



[Episode 87: Is Social Marketing BS \(Behavioural Science\)?](#)

with Shellee Ritzman, Division Manager for Corporate Communications with Metro Vancouver.

Shellee Ritzman joins the podcast to help us explore the overlap between social marketing and behavioural insights. We discuss their shared goal of understanding and changing behaviour for good, their different approaches to measurement and evaluation, and our hopes for a future where the two fields come together to maximize positive impact. Shellee also shares opportunities and challenges for using BI in corporate communications.

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 Shellee Ritzman.

Shellee is Division Manager for Corporate Communications with Metro Vancouver. Shellee was a member of the class of 2024 in the Advanced Professional Certificate in Behavioural Insights, so just a few months ago, and we loved having Shellee in the program, and I found out pretty early on that she had a background in social marketing. And I knew from that moment that we'd be asking her to join a podcast episode as soon as we freed up some time in her day by having her graduate from the program. So I'm really looking forward to our much awaited chat today, so welcome to the podcast, Shellee.

SHELLEE RITZMAN, GUEST: Thank you very much for having me.

APPELT: Let's just start with a softball question: can you tell us a little bit about yourself? Hopefully a softball, we'll see.

RITZMAN: Well, as you said already, I'm a Division Manager for Corporate Communications at Metro Vancouver. For those that maybe aren't familiar with Metro Vancouver, it's a federation of 23 different member municipalities, and we deliver core services like treating and delivering clean drinking water, managing garbage and recycling, and treating wastewater before it's released back into the ocean. So from a social marketing or behavioural insights perspective, we have a lot of meat to work with in this program.

And I ended up at Metro Vancouver, but I wasn't always there. My background was actually in advertising, and I had a really unique roster of clients that were focused on, well, they were government clients. And I was first introduced to social marketing back in, I think, 2004, and it was for a tobacco cessation campaign amongst youth, and it was really that particular campaign that really struck a chord with me, and it kind of made me no longer want for the big brands like Nike and Apple, and I really wanted to focus on work that would make our world a better place to live.

APPELT: I love this, and it's actually educational for me because I didn't realize exactly what Metro Vancouver did from tap to toilet, you know?

RITZMAN: Hahaha.

APPELT: And so I always ask about people's journey to BI, but I'm going to do things slightly out of order because we both already brought up this term social marketing, and I don't think all of our listeners will know what it is, so can you actually define social marketing for us?

RITZMAN: Sure. You know, when I was in university, I remember this came up and it was cause marketing. And then when I was in advertising, the phrase social marketing kind of landed on my plate, and it's really a process that applies marketing principles to create, communicate and deliver value in order to influence target audiences, influencing their behaviours to benefit society. So very similar to behavioural insights.

APPELT: Excited to tease these apart a little bit, but first let's hear more about your journey to BI. So we heard a little bit about how you got to social marketing, how did you go from there to BI?

RITZMAN: Marketing is kind of a tough gig, because everyone thinks they can do it. Everyone has an opinion. Everyone thinks, you know, that tagline would be funnier that way or, it's really hard. It's really hard to kind of defend your position on something, and as many years as I have, you inevitably face those folks who challenge what you're proposing. And I recognize the value, you know, in all the years experience I have, but what I really wanted to do is understand what motivates people to make that change.

And so I was kind of looking out there and I didn't really know about the behavioural insights program until I started looking at, it was actually a conference over in Denmark, and it was immediately rejected. That's too far, we're not gonna send you there. But then once I discovered this program, I honestly just thought, this is perfect, this aligns so well with where I've come from, and I really wanted to learn from experts in the field who could really just strengthen my way of thinking, my strategies, and my recommendations on projects that we're working on.

APPELT: I really like that, and I'm already seeing overlap in addition to the more meaty things, just the idea that people are like, oh, I know how to do that, and then when you peel the onion, it's more complicated. So how do you see BI and social marketing as being related? How did that background and social marketing influence how you approached BI and did it give you a leg up in the program or, you know, what did you really experience?

RITZMAN: I think it did give me a leg up to a degree. So when I was looking at kind of it's the scope, right, scale model looking at that compared to what I've done in the past. A lot of it does overlap maybe a little bit in different places. We maybe didn't have the same terminology for it, but there is a lot that is consistent. And I felt like there were a few places that BI really digs deep, and that is in the innovation piece. I don't feel like, at least in my history with social marketing, we've gone as deep as BI has, just with all the examples that were given in class, and it kind of opened my eyes to what more we can do, which was great because that's exactly what I was looking for, is right to strengthen that strategy and our positioning on campaigns and messaging.

APPELT: That makes a lot of sense. And I think, like you said, that kind of shared overlap in terms of process and also this idea that there's a shared goal of changing behaviour and understanding behaviours, that makes a lot of sense. And you talked about this going deeper: is that something you'll take back as you evolve how you do social marketing or what else are you taking back to think about how you do social marketing and apply BI to it?

RITZMAN: I'm definitely taking it back, but a little bit differently. So we have about ten campaigns that we run every year, and so certainly the learnings from BI will influence those, but what I've actually realized through the process of BI is I can take those learnings and find opportunities, smaller opportunities, at Metro Vancouver to explore other areas where maybe we don't have the same kind of funding, but we can still make change.

An example I'll throw out is something very specific, but it's battery recycling. If you don't recycle your batteries properly, or if you throw them in the garbage, they can actually create fires at the recycling and waste centers, and what if we could take these learnings and, you know, it's a singular activity, there's a certain place to recycle it, how can we explore what's being recycled? How much is coming in? Is it being recycled properly? And it just kind of it gets me really excited. I'm a bit of a research nerd, so I really like to get into the weeds on this kind of thing, and I feel like we don't always have to have the big budgets to work on our projects. We can find smaller projects and still create change and influence for good.

APPELT: Yeah, that's very exciting. One thing that struck me as I was approaching this conversation, and I do remember the very first time we ever met, and you actually asked me, how do I see social marketing and BI as overlapping, and I found it hard to answer because I it's not a term I had been familiar with. So my perception is that BI and social marketing are one of the places where it's the hardest to draw distinctions, because they do have a lot of overlap. Is that your experience or do you find it easy to carve them apart?

RITZMAN: I think they are so similar that it is hard to articulate how they're different. One of the examples of where I could see behavioural insights being quite different from social marketing is when we were working on our capstone project, it was focused on increasing the number of registered donors for BC Transplant, and we did the innovation, we came up with the message that had the best results, and then we talked about, you know, what that could look like if we were to scale it up.

But when we look at social marketing, what we're immediately thinking about in that realm is where all of these messages can go. And it's much bigger. And I feel like there is that promotional piece of social marketing that isn't really there in behavioural insights, and not that it couldn't be, because it depends on how you interpret scale, but I felt like it wasn't a deliberate step in the process. But still, behavioural insights is woven all throughout the social marketing process and vice versa.

APPELT: Yeah, it's a really fascinating intersection, and I'm excited that they're starting to build bridges between the two, because I think there is so much shared ground.

So last year you were kind of corporate communications manager by day and BI student by night, like a superhero. Now you've had some time to be putting these pieces together, and I'm curious if you figured out how to, you know, combine your identities into a super, super duper hero. Are there other opportunities you see for using BI specifically in corporate communications?

RITZMAN: I do, I do. One of the things about BI that I really, really enjoyed was the idea of the choice architecture. It was really a term that I came to learn through BI, it's nothing I really thought about before, and while I've always, in my life had an inclination to make things easier to read, easier to go through, whatever, what are you trying to get people to do on this page? Click there. Oh, okay.

You know, I've always had that inclination, but I haven't had the name for it, and now looking at how our campaign pages are set up, or even not our campaign pages, even something like getting someone to register their old wood burning stove properly because you're supposed to do that, how can we make that really easy for people? You know, and this is something that especially at Metro Vancouver, we have so many programs

out there for the public. There are a lot of ways that we can simplify the ask from our residents and get to the desired end for everyone.

APPELT: Yeah. For me, choice architecture has also been just such a useful term, because when you have that term, I think it helps you see things more as building blocks or building obstacles, depending, as the case may be, and when you have that lens, you really think about it from that perspective of, you are building something, and so what's movable, what's fixed and how do you make a better building or in this case, choice architecture? So that term has always really resonated well for me.

On a kind of related note, talking about things that make choices easier, things that make it harder, we talk a lot about having to match the barrier to the solution, but sometimes I find BI isn't great about looking at how different folks have different barriers, and that barriers may differ by population, and I know you've worked in various contexts on media campaigns, in organizations, as consulting all different situations and I'm assuming in some of those situations you've come into this experience of those different groups within the larger population you're reaching. Is that something you've kind of tackled or thought about where, what do we do when there's different groups within the population?

RITZMAN: Yeah. You know, even before Metro Vancouver, this is something that we always looked at. One of my favorite examples of how important it is to consider everyone's perspective is, we were working on a project about how to save money and what to save money for. And we were, you know, trying to inspire people, and the imagery that we chose as our motivator to save was an image that represented a vacation. So to the folks who were putting together the creative, they put together a picture of a palm tree and some flip flops and a suitcase, and when we ran it through our ethnic consultants, they were quick to point out that that's not everyone's idea of a vacation, and he recommended that we actually change the image to be a little more inclusive and a little more broad to just luggage instead of choosing the destination, which is what we were doing, to just luggage. It still implies travel, but now we're not excluding a certain group. And I go back to that all the time when we're working on creative.

APPELT: That's a really powerful example, and I like that it wasn't about having different destinations, in this case, literally destinations for different groups, but realizing what's the core that's shared across them. In this case, luggage always signifies travel for pretty much everyone, and so you're able to take a step back and really approach it from the really analytical angle, and then it really also just reminds me in BI of, you know, the explore phase where we're supposed to be researching what works for whom, and if you do a good job there, you do catch these things, so I love that example.

Beyond what we've already discussed, are there particular concepts or skills from BI that have really stayed with you?

RITZMAN: There are. You know, whenever we're running campaigns, we often conduct A-B testing. So we'll have a few messages out there and we'll see which one performs best, you know, which ad gets the most click through rates. Something that kind of made me pause and rethink our approach was when we were examining messages in the BI program, looking at random controlled trials, and looking at how discreetly we were testing these messages so that there was no overlap, because we don't ensure that with our social marketing campaigns. That would be very hard to do unless we ran one at a time, but even then, it doesn't mean that someone didn't see one previously. So I thought that was really interesting.

And while I don't know that it's a practical example for how we approach our social marketing campaigns, I think it is absolutely something that we can consider for other projects as we go through, it just depends on kind of the scope and the ask and of course, the audience. But that definitely influenced me.

And the other piece that has sat with me is the ethics piece of BI, and it's not to say that what I was doing was unethical before, but what we're asking, how we're asking, who we're asking, are we being inclusive? Are we giving everyone that, you know, we would be interested in hearing from a fair chance at answering this survey or seeing this message, or even just filling out an online form? You know, if we want people to fill out an online form, but it's only in English, and English isn't their first language, is this something that is fair? So, that has really stuck with me as well.

APPELT: I really like that. Those are some of your takeaways, because I think for me too, oftentimes we're trying to be ethical, but then having specific frameworks of questions to ask yourself really helps you approach it from multiple ways and helps you further develop kind of like your, I always call it like your Spidey Sense of like, oh, this one doesn't feel comfortable, and it just adds questions for you to ask yourself, so it really, I guess, adds more tools to your ethics toolkit and one way of talking about it.

And then the RCT piece too. I think, like you said, even if you're not running a full RCT is just having that in the back of your mind as an idea of like, oh, are there ways we could test the messaging and whether or not it's a full RCT, are there ways we could do like pilot testing and things? And just having that rigorous measurement in the back of your head gives a lot of opportunities.

Looking ahead, are there things that you're very excited about for BI, whether it's any ideas or research or upcoming events or just anything in the BI realm?

RITZMAN: I've kind of a funny answer to this. When I was deciding whether or not I was going to step out of advertising and move into the public sector, a few things were going through my mind.

One of the things was, the world is obviously becoming so digitally focused that I can either go down the digital path and really concentrate my learnings and my efforts there, or I can really stick with social marketing, which is what I came to love, because the world will always need social marketing. People need people. And I felt that this was the best route I could take for me personally from a values perspective, but also from just a world need perspective. There will always be opportunities. So just big picture, I think the more that this is practiced, the more we're getting it right, and it's pretty challenging, this world, you know, just trying to figure out what message really influenced people, what messages will work. It's hard, but I am, you know, embracing this kind of work because I truly believe in it and that this is the way that, you know, our society will function best.

APPELT: I totally see what you mean about the different paths and that I think also when you do social marketing BI, social marketing and BI, whichever wherever you land in that Venn diagram, you're really setting yourself up to have the tools to contribute to the various challenges out there, and there are so many, and so it's a really exciting place to be because you can have an impact. So I really like that.

Do you have a message for our new BI practitioners in training? And maybe it's just what you just said, that it's a great place to be. Come on in, the water is great.

RITZMAN: I think it is truly a great place to be. This is really good work that we're doing, but it's hard work, and there are a lot of examples where social marketing or behavioural insights might not lead to the results that you're looking for, but, you know, I guess my advice would be to just stay curious. If something's not working, go at it from another angle and try a different perspective. We've been working on some of the same projects for years, just every year we're tweaking things as we learn more we're tweaking and tweaking and we are making change over time. So just stay curious.

APPELT: That's perfect. Yeah, and I think, like you said, a lot of times it is incremental work where you learn and you adjust or new barriers come up, new things cross people's radars, and so you're adjusting, or a new populations are impacted and you're adjusting, so I like the idea of staying curious, and that's one of the things I most love about the work I do is that there's always new things to learn, so you never, never have a dull day in BI.

RITZMAN: That's right.

APPELT: Thank you, Shellee, so much for joining us. I think the BI and social marketing are really powerful tools that do have all this overlap, and what's exciting is that there's different groups working on them, and there's not that much overlap between the groups yet, but I think when we start to bring those groups together, it's going to create a really powerful set of partnerships and a lot of great teamwork, and I think together we can all do a lot of good. And with folks like you in this bridge position, I think it's a really optimistic place, and I'm really excited to see what we can all do together. So thank you for joining today and for being a bridge in this space.

RITZMAN: Thank you very much for having me. This was great.

APPELT: And thanks to our listeners for joining another episode of Calling DIBS.
