



Episode 12: "Context Is Crucial When SHIFTing Behaviour for Good"

with Kate White, Professor of Marketing and Behavioural Science at UBC Sauder School of Business.

Kate White is another amazing co-founding member of UBC Decision Insights for Business & Society (UBC-DIBS); her work is a great example of conducting Behavioural and Decision Science research that combines theoretical innovation with real-world applications and impact. Kate tells us how to use the "SHIFT" framework to encourage people to adopt sustainable and prosocial behaviours; she also highlights the importance of both context and testing to make sure BI is done well.

Transcript:

KIRSTIN APPELT, HOST: Welcome to this edition of Calling DIBS. I'm your host, Kirstin Appelt, Research Director with UBC Decision Insights for Business and Society, or DIBS for short.

Today, we're calling DIBS on Kate White, one of the founding faculty members of DIBS. And I'm really pleased we're able to have Kate on the podcast today. Kate is a Professor of Marketing and Behavioural Science. She holds the Professorship in Consumer Insights, Prosocial Consumption, and Sustainability. She is also the Academic Director of the Peter Dhillon Centre for Business Ethics, and she's one of the most prolific and impactful marketing researchers in the world. And I'm always impressed by Kate's portfolio of projects on the go. So, I'm excited to chat with her a bit about those projects today. So, Kate, welcome to the podcast.

KATE WHITE, GUEST: Thanks for having me.

APPELT: Maybe we could start out by having you tell us a little bit about yourself.

WHITE: Okay, I am actually a social psychologist by training. But as you mentioned, I work in Marketing and Behavioural Science. I'm really interested in sort of the psychological factors underlying people's behaviors. So, that's the type of research that I do.

APPELT: And that's a great segue into my next question, which is: what led you to a career using behavioural insights?

WHITE: That's an interesting question. I think there were probably different things that happened at different times. I think that in my undergrad career, I ended up taking a psychology class that I really liked and I really liked the professor. And I started doing research with that professor. I think I just got a real love for behavioural science and for doing research.

I think the reason that I have a career in behavioural science doing research is a little different, because at the time I was working with at-risk youth and it was a very rewarding job, but it was really challenging and I felt like there weren't a lot of job opportunities at the time. And so, I decided to go back and do my PhD. It was kind of that I really did have this innate enjoyment, but it was also that externally there weren't a lot of job opportunities at the time. So, I ended up going back to do my PhD.

APPELT: The person-by-situation interaction strikes again. Well, like I said, you are someone who has a lot of projects on the go. But I thought one of the ones that we could talk about today is one that I think is really useful for both academic researchers and practitioners, which is your SHIFT project, where you looked at some of the existing literature to develop a framework for how behaviour can be changed. So, can you walk us through what SHIFT is?

WHITE: Yeah, so SHIFT is really based on a project that we did. It was Rishad Habib and David Hardisty who are both at UBC, and what we wanted to do is do a review of the literature, some of the marketing literature, psychology literature, behavioural economics literature, on what are the factors that can drive people to be more sustainable in their consumer behaviours. And so, where SHIFT came from, is it just kind of fell into place that we saw that there were these buckets of factors that can encourage people to engage in sustainable behaviours.

So, SHIFT is really an acronym. Social influence is the S, habit formation is the H, individual self is the I, feelings and cognition is the F, and then tangibility is the T. And we like the name SHIFT obviously because it makes it easy to remember it's a nice, useful mnemonic. We also talk about ways to move behaviour that aren't super-- we're not talking about making rules and regulations. We're talking about more subtle ways of shifting behaviour. We liked the name SHIFT for that reason as well.

APPELT: And can you walk us through what each of those letters mean? Maybe an example of each?

WHITE: Sure, yeah. So social influence is kind of what it sounds like. It's just that notion that we're really very influenced by other people. It could be just the presence of other people makes us more likely to engage in sustainable behaviour. Understanding the expectations of other people, seeing other people engaging in behaviours, all make people more likely to engage in sustainable behaviours as well.

So, there's lots of studies on, for example, social norms where if you observe somebody engaging in a sustainable behaviour, for example, if your neighbours that are kind of in close proximity to your house, if they purchase and install solar panels on their home, it actually makes people much more likely to also purchase and install solar panels on their home. But there's been studies of like energy conservation at hotels and energy conservation at home, and just even communicating what other people are doing and learning that other people are doing the sustainable behaviour makes the individual more likely to do the same behaviour as well.

The H stands for habit formation, and so, as you can imagine, a lot of the things that we do that are not sustainable are just these things that we do kind of automatically, right? We sort of learn these behaviours in response to contextual cues. And so, like, every morning I just go to the same coffee shop and buy a disposable coffee cup. I just get in that habit. I just keep doing it and doing it and doing it. The habit formation one is really around, how do we break negative habits or, you know, undesired habits? And how do we form more positive habits?

There's some interesting stuff in the habit formation, literature. So, for example, if you can sort of disrupt the other things that are going on around the habit. So, for example, there's these sorts of moments of change that we talk about. If someone's moving house or they're having a baby or they're renovating their kitchen, that's a really nice time to also ask them if they want to make any other changes, because those sorts of cues that we're cuing the wrong behavior, a lot of them are disrupted. And if you can ask consumers to make changes during these times of change, it's more likely that you can form these more positive habits. Also,

things like “Make the thing you want them to do really easy”. Can you incentivize the thing you want them to do? Things like that fit under habit formation.

Individual self. There's a lot of stuff under individual self. But the basic, sort of, first thing to think about is whoever you're communicating to, I'm going to say “What does your consumer care about?”. But it could also be your target audience. What do they care about? And so sometimes the values and motivations that are really important to them are about sustainability, right?

It's okay to communicate directly about what are the sustainable benefits of a behaviour. But sometimes something else is important to them, right? So maybe, you know, it's important to them or, health and well-being is important to them, or saving money is important to them. So, kind of understanding of the individual that you're targeting, and what you think or what you have some knowledge of hopefully might really resonate with them. So, thinking about, you know, the individual that you're communicating to.

Feelings and cognition, I mean, that is a really big category. We often talk about the notion that people have these two systems of thinking. We sometimes act on our intuition, and quite quickly. Often, we use emotions when we're deciding what to do, what to choose, how to behave. And then other times, we're more thoughtful and cognitive in what we're doing. So, feelings and cognition kind of taps into those two sides of that coin. One of the ones I like to talk about is how sometimes feelings don't get used optimally.

When you're asking people to engage in sustainable behaviours, a lot of the time you see things like guilt appeals being used. So, kind of making people feel negative emotions and then hopefully they'll do something positive to alleviate those negative emotions. And so, a couple of things that help or if you know, it's okay to use a little bit of guilt, because it sort of does motivate the behaviour in the first place. If there was no reason to, nothing to worry about, we wouldn't have to change our behaviours, right? So, it's okay to give people a little bit of a something to worry about. Moderate amounts of negative emotions work best, and then the other piece is also giving them information on what to do next. So, “Here are the next steps you can take”, and even sort of giving them messages about in terms of cognitions, giving them messages about self efficacy, which is you can do this behaviour. “And actually, if you did X, Y, Z, here's what would happen”, right? So, giving people a sense of that they can make a difference.

And then the last one is tangibility. And so, I think tangibility is quite unique to domains like sustainability. And what it means is that when we ask people to, you know, can't you just be sustainable or let's talk about global warming or climate change. There are these really big, broad, abstract concepts. And it's really, it can be hard for people to get their head around it. And so, anything you can do to sort of make either the action or the outcome seem more tangible. So, if you can give sort of concrete examples or specific steps people can take, that kind of thing, you can make it more likely that they will engage in sustainable behaviour. That was a very long answer.

APPELT: That was perfect. I think that was a good set of examples. And I think this paper, it's been really useful for multiple audiences. And I think it also I've from what I've seen, has had a really good reception. It was-- you had a related article in the Harvard Business Review. There was an article in The Conversation. And so, I think you've gotten to reach a number of different audiences with the work. So, thinking about the practitioner audience, how do you think practitioners should use SHIFT?

WHITE: Yeah, I mean, I get this question a lot when I give this as a talk and people say “Oh, what is the one factor that's the most important, right? Like, if I care about one thing, what should it be?”. And of course, the answer is that it depends, right? It depends on sort of, you know, what is your context? What behaviour do

you want to change? Can you think about your target audience? What is important to them? What do they care about? What are their barriers for engaging in the activity?

I think the first step is to really understand your context and your behaviour and your target audience. And then, once you have a clear vision of that, thinking about okay, you know “Given what I know”, and I find that usually something comes to light, right? There is either something about a barrier or something about a benefit or a motivation that the target market really cares about. And then it becomes clear that we need to do something about social influence. Or it becomes clear that, you know, we're trying to give them way too much information. And what we really need to do is just make it easy for them, right? So, I would say, kind of really understanding your own context, behaviour, and audience, and then kind of mapping on after that, thinking about, well, given this, you know, which of the factors makes the most sense.

APPELT: That's a great answer. And I think that really underscores what we've talked about in the program where we've spent time talking about the importance of that exploratory research, whether it's secondary research, whether it's qualitative research, and how that understanding of the behaviour of the populations, the barriers and the touch points. It's so useful in terms of formulating the right intervention for the right combination of factors, like you can have a great intervention, but if you're using it with the wrong population or the wrong behaviour, it's not going to be helpful.

WHITE: Yes, I absolutely agree. And the other thing I would add to that too is the testing part, right? So, you can take something from a slightly different domain and think “This is a slam dunk, it's going to work”. And then, you move it over to a slightly different context with a slightly different audience and then maybe doesn't work as well. Or maybe there's some weird backfire effect that happens. And so, we've had that before. I've had that before where we're like, this is definitely going to work and then it backfired. I think that that the testing is a really important part as well.

APPELT: Absolutely. And that's something we are getting towards in our program, so that's a well-timed message as well. Do you have future research directions from this project that you're hoping to pursue?

WHITE: Yeah, that's a big question, as well. I guess we have some things that are more kind of applied. So, with Kirstin, I have a project with TransLink. We're looking at how do we get commuters to come back after COVID. There are some really interesting barriers there. And how do you appropriately communicate to get people to get back on board-- literally back on board with transit? And then I have some more that are theoretical.

I have another project where we kind of also in the paper, the SHIFT paper, we mapped out some kind of research gaps and research questions, and so, I have another paper where we're trying to look at activating feelings of what we call transcendence. And so basically what transcendence is, is this feeling that you're a part of something bigger than yourself, and what we're finding in our research is you can either give people a recall task or you can measure transcendence or you can have people go out in nature and they feel transcendence.

And so, we're looking at can we use transcendence to get people to be more likely to-- we find that it makes them more likely to engage in sustainable behaviours, which is maybe obvious if it were something like the nature manipulation. But we also find that it makes people more prosocial towards others. So, it makes them feel sort of connected to things broader than the self. So, that's very theoretical, but those are a couple of the ones that I'm currently looking at.

APPELT: That's really interesting, and I think it points to, correct me if I'm wrong, but you also see SHIFT as having applications not just with sustainability, but with other types of positive behaviours.

WHITE: Yeah. I think what we think is it applies to sustainability, but it also applies to prosocial behaviours. So, these types of behaviours where there's usually some cost to the self, right? If you're being asked to do something that's more sustainable, at least the perception is, and sometimes the reality is that it might take more time, it might cost more money, it might be a little more effort. Same with these prosocial behaviours, right? You might be, maybe you're donating money or you're giving your time to help somebody else. It's hard to get people to do these behaviours because they're a little bit of a hassle to the self.

I think the SHIFT factors apply to those types of behaviours where you're taking some type of cost to the self, and there's some kind of broader benefit. So, it could either be other people or could be used even the broader version of the environment and things like that.

APPELT: That's really neat. I think it is such an interesting way to have a framework to think about these things, and plan for meaningful interventions, hopefully including our project with TransLink.

WHITE: We shall see.

APPELT: TBD. So, you're also, as we mentioned, the Academic Director for the Dhillon Center for Business Ethics. And as part of that role, you've done a lot of work advocating for business to use BI for good. So, can you tell us a little bit about what that means?

WHITE: Yeah, so we've been doing a lot around business for social good. So, you know, when businesses want to engage at another level in ways that kind of give back to society. I think, you know, the older view of this was sort of the corporate social responsibility view. But I think businesses are being more and more creative and proactive in some of the things that they're doing. And so, we have a number of initiatives around this. So, we give out grants to projects that are with professors and graduate students, that are around this notion of business for social good. We've had some events on business for social good.

And one of the things we try to do, which you don't always see, is have academics and practitioners in the same rooms, listening to some of the same talks, which I think ends up being kind of cool. I think the academics really like it, to hear the you know, the business, the people from industry and business leaders come in and talk. And I think the people from the business world would kind of like to have the, you know, the academic insight. So, it was kind of cool that we sort of had both. We have a nice grant to run another big event, but because of COVID, it's on pause. I'm not sure when the next one is going to be. But overall, the response has been quite positive.

APPELT: What are some of the ways you've seen businesses use BI for good?

WHITE: Trying to think what I can say. I think we see more and more, a couple of things. One, businesses wanting to optimize things they're doing right. And so, if you're if you're taking a behavioural insights view and you're, you know, you're communicating to people and you want to make sure you're doing things as optimally as possible. I think that's one thing that I'm seeing.

And then I think the other thing I'm seeing is businesses who want to encourage positive behaviours on the part of their customers. I think I can use this example. We did some consulting with Lululemon, and what they're doing is they're-- I mean, this was pre-COVID, but they opened up these really cool flagship stores. They opened one up in Lincoln Park, Chicago. And basically, they want the consumer to have this really

holistic, healthy lifestyle. So, you don't just go for your yoga pants. They also have really cool like workout rooms and yoga rooms and meditation rooms and meditation chambers, and they have healthy food and like so it's basically this very holistic view of getting their customer healthy. But they also really wanted to understand "How do we create healthy habits?". So similar to the habit shift. But you could also use it for health. Some examples where the business wants to encourage positive behaviours on the part of their customers.

APPELT: And why don't we have a flagship store like that in Kits, follow up question?

WHITE: I think there will be. I mean that's the plan, so, I think they were being strategic.

APPELT: So, I think that was really useful because we've talked to more people in the public sector, so it's nice to hear a little bit about the private sector piece of things. And, maybe I'll just close with asking if you have a message or advice for our BI practitioners in training.

WHITE: That's an interesting one. I think I probably would just come back to, if it's with using insights in the work that you do, I would just come back to two things. I think the one is that you have to always think about tailoring. I kind of said this before, right? So, understanding your context, really understanding your behaviour, mapping your behaviours out and thinking about who your target audience is. So, really tailoring what you're doing and not just kind of cutting and pasting something that someone else used, really thinking about how it works in your context.

And then, I think the second one is the testing. So, even if you're like "This is going to be perfect.", sometimes there's surprises. I think it's definitely worth also doing the testing. I think those are the two pieces of BI advice that I would pass along.

APPELT: Yeah, I think those are very, very wise, and I think someone else mentioned previously the idea that there's sometimes this misconception that there's like a BI store and you can just go grab a BI tool off the shelf and just plug in and play. But it really does need to be customized, can't underscore that enough.

Well, thank you for joining us today. It's been really fun to hear a little bit more about the SHIFT project and some of your other work. So, I hope everyone picked up a few tips for thinking about how to shift behaviour in the right context with the right tools for that context. So, thank you for joining us today, Kate.

WHITE: Thanks for having me.

APPELT: And thanks to our audience for listening to Calling DIBS.
