

The 5R Guidelines for a strengths-based approach to co-design with customers experiencing vulnerability

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Rebekah Russell-Bennett, Nick Kelly, Kate Letheren  and Kathleen Chell

Queensland University of Technology (QUT), Australia

Abstract

This research note addresses a significant gap in the literature in researching marginalised customers who may potentially experience vulnerability: the need to use a strengths-based approach in designing social marketing research. There has been a (positive) trend in recent decades towards greater inclusion of stakeholders in social marketing research, design and evaluation through the adoption of *co-design* methods. However, a theoretical issue that has not been adequately addressed within social marketing research (with some exceptions) is that it is possible to use co-design methods in such a way that the language and approaches that are employed serve to *further disempower these groups* through a deficit-based discourse. This research note uses reflexivity to propose a set of guidelines for how to implement a strengths-based approach when co-designing with customers experiencing vulnerability, specifically from a social marketing perspective. A real-world program in the context of empowering mature women to maintain secure housing is used to illustrate the guidelines.

Keywords

co-design, services, strengths-based, customer vulnerability, social marketing

Introduction

Vulnerability is an important topic for marketers. Social marketers have a primary goal of improving the quality of life for people experiencing vulnerability while commercial marketers have a primary goal of generating profit from customers who may or may not be experiencing vulnerability. While both groups of marketers have an interest in customers experiencing vulnerability, the primary

Corresponding author:

Kate Letheren, School of Advertising, Marketing and Public Relations, Queensland University of Technology (QUT), 2 George Street, Brisbane, QLD 4000, Australia.

Email: kate.letheren@qut.edu.au

alignment with social marketing makes the context of social marketing a natural starting point for developing methods that foreground the lived experience of marginalised groups. Thus, the scope for this paper is social marketing.

This research note is concerned with the use of co-design when working with customers experiencing vulnerability. Social marketing researchers and practitioners first noted the importance of co-design when developing social marketing interventions in approximately 2008 (White, 2008). While social marketers are ‘early adopters’ of co-design within the various marketing sub-fields, there has been an implicit deficit-approach underpinning much of the previous co-design research. Co-design is intrinsically based on the value that customers can bring to the design process (Trischler et al., 2018), yet there remains a need to understand the additional sensitivities when using co-design in the context of vulnerable customers. A deficit-approach is evident when social marketers use terms such as ‘lacking’, ‘less’, or ‘unable’ when describing customers, or negative terms such as ‘homelessness’, ‘domestic violence’, or ‘obesity’ to describe the social problem. Examples of co-design in social marketing that use deficit-language include: a study on school dropout rates which focused on what students don’t do rather than what students can do (Schmidtke et al., 2020), and an anti-shisha (waterpipe) campaign that focused on the harms of smoking shisha rather than offering an alternative (Chan et al., 2022). A deficit-lens implies that customers are powerless and do not possess sufficient agency, capabilities or resources to address social problems (Sharpe et al., 2000). So, while co-design offers a more participatory approach than traditional expert-led approaches—such as focus groups (to validate or test), structured interviews, or market segmentation—it is less likely to result in a solution that is empowering or provides agency when approached from a deficit perspective.

The alternative to a deficit-approach is a strengths-based approach which develops interventions predicated on “...the belief that all people have a wide range of talents, abilities, capacities, skills, resources, and aspirations. These strengths drive human growth when they are identified, recognized, and developed” (Hill, 2008, p. 107). This research note articulates five guidelines for developing a strengths-based approach to co-design in social marketing, developed through a project working with mature women. A primary focus of this new model for social marketing is an emphasis on strengths-based language both in terms of communication and mindset, where the role of language in market-shaping has been identified in previous research with calls for more research on language systems (Pels et al., 2022). Our research responds to this call.

We adopt a critical social marketing perspective in this research note by using reflexivity. Critical social marketing involves critical introspection about frameworks, methods, practices and approaches which results in further development of the field (Gordon & Gurrieri, 2014). Reflexivity is the reflection on how meaning is created throughout the research process and how this can influence outcomes (Nightingale & Cromby, 1999).

There are a number of past social marketing studies that use a strengths-based approach to co-design implicitly, with only some recent studies more explicitly identifying as using a strengths-based approach (Glavas et al., 2020; Russell-Bennett et al., 2020). However, implicit use of strengths-based co-design is not systemic or systematic and leaves room for social marketers to continue to use the deficit-approach without realising there is an alternative approach. Therefore, while we acknowledge the broad application of a strengths-based approach in many social marketing co-design studies, we identify the research problem as a lack of explicit guidance on HOW to implement a strengths-based approach to co-design for social marketing.

The aim of this research note is to share a set of guidelines for using a strengths-based approach when co-designing social marketing interventions. The guidelines are the result of our reflections on the research processes involved in a two-year research project co-designing with stakeholders towards a goal of improving the wellbeing of mature women in the context of housing. We therefore adopt a reflexive approach to the social marketing process (Gordon & Gurrieri, 2014).

Background literature

Co-design for working with customers experiencing vulnerability

There has been a positive trend in recent decades towards greater inclusion of stakeholders in proposing, designing, and carrying out research through adoption of *co-design* methods by researchers, governments, institutions and firms (Jagtap, 2021; Zelenko et al., 2021). Co-design has its origins in the Scandinavian traditions of participatory design (Sanoff, 1990) and is designerly activity through which “people come together to conceptually develop and create things/Things that respond to certain matters of concern and create a (better) future reality” (Zamenopoulos & Alexiou, 2018, p. 12) and marks a shift from designing ‘for’ the user to designing ‘with’ the user (McKercher, 2020; Sanders, 2002).

Co-design has been used in the context of social marketing and service design by bringing the lived experiences of customers into the development of design solutions (White, 2008). A recent study suggests that co-design (in the context of service design) can lead to design concepts with increased user benefit and novelty (Trischler, Pervan, et al., 2018b). Co-designed solutions can be juxtaposed with expert solutions based on secondary knowledge, which can lead to a lack of adoption and engagement from the very people it sought to serve (Steen et al., 2011). Co-design can benefit customers as well as researchers/practitioners and can provide the resources necessary to leverage insights into change (Domegan et al., 2013).

Much of the co-design literature focuses on the benefits of being designerly and collaborative through these techniques. However, complex skills are needed to facilitate the co-design process with a diverse team to realise these benefits (Trischler, Kristensson, et al., 2018a). So while there is growing evidence of co-design in social marketing, there remains a gap within the literature for how to co-design in the context of customers experiencing vulnerability. As with many designerly approaches, co-design often focuses upon *problem finding* to ensure that the right problem is being addressed. This can be problematic when co-design lapses into deficit-centred responses that clarify a problem in such a way as to disempower participants (Costanza-Chock, 2019). Co-design needs to be facilitated in a way that creates safe spaces and is explicitly empowering for the participants who are involved (Bustamante Duarte et al., 2018; Hussain, 2010). Empowerment is recognised as one of three key factors in meaningful engagement in participatory design (along with input and agency, Willmott et al., 2022). This issue of empowerment is clarified through a consideration of the origins of strengths-based approaches.

Critiquing the deficit approach and introducing a strengths-based approach

The deficit model in social science has its origins in the application of scientific principles within social work in the early 20th Century, as a reaction against approaches that were based more upon codified morals than upon reason (Leiby, 1978). The scientific approach to social work—further influenced by the popularity of psychoanalysis in the 1930s—placed primacy upon *defining the*

problems of individuals, families, and communities so that more rational approaches could be adopted to dealing with them (Rapp & Goscha, 2006, p. 5). While these origins are understandable, such a problem-centred focus supported the development of a “language of pathology” (p. 5) in which practice begins with understanding all the facets of a problem. This approach contains within it an assumption that “an accurate naming of the problem will necessarily lead to an appropriate intervention” (Rapp & Goscha, 2006, p. 8), something that is echoed within the current popularity of design thinking approaches (Kelly & Gero, 2021). Criticism of the deficit approach to human behaviour has gained traction over several decades in fields including psychiatry, linguistics, education, disability studies and justice (Dinishak, 2016) with recent interest from marketing (Raciti et al., 2022).

The notion of a *strengths-based approach* originated in reaction to a “near obsession with aberrations, problems, pathologies, deficits” within social work which is referred to as the *deficit model* (Rapp et al., 2005, p. 79). Key criticisms of a deficit approach are the unintended negative effects, including victim blaming (Cook et al., 2005; Maton et al., 2005) and a sense of disempowerment and helplessness (Dinishak, 2016), continuation of oppression and a focus upon individual damage and environmental deficits (Rapp & Goscha, 2006), a focus on negative outcomes, emotions and traits (Maton et al., 2005), emphasis on the problem rather than a collective view of the individuals abilities and circumstances (UK Department of Health and Social Care, 2019) and impeding progress in the field (Dinishak, 2016). Research on Indigenous people’s health strongly criticises deficit approaches for pathologizing Indigenous people as “prone to ill health and in need of intervention” (Bryant et al., 2021, p. 1406) which has resulted in privileging Western health solutions and making Indigenous health concepts invisible. Likewise the deficit approach to language development in children using terms such as ‘word gap’ has contributed to marginalising children from racialised, disabled and low-income communities (Cushing, 2022). There is a growing evidence-base that also demonstrates that deficit approaches to social issues are not as effective as programs that are strength-based (Centre for Child Well-being, 2011; Pattoni, 2012; Staudt et al., 2008). These critiques and evidence-base lay the foundation for the field of marketing to shift away from a deficit discourse in research relating to customer vulnerability.

In contrast to this deficit approach, a strengths-based approach looks at human wellbeing and potential through development of collaborative relationships that instil hope and build strength, an approach that has received widespread recognition through the positive psychology movement (Seligman & Peterson, 2004). A strength-based approach is built upon an understanding that people can draw upon both their individual and environmental resources in achieving goals that they have set for themselves (Cowger, 1994). Strengths-based approaches to practice can be distinguished through six principles (Rapp & Goscha, 2006): (1) the goals of the practice are determined with the input of the stakeholders; (2) an explicit assessment and documentation of strengths; (3) environmental resources are considered, to find matches between stakeholder desires, strengths, and resources; (4) practices are implemented to achieve goals that make explicit use of stakeholder strengths as well as environmental resources; (5) practices are hope-inducing through the prioritisation of this relationship between stakeholders and practitioners; and (6) a focus upon provision of meaningful choices for stakeholders so that their autonomy is respected.

Since this widespread use within social work, the strengths-based perspective has been adopted by many fields including nursing (Cederbaum & Klusaritz, 2009), mental health (Xie, 2013), and justice (Hunter et al., 2016). The strengths-based approach has been demonstrated as more effective than deficit approaches in many cases. For instance, the Stay Strong App for

Indigenous health (Australia) achieved significant improvements in wellbeing, life skills, alcohol dependence and self-efficacy of First Nations clients with chronic mental illness (Menzies Institute, 2021). Likewise the Fresh Start Prisoner Re-Entry Program (USA) that built on the strengths of prisoners was found to be effective (Hunter et al., 2016). Social marketing has explored approaches that are similar to strengths-based, such as transformative service research (which seeks to leverage the transformative aspects of services to enhance customer wellbeing - Rosenbaum et al., 2011). There are other approaches that similarly emphasise the resources of individuals and communities using similar terms, such as the asset-based community development approach (Phillips & Pittman, 2014).

Strengths-based co-design – the what and the how

In social marketing there is both explicit and implicit use of a strengths-based approach to co-design, providing evidence of the WHAT of strengths-based co-design methods. There is broad use of a strengths-based approach throughout many social marketing studies, despite the lack of explicit use of the term strengths-based approach. There is also increasing use of explicit positioning of social marketing co-design as strengths-based with processes provided (see Ey & Spears, 2020; Morris et al., 2019; Russell-Bennett et al., 2020). However, the problem we are addressing in this research is not that there is a lack of strengths-based approaches in social marketing co-design, rather we identify the lack of explicit guidance on HOW to implement a strengths-based approach in co-design for social marketing. Without this guidance, the use of a strengths-based approach may remain unintentional and therefore unsystematic across the field of social marketing. Only a few years ago, Wood (2019) noted in the *Journal of Social Marketing* that there remains limited discussion of strengths-based approaches as a way to orient social marketing. Given that co-design is so fundamental to social marketing and that in many cases a deficit approach to co-design is likely to be the result of a lack of explicit guidance on how to be strengths-based rather than intentionality to be deficit-based, there is a strong need for practical guidance.

Reflexivity, introspection, and design theory building

Reflexivity is a methodological issue for social marketers (Gordon, 2011). As it is underreported in research, there is no convention as to how to present researcher reflexivity in journal articles. While there is increasing discussion on researcher reflexivity in social marketing, as Gordon and Gurrieri (2014, p. 265) note “there is a paucity of personal reflection upon the research process”. Thus, there is a need for guidelines to assist social marketing researchers in using reflexivity in their research processes.

In this research note we outline a set of five introspection guidelines as steps when co-designing a social marketing project with customers experiencing vulnerability. These guidelines were developed through reflection upon our research processes in a two-year research project co-designing with stakeholders towards a goal of improving the wellbeing of older women in the context of housing. During this process there was significant tension between the pull towards deficit language (‘homeless women in need of help’) and the intent to use a strengths-based approach (‘women experiencing vulnerability who have resources that they can draw upon’). Incremental learning and reflection upon the recurring question of “*where did deficit language/thinking creep into our project?*” has led to the development of the following guidelines which represent a theoretical proposal; they have not yet been empirically validated. There is significant value in describing these guidelines and their origins for the

purpose of improving co-design in social marketing, as an activity in design theory building (Cash, 2018).

Guidelines for strengths-based co-design in social marketing

This research note thus articulates guidelines for ensuring that co-design within social marketing is strengths-based. Co-design is a highly contextual, dynamic process responding to the unique circumstances of the knowledge being co-created and the participants involved (Trischler, Pervan, et al., 2018b) and can be implemented using many available frameworks. Co-design prioritises the position that “everyone is creative and that everyone has the natural ability to engage in design as long as the right processes and tools are provided” (p. 19). This focus on designerly processes and tools does not necessarily lead to problem-framing that is empowering for participants. The aim of developing these strengths-based guidelines is to provide a set of reflective, introspective practices for researchers who are facilitating co-design processes to ensure that the research is empowering for participants.

Context: Mature women and maintaining secure housing

The social issue through which we developed this strengths-based approach was *maintaining secure housing* and the cohort of interest was mature women (aged over 55). The alternative deficit term for this social issue is ‘homelessness’, however we do not use this term unless referring to specific policies or programs that use this term or to statistics. Mature women are marginalised within society and are often referred to as being “invisible” due to their lack of representation (Walkner et al., 2017) and can be considered situationally, inherently, and sometimes pathogenically vulnerable (Greig et al., 2019). As these women are amongst those who depart from the dominant majority and hence have been traditionally excluded/invisible for not fitting societal norms such as gender, age, ethnicity, sexuality, ability, health or other arbitrarily constructed distinctions (Sidanius & Pratto, 1999), it is all the more important for us to understand and empathise with their experiences.

Our project was motivated by evidence that mature women who have a change of circumstance, such as loss of a partner or income, become vulnerable to homelessness—to the point that older women are the fastest growing group of homeless people in Australia (Australian Housing and Urban Research Institute, 2020), with the penultimate Australian census revealing an increase of 31% in just five years (ABS, 2018). Women tend to experience ‘invisible homelessness’ whereby they move in with children or friends, sleep in their car, or ‘couch surf’. Women also tend to avoid identifying as being at risk of homelessness and avoid seeking support until at crisis point (Darab & Hartman, 2013), in part because of historic marginalisation (e.g., unpaid work, lost superannuation, structural sexism) that they have internalised and normalised. For details on the project visit the website (<https://www.research.qut.edu.au/best/projects/womensbutterfly>).

The project followed a path from conducting research into the co-design issue (desktop review), running workshops with expert proxies and people with lived experience to determine project goals, and conducting cycles of prototyping and getting feedback from participants (Russell-Bennett et al., 2021). Throughout this journey, there was a challenge to ensure that all co-design team members continued to use strengths-based—rather than deficit—language, Figure 1.

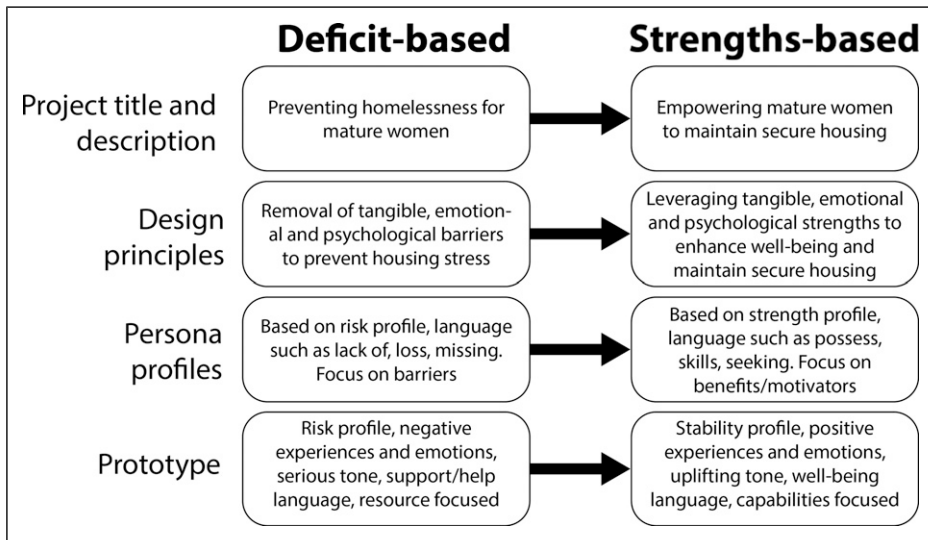


Figure 1. Examples of deficit-based and strengths-based language when designing for social marketing for older women in the context of housing.

Proposing guidelines for a strengths-based approach

Fundamentally, a project cannot use a strengths-based approach unless the issue at hand is *reframed from a strengths-based perspective* (Saleebey, 2006). This reframing cannot be adequately achieved without first *relating to the client* to understand their individual and environmental capabilities, i.e., their strengths. This relating alone is insufficient: a concomitant *revising of the language* used by a social marketing team to fit with this new understanding is now needed. Over the course of a project or campaign language will slip unless researchers have done the reflective work to *rewire the brain*. This reframing of the problem and revision of language is given meaning and enacted through a *redesigning of methods* to fit with this strengths-based framing of the issue. This can be summarised as a set of introspection practices offering guidelines for a strengths-based approach: (1) reframe the issue label; (2) relate to the client; (3) revise the language; (4) rewire the brain through reflection; and (5) redesign methods. The introspection occurred both at an individual level and at a team-level.

Reframe the issue. The first guideline is to reframe the issue, ensuring that participants in the research do not have a ‘problem to be solved’ so much as set of resources/capabilities to be drawn upon in changing something in the world for the better. Reframing the issue is a central task in adopting a strengths-based approach to understand the nature of the problem, for example, reframing the issue of battered women from helpless to help-seeking (Cook et al., 2005). A risk problem is essentially a deficit-approach and positions the customer as a (potential) victim with limited agency. A caveat is that a positive view of the strengths of ‘at-risk’ customers does not ignore their problems or difficulties; rather, strengths-based approaches define customers by their multiple strengths (rather than by their difficulties) and recognise that future solutions can leverage those strengths (Maton et al., 2005). Many social marketing programs aim to reduce or prevent risk however this is at odds with research that shows policies and programs adopting this approach have little success (Hammond & Zimmerman, 2012). Reframing an issue from at-risk to at-potential

shifts the focus from negative behaviour and coping strategies to positive behaviours and agentic strategies.

In our project, the issue of ‘homelessness’ was the starting point of the project as this was a key priority of the funding body (see acknowledgement). At commencement of the project the research team had a limited understanding of a strengths-based approach to social marketing and did not realise the importance of framing the issue. We therefore later reframed the issue of preventing homelessness to maintaining secure housing which shifted the problem from at-risk (of homelessness) to at-potential (of retaining a home).

Relate to the customer. The second guideline is to relate to the customer and be able to empathise with their experience. This practice is integral to a strengths-based approach, following Lefebvre’s (2012, p. 124) approach to honouring social marketing customers through co-design: “... ‘Honor’ demands from us to have empathy and insight into people’s view of the puzzles we choose to solve together and how their possible solutions provide value and relevance to their needs, problems and dreams.” Essentially, co-design of solutions privileges the voices of those experiencing vulnerability, whilst at the same time allowing researchers to relate to, and connect with, the experiences of participants and to be united by a common goal.

Once the issue is reframed so that the experience of vulnerability is situation-based (e.g., experiencing housing stress) as opposed to identity-based (e.g., at-risk/homeless person) empathy becomes natural – if vulnerability is *experienced* rather than determined by *who* we are (Glavas et al., 2020), then any of us could one day have the same experience.

With this mindset shift in our project, the co-design workshops, persona and resource development, and user-testing, provided the conduit for honouring (and hence relating to) the women we sought to serve. The development of personas allowed anyone exposed to the personas to see themselves and other people represented. The multiple iterations reflecting a strengths-based approach allowed us to be critical of our approach to honour and dignity (Lefebvre, 2012), while user-testing of developed resources ensured that the voice of the customer was continually sought to confirm the direction of the work.

Revise the language. The third guideline is to revise the language, which is only possible once the issue and the customer are understood from a strengths-based perspective. Language is a key feature of a strengths-based approach with both researchers and policy-makers recommending the use of terms such as resilience, potential and opportunity rather than at-risk, lacking and crisis (Cook et al., 2005; Hammond & Zimmerman, 2012). The importance of language as a market-shaping tool has been recently highlighted (Pels et al., 2022) with acknowledgement that language is a driver of the institutional nature of concepts. Language that is strengths-based focuses on empowerment and typically labels the condition rather than the person (Carroll, 2019; Glavas et al., 2020). Indeed, getting the language right is a key tenet of a strengths-based approach as recommended by the UK government (UK Department of Health and Social Care, 2019).

Applying this approach, we used language such as ‘experiencing a change of circumstance’ rather than ‘loss of income’ or ‘loss of relationship’ - such language resonated with women and provided a sense of hope or opportunity. Further, choice of language became even more important when describing personas, which were external-facing and needed to align with women experiencing a change of circumstances. Hence, we iterated multiple times to translate terms such as ‘struggling’ with terms that described the capabilities of the woman such as ‘help-seeking’ or ‘resourceful’.

Rewire the brain through reflection. The fourth guideline is to ‘rewire the brain’ through reflective practice to ensure that a strengths-based approach is maintained throughout the arc of the research. In many contexts there will be tension through deficit language that creeps into projects over time, which needs to be addressed through internalisation of a strengths-based discourse. This is not intended as a literal rewiring of the brain (a difficult claim to instantiate) so much as explicitly recognising the reflection that is needed by researchers to ensure ongoing fidelity of a project ethos (Gordon & Gurreri, 2014). Reflection is a core feature of co-design, where “...effective and ethical codesign should start with critical reflection on the epistemological beliefs that are driving initiation of the process, including the ‘mindset’ of the codesign facilitators” (Moll et al., 2020, p.2) involving internal reflection, reflection on relationship, and reflection on the system within which co-design will occur. Reflexivity offers a mechanism for balancing power and control in the research process, a feature that is a key success factor for co-design (Moll et al., 2020). A barrier to reflection and reflexivity (being open-minded enough to question one’s own assumptions) are behavioural biases, particularly the principle of fallibility (Soros, 2014). Behavioural biases are our brain’s way of speeding up the decision-making process for us but this often results in systematically biased judgements (Thaler, 2016). So left unchecked, the social marketing research process would inherit these biased judgements without the aid of reflection.

As part of our project, we engaged in ongoing reflexivity to counter the effect of biases such as confirmation bias (looking for information that supports current beliefs or practices), familiarity bias (preferencing processes and knowledge that we know, and which make us comfortable) and commitment bias (where we reinforce past decisions even when faced with new information). We achieved this rewiring of our brains through team processes that held each other accountable, creating space within meetings and activities to reflect and revisit old ground, providing a psychologically safe team culture to admit errors/mistakes and failing fast to learn from doing.

Redesign the method. The final guideline is to redesign the method. The methods used by social marketers should be designed in light of the deep understanding of customer strengths that comes from fulfilling the prior steps. This means iterating through the method process and altering the design (redesigning) to align with the knowledge that has emerged. The methods that are devised at the outset of a project typically require redesign during the course of that project, even when those running it are well-intentioned and knowledgeable about strengths-based approaches. This is because the understanding of the context for the project and the stakeholders and their strengths will change as more is learned. A design mindset is required for remaining open to learning and redesigning methods as more is understood (Johansson-Sköldberg et al., 2013). Co-design of methods means involving stakeholders in the whole process of social marketing. This will be situationally determined but can range from stakeholder co-creation of key concepts, themes, goals, priorities, and research questions through to co-designing communication protocols, desired outcomes, and evaluation strategies (Zelenko et al., 2021). There is often tension between the extra resources (typically time and funding) that are required to involve stakeholders in co-design and it would be naïve to suggest that all stakeholders should be co-creating all parts of every project—there is a need for situationally determining what is ethical and what is possible in the context of each project. Further, for those stakeholders who are involved in the work, there is a need to find a balance between respecting their opinions (asking a lot of them) and respecting their time (limiting demands upon them); recompensing stakeholders for their time is one way to navigate this

tension. Therefore, the ability to revisit and redesign the methods as new information comes to light, or clarity in terms of resource allocation increases, is critical for implementing a strengths-based approach.

A strengths-based orientation helps to guide decision-making in the (re)design of methods: what are the *strengths* that each stakeholder brings to this project and how can they be involved from that position of strength? In our project the initial plan was to hold a series of co-design workshops with expert proxies to obtain their opinions on all aspects of the project—effectively asking them to do much of our design work. These workshops were redesigned from a strengths-based perspective: we focused on what it was that these expert proxies brought to the project (deep understanding of the women we were designing for, and in some cases lived experience) and tailored the workshops to draw on those strengths. In practice, this meant focusing on which *tools* provided via the digital prototype (links to other websites) they thought would be most useful to each of the four personas. This sounds like a simple change, but it required all of the above steps to be done effectively: workshops were no longer about “tools to avoid homelessness” but rather were about “tools that support different types of wellbeing”; the personas were no longer “women at different stages of risk” but were “women in different life circumstances with diverse strengths”. The redesign of methods was broad in scope, changing what we did and (significantly) our framing of how we approached the topic.

Contributions for social marketing

The purpose of this paper was to address the research problem of a lack of explicit guidance on HOW to implement a strengths-based approach to co-design for social marketing. Despite the recognition that social marketers should be critical and adopt reflexivity in the research process, there has been little guidance on HOW to embed reflexivity in the process of designing and implementing a strengths-based approach to co-design. Thus the first contribution of this paper to the social marketing literature and to the literature on customer vulnerability is the identification of five introspection guidelines that can assist researchers in conducting co-design research with customers experiencing vulnerability. This provides scaffolded direction for ensuring that co-design methods in social marketing are empowering and systematic in adopting a strengths-based approach. There are already social marketing studies that use a strengths-based approach in co-design (Domegan et al., 2013; Raciti et al., 2022; Sherring, 2021; Trischler, Pervan, et al., 2018b), however without any guidelines or explicit calling out of the deficit approach, there is a risk that future social marketing studies will unintentionally perpetuate the deficit approach. This is particularly likely for researchers who are new to the social marketing field and are not familiar with strengths-based approaches.

A second contribution for social marketing is the identification of the importance of language in framing the social issue and designing the solution, expanding on previous research in this area (Small et al., 2020). Language has recently been highlighted as a key component of market-shaping, the evolution of markets over time through networked structures and ecosystems (Pels et al., 2022). Market-shaping is one of the aims of social marketing and policy and thus the central role of language in this process highlights the importance of shifting from a deficit discourse to strengths-based. An important feature of market shaping is the role of diverse actors in the ecosystem (Pels et al., 2022) and thus a central feature of social marketing research and practice going forward should be the use of strengths-based rather than deficit language by all these actors to ensure consistency in the system to enable customers experiencing vulnerability. Another key implication for social marketing processes is the need for iteration and reflection. This research note offers the lived experience of researchers and the use of iteration and

reflexivity to create the 5R guidelines for using a strengths-based approach when co-designing social marketing research and/or interventions.

Limitations and further research

A strengths-based approach for customer vulnerability can be extremely challenging to accept for some researchers as the notion strikes at the very heart of what we believe to drive the problems we seek to address. Early proponents of strengths-based approaches explain that professional practice in social issues reflects its origins in religion where human failings are the basis of problems (see [Staudt et al., 2008](#) for detail). Thus critiquing a deficit approach can be a challenge to our philosophical belief about the source of problems. More research is needed that directly compares deficit-based and strengths-based approaches for customers experiencing vulnerability. There may be other introspection practices; we included here five of them. Further research should undertake an empirical approach to continue the theory-building started here and identify further practices, contextual factors and boundary conditions.

While the scope of this research note is social marketing, once further testing is conducted, the 5R guidelines are likely to have utility for commercial organisations so further research should examine the applicability of the guidelines to other sectors, including commercial and for-profit. Commercial organisations could potentially use these guidelines for the development of programs to engage with customers experiencing vulnerability (e.g., hardship programs, marketing programs for products/services utilised by customers who may be experiencing risks).

We also acknowledge that research on groups experiencing vulnerability – whether within social marketing, non-profit or the commercial sector – is constrained and influenced by often biased societal systems and structures, and hence may not always offer a perfect voice for these groups. For example, needing to direct research attention according to political will and funding, which also means starting with a problem before a co-design approach has a chance to commence. Regardless of these issues inherent in our current systems, we maintain that continuing to focus on valuing the strengths innate to marginalised groups is essential to ensuring their voices influence the continued dismantling of structural imbalances.

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ORCID iD

Kate Letheren  <https://orcid.org/0000-0002-4299-2955>

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