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Two-stage taxonomy for measuring success in social marketing practice

M. Bilal Akbar
Department of Marketing, Nottingham Trent University, Nottingham, UK

Nihar Amoncar
Department of Management, Institute of Management Technology, Ghaziabad, India

Erik Cateriano-Arévalo
Department of Marketing, Queensland University of Technology, Brisbane, Australia, and

Alison Lawson
Derby Business School, University of Derby, Derby, UK

Abstract

Purpose – Given the lack of understanding of social marketing success in theory and practice, this study aims to investigate how social marketing experts conceptualize success.

Design/methodology/approach – In this qualitative study, the authors conducted an open-ended online questionnaire with 48 worldwide social marketing experts, most with more than 20 years of experience in the field. The authors analyzed data using topic modeling, a machine-learning method that groups responses/terms into cluster topics based on similarities. Keywords in each topic served to generate themes for discussion.

Findings – While behavior change is mentioned as paramount to conceptualizing success, participants prefer to use more tangible and less complex forms to define/measure success, such as campaign recall uptick. In addition, lack of funding was considered an important factor in measuring success. This study provides a two-stage taxonomy to better understand success in social marketing.

Originality/value – To the best of the authors' knowledge, this study is one of the first to conceptualize success in social marketing practice.

Keywords Success, Two-stage taxonomy, Social marketing, Behavior change, Behavioral outcomes, Evaluation

Paper type Research paper

Introduction

The achievement of intended behavioral objectives, effectively engaging the target audience and, in some cases, behavior maintenance has been considered the normative criteria by which social marketing interventions have been judged to be successful (Liao, 2020a, 2020b). This has significantly influenced social marketing practice. Still, it remains unclear to what extent these factors reflect the success criteria applied in practice to determine a successful outcome, signifying that little scholarly attention has been devoted to this area.

Theoretically, the underlying notion of measuring success in social marketing practice is context-dependent and discussed in different ways but still largely unknown. One

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framework for categorizing how success in social marketing interventions has been operationalized is Andreasen's (2002) benchmark criteria. These criteria are considered predictors of social marketing success (Kubacki and Szablewska, 2019) and were presented to successfully plan, design and implement interventions.

Andreasen's (2002) criteria are deeply rooted in commercial marketing and include behavior change objectives, consumer research, segmentation, targeting, marketing mix, exchange and competition. The criteria have been mostly used as a tool to analyze whether the interventions are designed as social marketing (Cairns and Rundle-Thiele, 2014; Xia *et al.*, 2016; Aceves-Martins *et al.*, 2016; Kim *et al.*, 2020; Čož and Kamin, 2020; Ryan *et al.*, 2021). Some argued that Andreasen's (2002) criteria do not reflect the current state of play of social marketing; hence, they should be applied with caveats (Akbar *et al.*, 2019; Suggs and Speranza, 2022). Others offered several new success factors, including marketing selection elements, meeting the needs of beneficiaries, designing effective communication tools, developing a feedback system, focusing on cost and benefit analysis, consumer orientation, strategic planning, information resources and research (Cohen and Andrade, 2018; Dietrich, 2016; Khajeh *et al.*, 2015; Kotler and Armstrong, 2016; Lee and Kotler, 2016; Liao, 2020a; Lin, 2014; Wood, 2016). Nevertheless, these factors operate differently in different circumstances, have a causal relation structure and remain notional.

Social marketing practice also recognizes factors that contribute toward successful results. These factors include setting up explicit behavior change objectives, using the most fitting communication channels that meet the target audience's needs, focusing on robust research on the target audience and pre-testing the intervention. Other factors comprise paying attention to the monitoring and evaluation channels, developing a partnership approach when dealing with complex issues and using theoretical underpinning to design interventions (Akbar *et al.*, 2021a).

Even though the literature presents a range of success factors informed by theory and practice, they are not necessarily sufficient considering the multidisciplinary approach and applications of social marketing (Gordon *et al.*, 2016; Gordon and Gurrieri, 2014; McHugh and Domegan, 2017). Some overlap is noted upon comparing success criteria put forward by academics and practitioners. These criteria mostly differ regarding applications and circumstances in which they have been used. Social marketing would benefit from more unified success criteria for better future practice. This study adds further impetus to the extant literature by exploring and analyzing the experts' perspectives.

Theorization of success is a common practice in many disciplines, such as law, justice and global development (Saeed, 2008), organizational behavior (Heslin, 2005), public health and health communication (Dwerryhouse *et al.*, 2020; King and Crisp, 2021), entrepreneurship (Razmus and Laguna, 2018) and business and management (Gorgievski *et al.*, 2011). Success is not yet formally conceptualized in social marketing practice, identifying a significant research gap. This study aims to fill this gap by exploring the views of social marketing experts to evaluate and conceptualize success.

The paper first analyzes the literature on current definitions and measures of success in social marketing practice, then the qualitative study results. Finally, a two-stage taxonomy of success based on the findings is presented to improve future practice.

Literature review

Interpretation of success

The interpretation of success in social marketing practice takes different avenues in the literature. The most simplistic interpretation sees success as the opposite of failure, highlighting that failure is caused by the absence of formative research and poor

management at the implementation stages (Akbar *et al.*, 2023; Akbar *et al.*, 2021b; Cook *et al.*, 2020; Cook *et al.*, 2021). However, the dichotomy of success versus failure to evaluate interventions has been criticized because it does not allow unpacking the elements that affect behavior change (Willmott and Rundle-Thiele, 2022). Others do not precisely define success but associate the term with compliance with certain conditions that predict success. Several terminologies are interchangeably used to present these conditions in the literature, including frameworks (Cohen and Andrade, 2018; NSMC, 2010), factors (Akbar *et al.*, 2021a), foundations (Kim *et al.*, 2021), criteria (Andreasen, 2002; Lynes *et al.*, 2014; Liao, 2020b) or principles (Lee, 2020; Carins, 2022).

Emerging systematic reviews explicitly suggest the benchmark criteria (Andreasen, 2002) as a measure of success (Cairns and Rundle-Thiele, 2014; Kubacki *et al.*, 2015; Firestone *et al.*, 2016). For example, applying behavior change, theory and the marketing mix is associated with program effectiveness (Kim *et al.*, 2019). More specifically, behavior change will likely occur when more benchmarks are used (Aceves-Martins *et al.*, 2016; Xia *et al.*, 2016). Similarly, while presenting an evidence review, Dietrich *et al.* (2022) recommended more use of benchmark criteria for successful outcomes. Some experiment-based studies, such as Lahtinen *et al.*'s (2020) work on fruit and vegetable intake of 6–13-year-old Finnish children, suggested the full application of the marketing mix is more effective than a promotion-focused campaign in increasing the fruit and vegetable intake within children. Such arguments highlight the assortment of ways of understanding success. Still, the notion of success is loosely presented in these studies, and various jargon is used to define success, such as positive outcomes, successful results and effectiveness. In essence, if a social marketing intervention complies with most of these conditions, it will be assumed to succeed.

The premise of *how success looks like in social marketing practice* was further developed by Liao (2020b), Lynes *et al.* (2014) and Akbar *et al.* (2021a). These authors broadly defined success factors, including some of Andreasen's (2002) benchmark criteria and novel factors emerging from practice. For example, Liao (2020b) tested 14 factors along with the execution of a health social marketing intervention in Taiwan to demonstrate which factors will lead to success and which factors were more influential/causal. The results showed that constructing effective messages to target audiences was the most important success factor, followed by meeting the need for beneficiaries to enact voluntary behavior change. Importantly, the author warned that success was determined by having enough resources/continued funding to carry out the social marketing intervention (Liao, 2020b), signifying funders' role, power and authority in measuring success (Akbar *et al.*, 2021b).

For a successful outcome, the work of Wettstein and Suggs (2016) distinguishes conceptual factors from procedural factors. Conceptual factors refer to the core concepts or foundational ideas that help characterize an intervention as social marketing, for example, the social marketing benchmark criteria (Andreasen, 2002). In contrast, procedural factors influence the internal and organizational development of social marketing interventions. In this group, the literature identifies several examples, such as message strategy (Finnell and John, 2017; Liao, 2020b), information sources (Liao, 2020b), operation process and planning (Liao, 2020b; Akbar *et al.*, 2021a), monitoring and evaluation (Liao, 2020a; Dietrich *et al.*, 2019; Akbar *et al.*, 2021a; de la Sierra-de la Vega *et al.*, 2022), social networks and partnerships (de Lange *et al.*, 2021; Schmidt *et al.*, 2022) and organizational resources (Liao, 2020b). From the aspect of planning and designing interventions, the synergy among procedural factors enhances the likelihood of a successful outcome. Even though these factors differ in number, type, or significance, they have two points in common:

(1) emphasis on effecting individual voluntary behavior change; and

(2) lack of attention to structural conditions influencing behaviors (e.g. poverty).

However, each factor's contribution to successful outcomes remains unknown from the management stance.

Success in downstream social marketing is associated with achieving behavioral outcomes defined at the early stages of the intervention after conducting formative research (Lavack *et al.*, 2007; John *et al.*, 2019). The broader definition of success (adapted from public health) highlights three dimensions:

(1) program success, i.e. meeting intended objectives and producing desired behavioral outcomes;

(2) process success, i.e. preserving the legitimacy of the process, ensuring successful implementation; and

(3) policy success, i.e. enhancing the policy agenda, sustaining the broad values and future direction (McConnell, 2010).

Behavioral outcomes in social marketing practice are understood twofold:

(1) eliminating or weakening an undesirable behavior, e.g. smoking; and

(2) maintaining or strengthening the desired behavior, e.g. exercising (Dibb and Carrigan, 2013).

Evidence shows that success is being measured in terms of behavioral outcomes and behavioral factors, including attitudes, knowledge or perceived self-efficacy, which are intermediate outcomes (Andreasen, 2002), and health outcomes, such as rates of morbidity, mortality and fertility (Stead *et al.*, 2007; Kubacki *et al.*, 2015; Firestone *et al.*, 2016). Still, the mechanism of measuring success at the process and policy level (McConnell, 2010) is largely unidentified.

Other outcome metrics to measure success have also been reported, such as the number of participants reached, number of partnerships developed, number of products/services sold, return on investment and communication materials produced and disseminated through printed and digital media (Short *et al.*, 2018). Such approaches are common in commercial marketing (Baker and Saren, 2010), but their use in measuring success in social marketing practice raises concerns. There is an ongoing debate about practitioners having a limited view of social marketing theory (Akbar and French, 2022), ultimately limiting their understanding of a broader perspective of success beyond reach and engagement. This suggests that practitioners' bias or approach toward social marketing may sometimes influence the notion of success (Liao, 2020a). For example, practitioners who understand social marketing merely as communication can limit their interpretation of success to only using communication to raise awareness for effective behavior change.

Measurement of success

Dibb and Carrigan (2013) distinguish the short- and the long-term measurement of success. In the short term, the measure of success is determined by the number of achieved behavioral outcomes. In contrast, long-term success depends on how many behaviors are maintained over time. Importantly, evaluations at the midterm of interventions can provide insights that ultimately enhance the achievement of behavioral outcomes (Dietrich *et al.*, 2019; de la Sierra-de la Vega *et al.*, 2022). Such behavioral outcomes can also be measured discretely during the intervention, particularly at the end, using summative evaluation techniques (Evans, 2022).

However, the argument is whether such monitoring and evaluation strategies should be described as measuring success.

Acknowledging the overlap between monitoring, evaluating and measuring success is imperative. Overall, monitoring and evaluation rely on effectiveness (Stead *et al.*, 2007), focusing on behavioral outcomes and understanding what happened during the implementation:

> Social marketing monitoring and evaluation aim to determine the effectiveness of campaigns in achieving their communication and behavioral outcome objectives. They seek to answer two questions: Did the campaign achieve its objectives? If so, how did it achieve them? (Evans, 2016).

Traditionally, monitoring and evaluation are ongoing processes (Truong *et al.*, 2021; Dietrich *et al.*, 2019; Hodgkins *et al.*, 2019), aiming to provide insights that ultimately make amendments and adjust the intervention based on the changing needs of the target audience (Dietrich *et al.*, 2019; de la Sierra-de la Vega *et al.*, 2022). For example, when impact evaluation is conducted, it aims to measure the leap from behavior change to health and social outcomes (e.g. improvement in health or quality of life). However, such techniques broadly do not go beyond process, outcome and impact evaluation (Weinreich, 2010).

McHugh and Domegan (2017) encourage social marketers to adopt a reflective stance in evaluating success, capturing the complex relationship, knowledge and networking between actors operating at different levels of interventions. While monitoring and evaluation provide insights into effectiveness that can be interpreted as success, some authors advocate evaluating how and why success happened rather than focusing on what worked well (Gordon and Gurrieri, 2014; McHugh and Domegan, 2017). These authors highlight the need to include multiple measurement groups in the evaluation process, such as participants/beneficiaries, researchers and stakeholders (NGOs and governmental bodies). This indicates that measuring success relies on the perspective of multiple actors and what they value in the social marketing intervention, other than achieving desired behavioral outcomes.

Success at the midstream, upstream and systemic level

As the debate on monitoring, evaluation and measuring success continues, some studies remarked that social marketing interventions were effective across various actors and settings. At the midstream level, the effectiveness was associated with:

- for example, coalitions with schools, universities, churches and workplaces;
- the active involvement of family and community members in activities and events; and
- organizational changes, such as the redesign of school curriculum to increase physical activity classes (Stead *et al.*, 2007; Wood, 2016).

Other studies showed that effectiveness could also be conceptualized by the upskilled proportion of people in the community (Rundle-Thiele, 2022) and the engagement with multipliers. These people have the skills to replicate the intervention's messages (Bastos *et al.*, 2022).

Overall, the term *effectiveness* at these levels refers to influencing policymakers:

- to gain their support for the development of the intervention;
- to enact policies to promote the desired behavior, for example; and
- to create healthier environments; for example, construct walking paths and station exercises in low-income suburbs (Stead *et al.*, 2007; Skerletopoulos *et al.*, 2020).

On the other hand, success is mostly obtained by having a holistic view of social problems and targeting multilevel societal actors (e.g. individuals, organizations, companies, governmental bodies, etc.) via tailored strategies and messages through a systemic approach (Domegan *et al.*, 2016). The systemic approach creates synergies between the different actors, whose decisions/actions ultimately will result in sustainable behavior change. An example of a systemic approach is the *Life of Health* campaign, which targeted policymakers, organizations and individuals to increase healthy eating and exercise. This campaign had positive results at the individual level, the involvement of universities and the upstream level (enacting local regulations to allow open spaces for exercising, thereby enabling continued uptake of the desired behavior) (Bastos *et al.*, 2022). The key aspect of succeeding with the systemic approach is the involvement of actors in co-creating the intervention from the early stages; this process helps accelerate the behavior change of individuals (Burksiene *et al.*, 2019; Skerletopoulos *et al.*, 2020; Kim *et al.*, 2021; van Hierden *et al.*, 2022).

Other examples of successful macro/upstream/systemic level interventions include Canadian anti-smoking intervention (Kennedy and Parsons, 2012; Flaherty *et al.*, 2020), and Vietnamese interventions in helmet use for biker riders, reducing smoking throughout Vietnam, reducing drink driving and increase the rate of consumers of fortified food (Truong, 2017; Flaherty *et al.*, 2020). These interventions influence the institutional norms of the system in terms of policy changes in the form of restrictions, enacting laws and regulations such as taxes and import duties on tobacco and alcohol, fines on drink and driving, etc. However, no evidence of consideration of structural or system change as success was noted.

Such examples expand on the capability of social marketing to develop multi-layered interventions targeting audiences at down, mid and upstream levels. An approach to designing multiple-level interventions is strongly evident in the broadening social marketing literature (Domegan *et al.*, 2016). Even though it is considered useful in systems thinking in social marketing, "there are so many interconnected levels of society involved that what to change and in what order becomes overwhelming" (Kennedy, 2015, p. 4). This multiple-level approach evidently offers greater social impact and reach and ultimately enforces behavior change; conversely, it diversifies the meaning of success. Expanding this, despite the nature of social marketing, i.e. social good, the connotation of success varies at down, mid and upstream levels. This resonates strongly with the notion of innovative thinking about behavior change at the downstream (individuals), midstream (community groups) and upstream (policymakers) levels (Kennedy and Parsons, 2014). However, when measuring success, greater attention must be given to individuals' voices and power relations between the down, mid and upstream levels.

Socio-cultural and critical perspectives of success

Understanding how culture shapes human action is key to developing successful social marketing interventions, given that it provides better insights into the complexity of behavior change (Spotswood and Tapp, 2010; Sutinen, 2022). Authors embracing socio-cultural theory posited a different interpretation of success in social marketing. For example, Spotswood and Tapp (2010) showed that in working-class communities in the UK, individuals were resistant to exercise because working-class culture does not support exercise, and the social norms of this social group are strong. These authors acknowledged that shifting cultural patterns is difficult and takes longer and recommended involving other disciplines for a successful outcome, such as public policy and public health, pushing for behavior change.

Expanding theoretical approaches in social marketing have shown evidence of the field's growth. These approaches include a hierarchical planning process (Weinreich, 2010) and stepwise guidance for designing social marketing interventions (Lee and Kotler, 2011). Other models moved beyond individual behavioral outcomes by focusing on value co-creation and citizenship (French and Russell-Bennett, 2015) and incorporating ethical consideration and behavior sustainability/maintenance (Akbar *et al.*, 2021c). A prominent critique of these planning approaches is that they only focus on the planning mechanism of interventions. In contrast, guidance on measuring success at individual, organizational and stakeholder levels is largely ignored. Other criticisms include that these approaches do not extend beyond the monitoring and evaluation mechanism; in other words, *what works well* in implementing the interventions? More work must be done in this area by extending these approaches to a singular view of success criteria, considering the existence of different paradigms and viewpoints on social marketing success in practice. A historical critique of social marketing shows a lack of critical debate and reflexivity (Tadajewski and Brownlie, 2008), especially for practitioners to reflect and acknowledge their bias (Campbell and Brauer, 2020; Akbar *et al.*, 2021b; Cook *et al.*, 2021). Such bias may influence the criteria used to measure success and the outcomes of social marketing interventions.

Finally, some authors identify that social marketing lacks non-Western voices and thinking in its critical discourse (Gordon *et al.*, 2016; Cateriano-Arévalo *et al.*, 2022). This is because most literature on documenting social marketing successes is published in the Western context (Cateriano-Arévalo *et al.*, 2022). There is a possibility that the success criteria used in the Western context may not work in the non-Western world. Examining a universal approach to measuring success would advance conversations, theory, research and practice to foster social good.

Summary of the literature

Success in social marketing depends on the nature of the intervention, targeted behaviors, program designers, funders and other stakeholders such as communities, offering a spectrum of various approaches to measuring success. The broadening literature acknowledges this diversity, resulting in continuously evolving discussions on success factors within a progressively growing field, requiring unified success criteria (Dietrich *et al.*, 2022). We believe a cohesive approach to measuring success would enhance the effectiveness of the field in dealing with a wider range of social and behavioral issues.

The literature also presents multiplicity in articulating success; for example, success is idiosyncratic, complex and multidimensional. This means that success can be about changing perceptions of undesired behaviors or engaging all (or a specific proportion of) the target audience with social messages on behavior change. It could mean changing the targeted behaviors in some proportion or maintaining the changed behavior. In some cases, success may mean meeting the needs of all (or some) involved parties and stakeholders. These are important discourses that should not be ignored. The field should be engaged with more criticism and better respond to such reproach, informing the research agenda for this study.

Methods

A qualitative research design using an open-ended questionnaire (Creswell, 2013; Maxwell and Reybold, 2015; Patten and Patten, 2018) was used to address the research objective. Convenience sampling was used to identify and select expert participants (Etikan, 2017; Etikan *et al.*, 2016; Wu Suen *et al.*, 2014). To understand how success is measured in current practice, participants were asked to reflect on the current practice based on their experiences of involvement in social marketing planning and delivery. After reflecting on their current experiences, participants were

asked to suggest how success should be conceptualized for future practice. The participants (who are experts in social marketing) were identified using popular social media such as LinkedIn (Basak and Calisir, 2014) and Twitter (Sibona and Walczak, 2012). Emails were also used to reach out to potential participants. The open-ended questionnaire was developed using Google Forms and was distributed online. The questionnaire was left open for three months following the guideline of ethical approval received for this study. A total of 48 participants completed the survey and were used for the data analysis.

Participants' profile

Most participants (33%) have more than 20 years of experience in social marketing, and 8% have 15–20 years of experience in the field. Similarly, 36% have worked in social marketing for 5–15 years. The remaining 23% have worked in social marketing for 1–5 years. In addition, 27% of participants classify themselves as academics working in social marketing, whereas 38% declare themselves practitioners. The remaining 37% have expertise in both social marketing theory and practice.

Our participants represent geographical diversity. Sixteen participants were from the US; six were from Canada, five were from the UK, three were from New Zealand and eight were from Australia. The remaining participants were from Kuwait, Switzerland, Spain, Israel, Brazil, Germany, India, Oman, Saudi Arabia, Jordan and China. All the participants had public health and/or social marketing background. The participants were involved in diverse interventions such as environmental change/protection/sustainability, messaging and strategy creation, salt intake reduction and indigenous health, social marketing theory, non-communicable diseases, vaccination, health and well-being, systems thinking, health and crime, methods/research, recycling, breastfeeding, cultural consumption, sustainability, violence prevention, nutrition and physical activity, behavior triggers, taxation, social and health inequalities, vocational guidance, gender issues, early childhood development, disease prevention and management, food waste behavior, injury prevention and energy, gambling and alcohol-related interventions.

Data analysis

Topic modeling is an unsupervised machine learning method that creates "clusters" through document analysis. The clusters, also known as themes, are generated through topic modeling based on the similarity of contents (Kherwa and Bansal, 2019). The optimal number of themes is decided based on the two statistical values (i.e. perplexity and coherence). Perplexity processes how a trained topic model forecasts new data; the lesser the perplexity score, the better the model. Conversely, coherence measures the semantic similarity between the clusters generated by a topic model (Bai *et al.*, 2021; Dwivedi *et al.*, 2020); the greater the coherence score, the better the model. For this study, the participants' responses have been put through the topic modeling process to generate themes of interest. A total of seven topic clusters were generated. After generating topic clusters, themes were developed based on keywords in each topic. The next section explores these themes and is followed by a discussion.

Findings and discussion

A – the practice of measuring success

This section focuses on the actuals of practice adopted in measuring social marketing success.

Variance in measuring success.

[. . .] it depends on who is doing the measuring [. . .].

The success of social marketing interventions rests firstly on the objectives set for each initiative and their associated measures. It is found that there is a high variance in how practitioners set objectives. There is a difference in their approaches to setting measures, depending on their roles and the time duration spent in such roles within a given organization:

> [. . .] program initiators might measure success in terms of a lack of resistance to the program, positive media coverage gained, or that they like the creative executions [. . .].

The above quote indicates that communication teams or campaign designers may focus purely on short-term aspects of the interventions when measuring success. Success is often measured only in inputs, activities and outputs. For example:

> [. . .] when outcomes are reported, they are too often short term only (one year or less).

Participants also mentioned that success is usually measured by:

> "the uptake of a new behavior" or by "the abandonment of undesirable behavior"

It is typically measured for the short term with no mention of long-term success measurement. This is an interesting insight as the conceptualization of success in the long term is based on how many behaviors are maintained over time (Dibb and Carrigan, 2013). However, in this case, the measurement of success in the long term among practitioners is seldom undertaken. One reason could be that few are in the roles for long enough for long-term behavior change to be part of their measure of success. Additionally, the sample of this study involved experts from six different sub-continents playing various roles in different organizations, each with a different purpose, setting objectives of interventions. Hence, measuring success is *contextual* to the case of every individual and the purpose of their organization.

Role of funding. Participants also believe that *budgetary provisions* are a good indicator of success, with previously successful campaigns receiving a significantly higher budgetary allocation. If the funding team measures success, they mostly focus on the commercial aspects of the interventions. This is one area wherein prior literature (Liao, 2020a) has argued that the availability of financial resources largely determines the campaign's success. The participants also argued that adopting a committed financial strategy early in the social marketing campaign can lead to adopting several criteria to measure success:

> When budget allows, success is measured with process measures, outcome measures and behavioral measures. When it does not allow, often only outcome measures.

Another reason practitioners conceptualize success in the long term but may not measure it in the long term may be the paucity of financial provisions as the campaign prolongs. Measuring success requires practitioners to focus on the process, the outcome and behavioral measures. However, participants argued that such an approach could lead to escalated costs, which prevent them from adopting this method and forces them to focus mainly on process outcomes that can be used to justify their actions to funding bodies by highlighting numbers or statistics that signify *action* but not necessarily *outcome* in terms of behavior change:

> Many try to quantify it but do not have sufficient funding to conduct a valid evaluation, so measures focus more on process objectives (i.e. how many people were reached, how much attention the campaign received, etc.) than outcomes.

Budget allocation and availability are key factors in determining how effectively success is measured, particularly in the long term. The financial strategy of campaigns hence determines, to a large extent, the gap between success conceptualization versus measurement among practitioners (a detailed discussion follows). The geographical diversity of the participants of this study highlights that in emerging economies, the availability of funding is a constraint for practitioners. However, these budgetary restrictions should not stop social marketers from developing a dialogue with funders about the significance of measuring success and future impact. The result of a lack of sustainable funding is that social marketing has developed a short-term focus, explained in the following theme.

Short-term focus. As discussed in the previous theme, practitioners sometimes focus on short-term convenience statistics. One indicator of short-term success is *engagement*. *Reach* and *recall* are used as indicative factors of the rate of engagement of a particular social marketing campaign:

> High reach and high recall of messages.

The participants cited several objectives while explaining their experience of measuring success. For example, *exposure to the intervention*, *increased awareness*, *acceptance of desired behavior* or *successfully reaching out*, in some cases, to the target audiences. The *reach* aspect involves the number of *lives touched* without delving into whether the consequent behavior changes were long-term (or adopted at all). In the case of many participants, it is not the desired behavior change but the penetration of their campaign that is used as a success determinant. This is evident from our findings wherein objective, measure and campaign recall were higher frequency codes, strengthening this particular theme.

The medium via which the social marketing interventions are carried out is vital, as it can determine the objectives and measures. For example, campaign/message recall can be one sufficiently measurable metric via recall uptick. Some participants believed that the extent and nature of media coverage determine the *engagement level* with a particular campaign, which can be useful. The level of resistance encountered by each program also determines the *acceptability* of a particular campaign and is used by some practitioners to measure success. The data demonstrate these measures are centered around the *level of engagement* each campaign generated and the *campaign's reach*. The medium allows practitioners to evaluate the awareness level reached, dialogues initiated and perception/attitudinal change:

> [. . .] these come in many forms (knowledge, attitude, behavior change). But it can also extend to how many people we have reached, visited our project website, engaged with our program, etc.

Our evidence indicates that practitioners focus more on engagement and acceptability and less on behavior change. The findings suggest a lack of clarity in understanding the "process" that leads to behavior change or a willingness to ignore the same due to financial constraints.

Social media is argued to be an effective medium due to its technological enabling effect, allowing practitioners to use algorithmically generated insights to measure success. Participants have, however, argued that this approach could become problematic, as it ignores the long-term behavior change at the core of social marketing:

> [. . .] they might look to short-term data [through social media] like campaign recall or favourability [. . .].

Though this may be relatable only for those who had either short-term, voluntary or part-time social marketing roles, which did not allow them enough time to measure long-term success, again, similar to how a lack of financial strategy may hinder the measurement of long-term social marketing success, the use of technology by practitioners is also geared toward the short term. The interesting part is that the short-term focus is not by design but due to the constraints of the reality of practice, as evident below:

> [. . .] often short-term political/organizational thinking expects behavior change to happen quickly and does not invest sufficient time or resources to develop robust monitoring and adaptive response capability.

The pressures of the real world of practice being fast result orientation and paucity of funding are the major factors that have led to practitioners adopting short-term success measures. The findings point towards practitioners sometimes giving more importance to convenient *perception building* via statistics aimed at pleasing the financial and political/organizational stakeholders rather than achieving behavior change outcomes that benefit society. This can also be linked with the overall objectives of the interventions; for example, one participant mentioned:

> By the adoption of the intended behavior, it's context-dependent. It may be possible to count the number of people who phone a helpline or take up the opportunity to get a vaccine, for example. There may also be other ways of measuring success, e.g. fewer road traffic accidents due to a road safety campaign. But all the intended measures of success should be built into the objectives for the program so that measurement is possible.

A mindset that values long-term measurement of success is significant, but there is insufficient understanding of how to do this. The findings show a good understanding of possibilities but lack actual actions and efforts in measuring long-term success.

The discussion on using tools other than social/digital/earned media and metrics/statistical tools (such as Andreasen, 2002, benchmark criteria) for measuring the success of social marketing efforts is also evident. Although these tools allow long-term measurement, the effectiveness of a tool is only as good as the intention of its user. The findings suggest that the tools are geared towards short-termism in measuring success; however, the conceptual understanding of success among the participants paints an alternative picture, as discussed in the following theme.

B – the conceptual understanding of measuring success

While Section A focuses on the reality of practice adopted by participants in measuring success in current social marketing practice, Section B emphasizes the conceptual understanding of measuring success for future practice.

Evolving practice of measuring success. In discussing the nature of their practice of success measurement, the participants were equally candid when discussing their concept of success. It was refreshing to observe that the participants are beginning to note the aberrations in their current practice of measuring success and moving towards a discussion on how the practice should evolve. In this regard, they refer to their conceptual understanding of success, which is discussed in this, and the following themes:

> I would like to say that in the last decade, there has been a push to use social marketing benchmark criteria to succeed in interventions. So another form of measuring success is how many criteria we have used in our intervention.

Similarly, the effectiveness of using surveys, interviews and focus groups with the target audience to measure the level of behavior change is strongly echoed, as stated below:

> Seeing people move through the stages of change over time as a result of our messaging.

At the same time, the role of such approaches is also questioned. For example:

> [. . .] I believe in the change, but when I see the difference between the cultures, I still think there is something deeply we have to change more than the numbers.

The findings demonstrate that success is often not measured objectively in practice. Many practitioners try to quantify it but do not have sufficient funding to conduct a valid evaluation (as discussed in Section A), and second, do not have sufficient clarity of the long-term success measuring process. Therefore, the measurement focus remains on shorter-term objectives, such as how many people were reached, how much attention the intervention received and other promotional aspects, rather than evaluating the outcomes and impact of the intervention. However, this theme points out a larger picture, which signifies the dawning of long-termism among the participants. Although long-term measures of success are not evident in the participants' practice, it is clear in their conceptualization of measuring success in future practice.

Dialogue development and social proof.

Success is the achievement of proposed aims at an individual and socio-ecological level in social marketing intervention.

It is observed that success in social marketing is measured in two ways:

(1) At an individual level, success happens when targeted individuals adopt the proposed behavior or have the desire to adopt the proposed behavior.

(2) At a socio-ecological level, success occurs when social actors support social marketing intervention to create conditions to adopt the proposed behavior.

In such cases, success is measured beyond reach, engagement and awareness.

As discussed in the previous section, *increased awareness* and *engagement* are the initial focus areas of success measurement, which involves the practitioners focusing on broadening the awareness level of the campaign among the target audience. An example of this may be the campaign recall uptick. While awareness does not lead to behavior change, the latter is a success factor (albeit intangible) of the awareness campaign, yielding a result. For example, whether an anti-smoking advertisement has created sentiments of anti-smoking behavior among the target audience could be measured. The next downstream stage involves individuals acting to change their behavior. This is a tangible factor that may vary across individuals, ranging from a first attempt at adopting changed behavior, making a related purchase that aids that behavior change or making inquiries with the campaign body for further details or support. An example of this action the practitioners give is the *dialogue with social marketing actors*, a stage wherein individuals initiate discussions around the behavior change among family or friends:

> Meeting the audience where they are and providing clear, actionable behavioral guidance that is easy and popular (social proof), leading to the desired behavioral outcome.

At the midstream stage, which involves coalition with wider stakeholders, for example, one's family or friends (McHugh and Domegan, 2017), the individual has reached a mental state wherein individual-level understanding has been gained regarding the perceived benefits of the behavior change:

> Intended action is occurring and is evident at a larger societal scale.

Social proof signifies the involvement of social actors who endorse or support a particular campaign or the behavior change attempts of individuals. This indicates the diffusion of the social marketing concept at a socio-ecological level. The penultimate stage involves many individuals who have passed through the earlier stages, successfully overcome failed attempts to change behavior and *sustained the changed behavior*. Similarly, a *policy change* at the upstream level (McHugh and Domegan, 2017) occurs when public bodies and governments enact supporting mechanisms and policies at the macro level based on the evidence of sustained, successful behavior changes.

Behavior change as a measure of success. Interestingly, behavioral change, central to social marketing conceptualization (Gordon *et al.*, 2016), is neglected when measuring social marketing success (as observed in Section A of the findings). This theme discusses the rationale provided by the participants behind why it is neglected and the complexity of measuring behavior change. Although conceptually ideal, the difficulty of using behavior change as an objective cannot be associated with an ideal measure. The different intervention objectives can be objectively and statistically determined in the case of an offline or an online campaign. For example, the quote below highlights that several practitioners using a *statistical* approach may cause falsification or an illusion of success:

> [. . .] often just statistically significant changes that might not have a true impact on larger outcomes [. . .].

While the subjective nature of behavior change creates complexity for practitioners regarding its measurement, it is argued that it remains the ultimate objective of social marketing and should not be traded off with short-term success measures; however, our findings suggest otherwise. This is because *measuring success* is vaguely presented in social marketing theory and practice. In addition, the role of funders in influencing success criteria and political organizations' pressures is repeatedly noted in our findings. Funders often prefer measures of engagement and reach rather than measuring the actual behavior change (as discussed previously).

The results further demonstrate the misperception of success criteria among social marketers. Insights gained in the current study highlight the incongruence between how success is currently measured and how it should be measured in future practice. When reflecting on the current practices used to measure success, participants focused on the significance of the engagement level of the target audience. At the same time, gauging the changes in the behaviors is completely ignored. For example:

> [. . .] rare to see behavior change measured.

The same group of participants, on the other hand, suggests that success in future practice should focus on the *longer-term outcomes*, as evident in the quote below:

> Beyond looking at success metrics (usually limited to engagement rather than including outcomes). I would argue that process and outcomes evaluation are a huge part of success.

These outcomes are attributed by the participants to be *sustained behavior changes*, as evident below:

> The ability of strategies to result in long-term sustained desired behaviors.

The findings suggest a paradox in the conceptual thinking and actual measurement of success. Further interpretation and probing of our findings suggest that participants look at social marketing success as a process with a circuit that allows them to refine their success

measurement practice as new realities emerge. This is discussed further in the following theme.

Success is seen as an ongoing process.

> I would define success in social marketing as rapidly learning and adjusting based on what works (or does not) and learning what to do differently next time.

Dietrich *et al.* (2019) and De la Sierra-de la Vega *et al.* (2022) argue that the monitoring and evaluation process of social marketing involves making amendments and adjusting interventions. The above quote signals a similar understanding among practitioners that success in social marketing may be a (longer-term) process. It was interesting to note that while most of the findings pointed towards the short-term focus on measuring success, the conceptual view is still that of a longer term. To interpret the findings, the often flawed practices undertaken in an environment of real-world constraints allow practitioners to point toward the need for longer-term measures. This is a departure from the findings reported in the earlier half of the discussion, which agrees with the view of Akbar and French (2022), who argue that practitioners have a limited view of social marketing beyond reach and engagement. Most participants view success as a continuous process since behavior change may have varied gestational periods due to its individually specific nature. Continuous learning, determining what works and what does not and continually improving one's approach are the keys to success. It is interesting to note that instead of viewing success as one unit, participants view it as various degrees of success. For example:

> Success can also be a matter of time and the gradual accretion of other factors.

The participants also view success as individual or socio-ecological, wherein individual success is determined:

> [. . .] when targeted individuals adopt [the] proposed behavior or have the desire to adopt [the] proposed behavior.

Socio-ecological success is seen as:

> [. . .] when social actors support [the] social marketing intervention to create conditions to adopt [the] proposed behavior.

The data provides a dichotomy between social marketing success, seen as an absolute, versus social marketing success, seen as relative to wider social actors. The data also suggests that social marketing success is viewed in various degrees or levels, with complete behavior change being the ultimate goal:

> To what extent did this facet of the program induce the change we wanted it to induce?

While the objective is to reach the ultimate goal, our participants have indicated that the journey is to engage in continuous learning, incremental improvements and maintaining resilience. As argued by the practitioners, the components of the findings and the gaps lead the authors to propose a two-stage taxonomy to measure and overcome the issue of the limited view of social marketing among practitioners beyond reach and engagement.

Proposed taxonomy

The contradiction between how practitioners conceptualize success and how they measure it is highly interesting. The short-term focus due to financial constraints and political/organizational pressures leads to a short-term result orientation, evident in our findings. Due to its measuring complexity and long-term gestation period, behavior change is not a preferred objective for success. It is, however, viewed as extremely important by the same

sample when conceptualizing success. This inconsistency is alarming and should be a topic of a more detailed study. This aspect also emerges as a key gap between social marketing theory and practice. In the literature, Andreasen's (2002) criteria are commonly cited as one of the most effective in leading to successful behavioral outcomes. However, as Suggs and Speranza (2022) argued, the criteria are mainly operative in helping categorize what social marketing is and is not. As per our study, either the plethora of existing frameworks and criteria (Akbar *et al.*, 2021c) have not influenced the practice to the desired extent, or there is an urgent need to develop studies such as ours which explore how social marketing practice is undertaken globally to understand more deeply the gap between what is theoretically argued and what is practiced in reality. The relevance of the existing frameworks needs to be explored to understand whether the issue is obsolescence/lack of relevance or the maturity of practice in various social contexts.

Various authors have identified a need to unpack practitioner-centric elements that contribute to the process of behavior change (Willmott and Rundle-Thiele, 2022) and a need to present benchmarks of the process that will lead to the increased likelihood of behavior change (Aceves-Martins *et al.*, 2016; Xia *et al.*, 2016). Similarly, the observation of Wettstein and Suggs (2016) argues that the presentation of procedural factors enhances the likelihood of behavioral outcomes. This study advances these conversations further and proposes a two-stage taxonomy for understanding success in social marketing practice (Figure 1).

The proposed taxonomy emerges based on the two stages in which we categorized our findings:

(1) how success is measured in current social marketing practice; and

(2) conceptual understanding of what success means for future practice.

In terms of measurement, the findings do not provide any evidence that practitioners measure success beyond reach, awareness and engagement. In conceptualization, however, dialogue with social actors, social proof and behavior change gain prominence. The authors have picked up the components identified by participants in their data and set these as benchmarks for practice (Figure 1). These benchmarks are placed across the perceptive divide of social marketing success measurement and conceptualization. The resultant taxonomy combines the puzzle pieces by bridging the divide and clarifies that success in social marketing is an ongoing and contextually dependent process.

While Stage A is currently evident in practice, the authors argue the need for Stage B to be incorporated into current practice if social marketing success is to be measured in its true sense. For this to be a reality, we include a continuum within Stage B ranging from change in targeted behaviors to sustained change in behaviors. Policy change is included as an

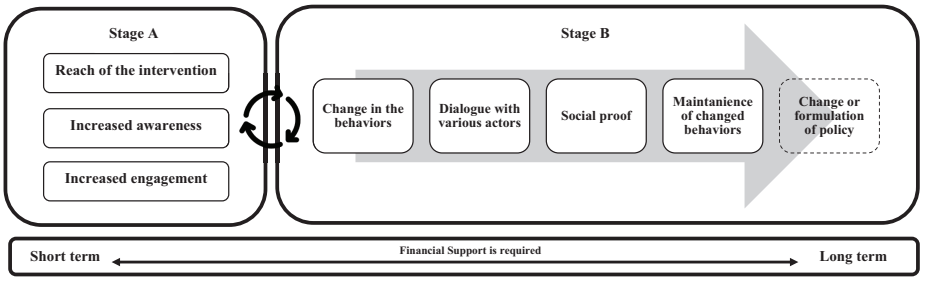

Figure 1.
Two-stage taxonomy for measuring success in social marketing practice

Source: Authors' own work

outlier in a dotted box. Although our data do not directly point at policy change as the ultimate goal, policy change occurs at the upstream level (McHugh and Domegan, 2017) when public bodies and governments enact supporting mechanisms and policies at the macro level based on the evidence of sustained, successful behavior changes. For better funding support (particularly from public bodies that are policy-oriented), social marketing practitioners need to measure success in terms of sustained behavior change (long term) and not in the short term (Stage A). The evolution of practice in this regard will allow policymakers to better inform their policy from practice that leads to meaningful outcomes in society. Policy bodies will benefit from better practitioner insights on various campaigns and can amend and adapt their policy to, in turn, make practice more efficient and successful. The authors are taking an inductive stance when including policy change as an outlier by taking a broader view of the literature (such as Kennedy and Parsons, 2012; Truong, 2017; Flaherty *et al.*, 2020) from the lens of our findings.

Funding bodies need to consider a sustainable, long-term financial strategy when funding programs; this will allow practitioners to measure long-term behavior change as an outcome and reduce the emphasis on short-term results. Therefore, funding must be consistently maintained across Stage B. The funders' role and power, critical to social marketers' short-term view of measuring success, must change. While the conceptualization of social marketing success has behavior change as the ultimate objective (Dibb and Carrigan, 2013), the practitioners' view of policy change/formulation, as found in this study, maybe the incentive required to refine their success measurement practice.

Based on our findings, we believe that the measures of inputs and reach would feed into the awareness-building stage. Measures of engagement would feed into actions leading to behavior change and dialogue with social actors who support engagement. Similarly, output measures would map to social proof, and outcomes measures would map to sustained behavior change and policy change or formulation, wherever necessary.

Conclusion

The study finds that social marketing success needs to be broken down into more frequent battle wins, with a view that ultimate behavior change means winning the war. Success and measures should be devised specifically at each stage of the taxonomy to give the practitioner scope to learn and change the social marketing program. Appropriate metrics should be adopted to identify the achievement of each stage. Funders must adopt a longer-term view and remain patient and resilient while accepting that true social marketing success is a waiting game. The budgetary provisions should be consistent with this long-term view. This, in our opinion, will provide the necessary space for practitioners to objectively measure process, outcome and behavioral measures and determine whether the program was a holistic success. At the latter stages of the taxonomy, practitioners must consider a broader stakeholder role in social marketing success. While considered the ultimate objective, positive behavior change needs to be repositioned prior to policy change at the socio-ecological level, as found in this study.

Limitations

This study has some limitations. One limitation is the sample size. Even though a sample of 48 participants is considered satisfactory for a qualitative study (Bogner *et al.*, 2009; Flick *et al.*, 2018) based on participants' experience in the subject under discussion (Vasileiou *et al.*, 2018), our findings cannot be generalized. Yet, participants' responses still provide valuable insights in line with qualitative research objectives, particularly as the collected data draws

upon notable experts in social marketing. In addition, the selected sample accurately represents a small, globally disseminated social marketing community (Lee, 2020).

Moreover, the sample includes mostly Western scholars with some representations from the Middle East (such as Saudia Arabia, Jordan, Kuwait, Israel and Oman) and Asia (such as India and China). This can be recognized as a limitation, considering social marketing is criticized for Western predominance in its scholarship (Gordon *et al.*, 2016; Cateriano-Arévalo *et al.*, 2022). Further studies can adopt a more non-Western lens on knowledge to evaluate success.

Another limitation of this study is that our findings solely represent the view of social marketing academics and practitioners. Other actors involved in social marketing interventions, such as beneficiaries and/or stakeholders, may have a different perspective on success. For example, social movements tend to associate the success of social protests with structural changes in society. This notion of success is aligned with their political view of social life (Hanna *et al.*, 2016).

Finally, we acknowledge that our two-stage taxonomy to understand success in social marketing needs validation. This could be achieved by encouraging social marketing practitioners to adopt a longer-term approach to understanding and looking for success during and at the end of their social marketing interventions. We believe that one important step is distinguishing the measure of success from success *per se*.

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Corresponding author
M. Bilal Akbar can be contacted at: m.akbar@ntu.ac.uk