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50 years of Social Marketing: Seeding Solutions for the Future

Abstract

Purpose

This paper looks back to look forward, through a synthesising social marketing literature over the last fifty years, and delivers a set of guiding tenets to propel social marketing's agenda forward.

Design/methodology/approach

Across three strands, this paper amalgamates theoretical and practitioner evidence from social marketing. This synthesis commences with a review, summary and critical discussion of five decades of social marketing research. Across strand 2 and 3, we review 412 social marketing interventions reported across 10 evidence reviews, and 238 case studies.

Findings

This paper demonstrates social marketing's use of fundamental marketing principles and capability to achieve behaviour change outcomes. Social marketers have built frameworks and processes that non-profit organisations, government agencies and policy makers seeking to enact change can utilise. This paper delivers 5 tenets that summarise the findings of the three strands and delivers research priorities for the next 50 years of social marketing research to drive the field forward.

Research limitations/implications

Drawing on five decades of learning, this paper proposes research priorities that can be applied to refine, recalibrate and future-proof social marketing's success in making the world a better place.

Practical implications

This article demonstrates the value of social marketing science and helps bridge gaps between theory and practice and further strengthen social marketing's value proposition. This paper provides confidence that money invested in social marketing programs is well spent.

Originality/value

This paper delivers a forward-looking perspective and provides social marketing academics and practitioners with confidence that it can assist in overcoming society's most pressing issues. The paper encompasses key social marketing literature since it was founded 50 years ago. Five tenets will guide social marketing forward: (1) evidencing marketing principles (2) operationalisation of processes, principles and activities (3) implementing systems thinking (4) creating and testing marketing theory, and (5) guiding a new social marketing era.

Keywords

Social marketing, marketing, 50 years, umbrella review, tenets.

Introduction

At a time when marketing has been encouraged to engage in positively influencing the world's most pressing issues (Chandy et al., 2021), social marketing has grown in prominence, demonstrating the capacity to help solve some of the world's most pressing social (McKenzie-Mohr, 2000), health (Kubacki et al., 2015b), environmental (David et al., 2019) and economic issues (Kotler and Lee, 2009). Garnering hundreds of millions of dollars of investment annually in the United States alone, social marketing delivers evidence of the capacity of marketing to improve the standard of living for all citizens by co-creating value at all levels within a socio-economic system (Luca et al., 2016; Rundle-Thiele et al., 2021; Venturini, 2016). Social marketing has gained prominence globally, demonstrating an ability to bridge marketing scholarship and practice (Dibb and Carrigan, 2013; French et al., 2011; Kassirer et al., 2019). Key to social marketing's success has been its adoption of multi-disciplinary approaches and the desire to look beyond its parent discipline of marketing. As emphasised by Fehrer (2020), nurturing research that extends mainstream marketing and builds ties with other disciplines offers insights and solutions that facilitate growth in the marketing domain. Attached to real world phenomena, social marketing understands that resolution of any 'problem' most often requires change at all system levels (Anibaldi et al., 2020) and acknowledges the complexities and inherent challenges needed to drive systemic change (Domegan et al., 2016; Rundle-Thiele et al., 2021). Social marketing has gained prominence for its ability to bridge theory and practice and offers an approach benefitting funding bodies, partners and other stakeholders, individuals and the communities served (Kassirer et al., 2019).

Drawing on decades of social marketing practice and learning, the aims of this paper are twofold. This paper looks backwards by synthesising strands of social marketing theory

and practice, to demonstrate how social marketing has developed over the last five decades. Specifically, the first strand (*Evolution, Definition and Scope*) takes a temporal view of social marketing, to examine how the discipline has transformed and evolved. The first strand aimed to highlight how much social marketing has moved beyond its original marketing origins by drawing and integrating theories, frameworks and processes from other disciplines to better enact change. This strand also sought to demonstrate how social marketing has advanced to include important concepts such as systems thinking, and ethical and sustainable approaches to bring about long-term sustainable change via strategic partnerships across multiple layers in the ecosystem.

In the second strand (*The Scholarly Social Marketing Evidence Base*) an umbrella review of existing systematic literature reviews was conducted to assess the application of social marketing principles. This aimed to understand the geographic spread of social marketing, and breadth of application across domains of social issues (health, social and environmental). Importantly, this strand aimed to systematically identify and critically analyse the evidence to deliver a strong contribution to the field of social marketing. It adds to existing evidence showing that the application of more marketing principles delivers additional behaviour change (see Carins and Rundle-Thiele, 2014; Xia et al., 2016; Firestone, 2017).

The third strand (*The Social Marketing Practitioner Evidence Base*) summarises social marketing's practical application to solve some of the world's most pressing and complex problems. Given social marketing's prominence in the NGO, government and charity sector, case studies reported across two major practitioner databases were analysed to examine how they had applied social marketing principles. As well as examining geographic spread and application, this strand aimed to examine how social marketing principles were being adopted into practice beyond the academic literature.

Collectively, the three strands provide five tenets to guide social marketing practice and research into the next decade. By drawing from 50 years of research and practice, this paper provides a forward-looking perspective to enable academics and practitioners to positively shape the future of social marketing.

Strand 1 – Evolution, Definition and Scope of Social Marketing

Background

In its 50th year, social marketing is characterised by growth in relevance, transformation and continued evolution. As a field of science situated at the edge of marketing, social marketing lore has been working across scientific fields to understand how and when people (do and do not) change their behaviour. Social marketing scholars and practitioners have spent considerable time drawing on theories and models from well-established disciplines such as psychology, behavioural economics, sociology, anthropology, political science, and health sciences (Hastings and Domegan, 2014). This should not be interpreted as a sign of confusion, but rather as an indicator of a sophisticated and reflexive discipline that seeks to refine and recalibrate itself in light of an ever-changing marketplace driven by organisations, government and customers.

It is important to review the history and evolution of social marketing in response to continued debates about the discipline's parameters and scope (iSMA et al., 2017). A critical review of the discipline's evolution and transformation since its inception helps to understand the scope of social marketing's application along with important boundaries. In particular, the latter seems to have been rarely discussed given that social marketing is often portrayed as a solution to many – if not all – of the world's wicked problems (Andreasen, 1994). However, there are limits to social marketing and it is important to continue the debate around what

social marketing is in theory and practice and what it is not. The central premise of this article is that social marketing plays an important role in helping solve some of the world's biggest health, environmental and societal issues. Yet, if existing issues of definition and domain are not adequately resolved there remains the potential for misuse and the discipline's effectiveness can be compromised by theorists and practitioners.

Method

Definitions within the 293 articles published in *Social Marketing Quarterly* (up to volume 26) and *Journal of Social Marketing* (up to volume 10), were retrieved. These are the two social marketing journals that have risen to prominence through specialising in advancing social marketing research and practice and were therefore deemed as a suitable starting point to extract definitions. In addition, searching was conducted to identify and examine other definitions cited in the included studies which ensured that definitions published in other marketing journals (such as *Journal of Marketing*, *Journal of Marketing Management*, *Journal of Public Policy & Marketing*, *Journal of Business Research*, and many influential textbooks) were identified. This process also identified the sources of definitions (e.g.: social marketing textbooks and associations). Additionally, informal interviews and discussions with social marketing scholars were conducted to identify and cross check that important literature, associations and other relevant organisations (e.g.: Institute for Social Marketing, Social Marketing @ Griffith, LASMA, AFSMA, SMANA) were not omitted from the review. Only explicit definitions of social marketing were included (i.e., general statements about what social marketing is or summaries of citations were not included). In total, 28 unique definitions of social marketing were selected. From these, 16 definitions were selected to represent four key social marketing periods (i.e. four definitions per period). The definitions were selected based on their validated impact on the discipline. For example,

definitions were considered to have had an impact if they were published in seminal social marketing articles, if they had received a number of citations, or if they had been defined through consensus by recognised social marketing associations.

Data were compiled and analysed by two independent coders and later merged into a single criteria table. The criteria table consists of the established eight social marketing principles (NSMC, 2009) and the global consensus on social marketing principles, concepts and techniques (iSMA et al., 2017). Three researchers independently analysed each definition and identified category relevance. Content analysis of concepts appearing in the definitions set by social marketing experts and social marketing associations allowed for critical reflection on the evolution of social marketing from 1971 to 2021. We then commenced identifying differences and similarities across four key periods that describe the definition, evolution and scope of social marketing. These four eras are discussed next, and an overview is presented in Table 1.

---Insert Table 1 about here---

Results and Discussion

Marketing for Social Good Era (1969 – 1989). Some social marketing scholars would argue that social marketing existed well before its first official academic definition emerged in 1971 (see for example Simon, 1968). Kotler and Levy (1969) were close when they mention, “*a great opportunity for marketing people to expand their thinking and to apply their skills to an increasingly interesting range of social activity*” (p. 10). In its early days, social marketing remained very true to its parent discipline of marketing, and definitions and research from that era demonstrate a focus on the marketing mix and

exchange concept to persuade individuals to change. Language was more oriented towards commercial marketing (e.g.: persuade, sell, influence) and in today's era, may be interpreted as calculating. Interestingly, only one definition (Kotler and Roberto, 1989) mentions the outcome of behaviour change, despite Kotler and Zaltman (1971) reminding us that social marketing draws, "*heavily on the behavioural sciences for clues to solving problems of communication and persuasion related to influencing the acceptability of commercial products and services*" (p. 5). Kotler (1975) was the first to mention the important notion of voluntary behaviour change that underpinned social marketing exchange offerings. This era also saw the marketing principle of segmentation emerge and the necessity to move beyond one-size fits all approaches (Kotler, 1975) that dominated public health and social cause messaging.

Interestingly, no definition mentions the marketing principles of theory and competition and there is a general underrepresentation of process and planning terminology. Lefebvre and Flora (1988) were the first to introduce key principles of social marketing, demonstrating how they are essential in the process of designing social marketing programs. While a process was mentioned in their work, it nonetheless exhibited a limited sequential application (e.g.: exchange should be featured later in the process), with certain components appearing redundant (e.g.: channel analysis is part of the marketing mix) and theory mentioned only as part of the exchange. Bloom and Novelli (1981) outlined the unique challenges that social marketers were starting to confront when practicing social marketing. These challenges ranged from a lack of resources and access to target populations, public stigmatisation perceptions around market segmentation, and difficulties formulating product concepts and building long-term marketing programs when challenged with short-term funding cycles (Bloom and Novelli, 1981). This marked an important shift towards pin-

pointing the challenges in simply copying commercial marketing principles to complex social challenges. Finally, Lazer and Kelly (1973) were the first to stretch the scope of social marketing to the marketing of public policies and to propose social marketing as a suitable means to enhancing economic ends. Empirical work at the time was, however, lacking.

Voluntary, individual behaviour change era (1990 – 1999). In the 1990s, social marketing deepened its focus and voluntary behaviour change became more prominent (Rothschild, 1999). During this era social marketing's unique challenge and core difference to commercial marketing was the fact that it often seeks to modify (e.g.: reduce waste), abandon (e.g.: stop drinking) or maintain behaviours (e.g.: donating to charities) (Lee and Kotler, 2016). Some of these behaviours are deeply ingrained cultural norms (Frese, 2015), addictions (Sussman and Sussman, 2011) or common pleasurable social activities which makes it harder for social marketers to enact change. A second major difference was highlighted in this era – these complex issues are often tackled with limited resources, or minimal resources compared to that of commercial marketing. The era emphasised that when a social marketing program is aiming to solve a complex social, health or environmental issue there must be a clear exchange offering present if people are to buy into the idea, product, service or movement. This translates into one of social marketing's biggest challenges, the notion of, "*nontangible products-ideas, attitudes, lifestyle changes*" (Lefebvre and Flora, 1988, p. 300). This voluntary individual behaviour change era also demonstrated a shift in understanding towards more rigorous planning and a focus on the end goal, that is, voluntary individual behaviour change (Albrecht, 1997). Additionally, the necessity of program evaluation was highlighted (Andreasen, 1994). Definitions in this decade highlighted the commercial origins of social marketing and focus on individual behaviour change efforts.

This era also marked an attempt to better guide social marketers in program design. Andreasen (1994) described six principles that became widely accepted as the benchmarks for a social marketing approach: behaviour change, audience research, segmentation, exchange, marketing mix, and competition. These principles demonstrate how social marketing scholars were attempting to remind people of the origins of the discipline, and to ensure marketing concepts were incorporated into social programs. Andreasen's work helped to further elevate social marketing's prominence. Given the wide-ranging popularity and expanding application of social marketing approaches to issues often addressed in other disciplines, this era marked the need to distinguish social marketing from other disciplines such as education, health promotion and communication (Andreasen, 1994). Thus, more literature emerged highlighting what social marketing should entail. In fact, in the same year as Andreasen published his six benchmarks, Walsh et al. (1993) published a paper featuring nine criteria. These share strong overlaps with Lefebvre and Flora's (1998) set of components, with the key difference being that Walsh et al. (1993) do not explicitly mention exchange in their criteria nor segmentation and targeting. In addition, while the marketing mix is explicitly mentioned, there remains a stronger communication focus (Walsh et al., 1993).

The era concluded with a seminal conceptual paper by Rothschild (1999) that highlighted the distinction between marketing, education and law. The author described the purpose of marketing as offering, "*a direct and timely exchange for a desired behavior*" (p. 25). The paper also draws specific boundaries for the role that social marketing plays in behaviour change and where other fields such as education (i.e.: messages that inform voluntary behaviour without immediate reward or punishment) and law (e.g.: using coercion

to achieve behaviour change in a non-voluntary manner) play a more prominent role (Rothschild, 1999).

Planning into Action: Process Orientation Era (2000 – 2009). As a result of the growing complexities in social, health and environmental problems, greater emphasis was placed on developing a systematic process view of social marketing during the 2000's. With social marketing gaining credibility and attention in tackling complex and wicked social, environmental and health problems (McKenzie-Mohr, 2000), increased discussion emerged around the principles, processes and benchmarks for developing social marketing programs (Andreasen, 2002). While earlier frameworks had focused on social marketing as the promotion of ideas (Lefebvre and Flora, 1988), the development of the benchmark principles firmly positioned social marketing as a behaviour-change focused discipline (Andreasen 2002). This approach also emphasised the idea that advertising and communication comprised just one element of the marketing mix.

Andreasen discussed the importance of, and challenges associated with, evaluation but did not include evaluation in his framework (Andreasen, 2002), despite being featured heavily in his initial framework (Andreasen, 1994). Andreasen's six criteria, when first penned, aimed to give social marketing a clear structure, to distinguish it from other approaches (e.g.: public health), and to help propel the discipline into another phase of development. These criteria continue to be immensely useful for both those performing and those evaluating social marketing. Andreasen's criteria have been used widely to determine how well the principles of social marketing are incorporated into programs that are seeking to change behaviour (Stead, Gordon et al., 2007; Luca and Suggs, 2010; Kubacki, Rundle-Thiele et al., 2015b; Kubacki, Rundle-Thiele et al., 2015c). In other words, these criteria are

used to determine how congruent an intervention is to the ideal form of social marketing. They also help to filter out interventions that may not be considered social marketing, even if they are labelled as such, before taking the next step and critiquing how effective social marketing interventions have been in changing behaviour or impacting a given social issue.

In recognition of the importance of theory use and the development of actionable insights in behaviour change programs, French and Blair-Stevens (2006) built upon the six social marketing principles to further include theory use and insights. These are used by the National Social Marketing Centre to provide a framework for developing social marketing programs. The eight criteria represented the 'key principles' of social marketing, and were introduced as distinguishing features of social marketing, while recognising that other principles such as planning, review and evaluation are critical, but universally important to all interventions, and therefore not requiring specification (French and Blair Stevens, 2006; NSMC, 2009). These eight criteria (behaviour; customer orientation; theory; insight; exchange; competition; segmentation; and methods (marketing) mix) reinforced the value of Andreasen's original six benchmarks.

Next, a shift in practice occurred as the overly heavy reliance on methods of individual behaviour change became outdated and upstream environmental influencers were recognised as important audiences. While the emphasis was still on behaviour change, the focus of social marketing broadened beyond understanding behaviour at the individual level, to include upstream efforts which place emphasis on disrupting the existing environment, and creating one that better supports behaviour change. Thereby, social marketers started to consider how the discipline may not only improve the well-being of individuals but achieve

broader societal change through upstream interventions that consider environmental influencers and structures.

Taking a Wider View: Systems Solutions Era (2010 – 2021). While core ideas about social marketing such as segmentation, formative research, marketing mix and audience orientation have remained largely unchanged, critical developments over the past decade have come through the integration of knowledge from related fields. Lefebvre (2012) cites several disciplines that share social marketing's core value of customer centrality such as service dominant (SD) logic, service design and transformative service research (TSR), each with key concepts and knowledge that could be adapted to benefit the discipline. For example, SD logic and its concepts of value co-creation (Domegan et al., 2013; Zainuddin et al., 2013) and ecosystems (Brennan, 2016) provide valuable new directions for social marketing. The importance of value in social marketing first emerged in Kotler and Lee's (2008) definition which stated that social marketing is a process used to, "*deliver value in order to influence target audience's behavior*" (p. 219). Through value co-creation, users become joint collaborators in adopting or quitting behaviours, as opposed to targeted for exchange (Lefebvre, 2012). This novel way of thinking brought with it an increased focus on investigating bottom-up approaches to program design (e.g.: co-design), which vary from traditional expert driven or top-down approaches (Dietrich et al., 2016). Co-design has gained prominence in recent years as an approach that empowers participants to directly contribute to program design (Trischler et al., 2019).

More frameworks were developed and published during this era (Robinson-Maynard, Meaton et al., 2013; Lynes, Whitney et al., 2014; French and Russell-Bennett, 2015), all of which aim to further extract and define the essential characteristics of social marketing.

Robinson-Maynard (2013) developed a comprehensive list of 19 benchmarks. Many of these are equivalent to those in Andreasen's framework (e.g.: formative research could be considered equivalent to audience research), while others could be grouped under some of Andreasen's (2002) criteria (e.g.: multimedia initiatives, incentives and disincentives may form part of a marketing mix). French and Russell-Bennett (2015) identified the inequality between individual criteria as a weakness in the Robinson-Maynard et al. (2013) framework, along with the practical difficulty of using such a large number of criteria to define social marketing. Lynes's (2014) criteria were developed for the application of social marketing to sustainability issues, and consists of five broad steps with 20 action-based criteria. However, the authors themselves acknowledge that some criteria may be more essential for success than others (Lynes, Whitney, et al., 2014) which may explain the limited application of this framework to date.

Social marketing moved far beyond its origins and extended its scope by openly integrating and listening to other disciplinary approaches to achieving voluntary behaviour change (Donovan and Henley, 2010; French et al., 2011; Lefebvre, 2013; Hastings and Domegan, 2014). This wider focus is reflected in the most recent definition, developed through international consensus and endorsed by the social marketing associations, "*Social marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviours that benefit individuals and communities for the greater social good. Social marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform the delivery of competition sensitive and segmented social change programs that are effective, efficient, equitable and sustainable.*" (iSMA, 2013, p.1).

This new focus triggered an era of systems thinking, adopting a big picture approach to consider a whole structure before studying the means that establish this structure and before considering potential solutions. French and Gordon (2015) postulate that, “*systems thinking and social marketing are synergistic*” (p. 187) and a wider view that reflects an understanding of the environment within which people operate is needed to create social marketing solutions that work and assure delivery of outcomes over time (McHugh et al., 2018). The integration of systems thinking into social marketing has gained prominence (e.g.: Brychkov and Domegan, 2017; Kennedy, 2016) calling for “coordinated, multilevel, systemic change” (Flaherty et al., 2020, p. 147) that requires breaking down silos and transformation of our communities, organisations, and societies to deliver co-created change solutions (Domegan et al., 2016). Designing solutions for complex issues can be challenging, and at times overwhelming for decision makers. However, systems thinking as a foundation to social marketing practice appears inevitable to provide social marketers with a strategic approach that permits better resource allocation and understanding how more change can be achieved and on-going funding support can be secured.

Definitions over the past decade highlight the importance of ethical and sustainable approaches, with an emphasis on improving wellbeing over behaviour change (Lefebvre, 2012). Thus, to bring about long-term sustainable change, strategic partnership across the multiple layers is essential (e.g.: media, health clinics, funding organisations) (Brennan, 2016).

Strand 2 – An Umbrella Review of Social Marketing

Background

Systematic reviews of social marketing have become a common occurrence to improve our understanding of the effectiveness, scope and application of social marketing. Typically, these systematic reviews have tended to focus on assessment of specific contexts (e.g.: Stead et al., 2007; Kubacki et al., 2015a) or target audiences (e.g.: Kubacki et al. 2015b), and channels (e.g.: Kubacki et al. 2015c). However, limited attempts have been made to integrate the findings from systematic literature reviews assessing social marketing application and effectiveness. This study fills the void by conducting an umbrella review of existing systematic reviews in social marketing with the aim of examining the extent of the discipline's scope and the application and effectiveness of social marketing principles.

Method

Umbrella reviews, also termed 'overviews of reviews' or 'reviews of reviews' are studies of existing systematic reviews designed to provide an overall examination of evidence available for a specific topic (Whittemore et al., 2014). Umbrella reviews systematically examine, amalgamate and evaluate existing reviews, allowing the findings of separate reviews to be compared and contrasted (Hartling et al. 2012).

Search Strategy

To identify appropriate literature, we searched databases that were included by other social marketing reviews (see for example: Kubacki et al., 2015a, 2015b, 2015c; Pang et al., 2017). These included EBSCO Host (all databases), Emerald, Ovid (all databases), ProQuest (all databases), ScienceDirect and Web of Science. Article titles were searched using the

terms social marketing AND systematic literature review OR meta-analysis. Additionally, we conducted a keyword search for relevant reviews in all online issues of the *Social Marketing Quarterly* and the *Journal of Social Marketing*, which are the two main journals that are devoted specifically to the publication of social marketing research and practice. Reviews were only included if they used Andreasen's (2002) six principles or the revised set of eight principles used by the National Social marketing Centre (NSMC, 2009) as a set of criteria to judge whether a study was defined as having adopted a social marketing approach.

Differentiating between consumer orientation and insight criteria has, however, proved challenging, with researchers noting that classification is problematic as the two criteria are not mutually exclusive (Kubacki, Rundle-Thiele, et al., 2015b). Therefore, we have also considered reviews that featured only seven criteria (omitting insight). This process produced a total of ten reviews featuring 218 social marketing programs. Of these, 42 social marketing programs were duplicates and were removed resulting in a total of 174 individual social marketing programs.

Different search strategies were used in the original reviews included within this umbrella review. For full details of those searches please refer to the original reviews (Alhosseini Almodarresi et al., 2020; Almestahiri et al., 2017; Almosa et al., 2017; Carins et al., 2014; Garcia et al., 2011; Fujihira et al., 2015; Kubacki et al., 2015a, 2015b, 2015c). This umbrella review utilised a narrative approach as meta-analysis was not possible due to the heterogeneity of the included studies, including variation in study populations, outcomes measures and data analysis approaches and the absence of reported effect sizes for programs. To allow for meaningful extraction and analysis of data, each of the included studies were categorised based on their area of focus (social, health, environmental and economic). The studies were analysed to determine whether the authors presented evidence of applying each

of Andreasen's (Andreasen, 2002) benchmark principles (i.e.: behaviour change, audience research, segmentation, exchange, marketing mix, and competition), as well as theory use (NSMC, 2009).

Results and Discussion

The 174 social marketing interventions focused on a diverse range of contexts and behaviours spanning across health, environmental and social issues. Social marketing interventions seeking to address health issues were the most prominent (87%). Most notably, alcohol, tobacco, physical activity, and nutrition-based behaviours were targeted most frequently. Seventeen social marketing interventions (10%) were focused on addressing environmental issues – specifically littering. Only five programs (3%) addressed social issues, including domestic violence (Short et al. 2006; Harris et al. 2009), bullying (Bryn, 2011), road safety (Majdzadeh et al. 2011) and workplace injuries (Shams and Shamsi, 2013). Geographically, the majority of social marketing programs were implemented in the United States (58%, n=101), followed by the United Kingdom (10%, n=18), Australia (9%, n=15), Canada (3%, n=5), Iran (3%, n=5), New Zealand (3%, n=5), Netherlands (2%, n=3), and France, Germany and India had just two interventions each (1%).

---Insert Figure 1 about here---

Of the 174 unique social marketing interventions (see Table 2), a behaviour change aim was the most frequently applied principle, reported in 92% (n=160) of studies, followed by customer orientation (72%, n=125) and the marketing mix (60%, n=104). Juxtaposed, segmentation (30%, n=53), competition (36%, n=62), and exchange (38%, n=66) were the principles applied least. Only eleven social marketing interventions reported using at least six

of the social marketing principles. Of the eleven interventions that reported at least six or more benchmark criteria, all (100%) reported some positive behaviour change outcomes. A total of 90 (52%) interventions reported implementing only three or less principles with 59 of these interventions (65%) still reporting some positive behaviour change outcomes. The marketing mix, where at least two or more of the 4P's were implemented (i.e.: delivered more than communication) was implemented in 60% of the interventions. The most frequent use of the marketing mix involved the application of three P's (33%, n=36).

---Insert Table 2 about here---

The incidence of positive behaviour change was analysed to identify any relationship with the number of criteria assessed as used in the study. This analysis focused on six criteria (theory was not included in this analysis as not all of the systematic reviews used in the umbrella review assessed for theory). A group comparison found studies that reported positive behaviour change (n=124) were assessed as having used significantly more criteria (mean of 3.4 criteria used) than studies (n=50) that saw no change, or negative change (mean of 2.9 criteria used; $t=2.582$, $P=0.011$). This indicates that positive change is more likely to be observed when more criteria are applied in the development and delivery of social marketing programs. Indeed, studies that applied all six criteria all observed positive change. Our analysis then attempted to identify associations between use of individual criteria in an intervention, and change observed following that intervention. However, only one criteria was positively correlated with observed change (Behavioural change aim, $r(172) = 0.422$, $p < 0.001$), being present in every study that reported positive change, and in some that did not. This suggests that having a behavioural aim is critical, but also that there is a synergistic

effect that arises when multiple criteria are used and raises the question of whether the inclusion of some might be more important than others.

To determine which criteria were more commonly present in studies that reported positive behaviour change, and therefore more important, cumulative incidence (of change) and relative risk (RR) of change for different combinations of criteria were calculated. Cumulative incidence of change is the percentage of interventions using that combination of criteria that observed positive change. Relative risk compares how often change occurred in interventions with the same combination of criteria, relative to interventions with other combinations. Relative risk is an indicator of likelihood, and in this analysis was calculated relative to interventions that only used one criterion (which could be any one of the criteria). A positive value for relative risk indicates an increased likelihood, for example, a RR of 2.0 would mean a group of interventions saw twice the incidence of change relative to the reference group (in this case, the group of interventions that used only one criterion). Some combinations of criteria were not present in sufficient numbers to be used in the analysis. Table 3 shows the cumulative incidence for each number of criteria used, with the combination of criteria that increased the RR the most shown under a heading for each number of criteria (e.g.: behaviour, customer orientation and methods mix increased RR the most within intervention groups that used three criteria). This analysis shows there is almost twice the likelihood of observing positive change when six criteria are used instead of only one (RR=1.9). Behaviour, customer orientation, methods (marketing) mix and competition frequently appeared in the combinations with the highest relative risk (of change), meaning these criteria were most often associated with change following interventions.

---Insert Table 3 about here---

Strand 3 – Social Marketing Practice Review

Background

Social marketing has gained prominence in the NGO, government and charity sectors for developing solutions to some of the world's most pressing health (Kubacki et al., 2017), environmental (David et al., 2019) and economic issues and challenges (Lee and Kotler, 2009). In order to integrate and critically evaluate existing evidence, systematic reviews of social marketing often analyse studies in light of their application of the eight social marketing principles (see for example, Kubacki et al., 2017; Alhosseini Almodarresi et al., 2020; Čož and Kamin, 2020). Resulting research indicates that change is more likely to occur when more of the social marketing principles are applied (Carins and Rundle-Thiele, 2014, Xia et al., 2016) which has also been shown in strand 2 of this article. However, while systematic reviews focus on the application of social marketing benchmark principles in research, social marketing practice has been largely overlooked. Given the importance of wider application of benchmark principles, Strand 3 aims to assess the extent of the application of social marketing principles from a practitioner standpoint. By critically evaluating and synthesising evidence from practising social marketers, we aim to integrate and advance understanding of gaps between research and practice.

Method

Practitioner databases provide an opportunity to access social marketing case studies that are not published in peer reviewed literature. This strand provides an overview of how social marketing is used across social, health, environmental and economic issues in practice, to improve understanding of social marketing's application. Similar to the reviews of the academic literature conducted in the umbrella review above, the case studies were

examined to determine effectiveness, scope and application of social marketing across two key databases as outlined hereafter.

Search Strategy

The objective was to locate case studies suitable for assessment against the eight social marketing principles. To identify case studies, two of the most influential and reputable practitioner databases were consulted and examined. Case studies were obtained from the Tools of Change and the National Social Marketing Centres databases featuring a total of 238 practitioner case studies. Due to the volume of cases, our practitioner review was limited to sources within these two databases. While this was not an exhaustive search, the aim was to provide an evaluation of the state of social marketing's application in government, NGO and the charity sectors. In line with strand 2, and to allow for meaningful extraction and analysis of data, each of the included studies was categorised based on its area of focus (social, health, and environment). In addition, the case studies available on the databases were analysed for their application of the social marketing benchmark principles (i.e.: behaviour change, audience research, segmentation, exchange, marketing mix, and competition), as well as theory use and insights.

Customer/stakeholder orientation was considered present when a robust understanding of the audience and/or stakeholders was developed based on primary research and secondary research. *Segmentation* was deemed to have been applied when the case study reported evidence of dividing a total market into groups with similar needs (not just a broader target audience). Evidence of *Theory* required a relevant behaviour-change theory to be mentioned in the case study. It did not indicate if the program itself was theory-based. Note that if a program was founded on a theory-based school of thought (e.g.: community-based social

marketing) but the case study did not mention a particular theory, the theory was not considered to be evident in that case study. *Competition* criteria was met when any barrier/benefit related research, external competition assessment (other organisations/individuals that promote undesired behaviours) and/or an internal competition assessment (undesired behaviours that the audience prefers) was applied. The assessment of *Marketing mix* application categorised case studies into two groups — those that were focused on communication/promotion approaches (1P) only, versus case studies that featured a program, service, product, or movement which was considered as having applied the full marketing mix. *Exchange* was considered present when exchange was specifically mentioned or when there was a clear articulation of a product/service that provided the transaction of receiving and giving.

Results and Discussion

Of the 238 unique social marketing interventions (see Table 4), the majority were implemented in the United States (32%, n=77), Canada (30%, n=72), England (22%, n=52), Australia (2%, n=5), New Zealand (2%, n=4), and France and Norway with two case studies each (1%). This geographic focus reflects the publishers' locations (Canada and England) and language, although Tools of Change is also published in French. Behaviours targeted by the interventions spanned across environmental, health and social issues. The majority of social marketing interventions, (63%, n=151) targeted environmental behaviours. A focus on addressing climate change through increased adoption of sustainable transport options and sustainable living practices (e.g.: energy, water and waste) were observed. Health behaviours were targeted in 73 (31%) of the programs. Healthy eating, physical activity, and tobacco were targeted most frequently. Only 14 programs (6%) addressed social issues, with a focus on road safety and violence such as reducing crime, domestic violence, sexual violence and

bullying. Note that the topic distribution for the Tools of Change case studies has been influenced by the publisher's personal interests and the development of an annual call for nominations for new case studies related to building energy, transportation and climate change.

---Insert Figure 2 about here---

Behaviour change was the most frequently applied principle, reported in all instances, followed by application of the marketing mix (i.e.: more than a communication/promotion focus) (95%, n=227). Notably, customer orientation (87%, n=208), exchange (87%, n=207) and competition (82%, n=194) were also frequently applied. Alternatively, segmentation (49%, n=117) and theory (19%, n=45) were the principles applied least. It is important to note here that the definition of theory used in this analysis was aligned to the previous strand (the academic review) and only considered theory to have been used when behavioural theory was mentioned in the case study. It is quite possible that case study authors focused on the practical aspects of the intervention when providing details for the practitioner databases, and in doing so, have not provided detail of the use of any behavioural theory. Therefore, the frequency of theory use among interventions in these databases may be underestimated. Of the 238 included case studies, only eight reported using all seven social marketing principles. Most interventions reported application of four (36%, n=63) and five (33%, n=57) principles. Of the 15 interventions that reported application of two or less principles, 93% (n=14) observed positive behaviour change. In the 15 cases where limited application of the benchmark principles was observed (i.e.: two or less), the marketing mix (87%, n=13) and exchange (80%, n=12) were applied most.

---Insert Table 4 about here---

Tenets shaping the next decades of social marketing

Drawing on 50 years of research in social marketing, this paper synthesised scholarly and practitioner evidence involving more than 28 social marketing definitions drawn from 293 papers, 174 unique interventions reported in ten evidence reviews and 238 case studies. The amalgamation of definitions shows a transition, firstly away from commercial marketing and profit maximisation into the social space marking the birth of social marketing, then to the adoption of a strong and persistent focus on behaviour change. This was followed by a drive to articulate a unified process for social marketing to ensure efficacy is optimised, and finally to embracing a stance that recognises complexity and system influences. The umbrella review confirmed that social marketing is more effective when more principles are applied. The umbrella review makes a further contribution by finding incremental improvements in success rates when certain principles are applied, indicating that some criteria may be more important than others. In doing so, it identified having a behavioural change aim, adopting a consumer orientation, including a mix of programs and strategies, and having an awareness of the competitive influences as important.

Transpiring from this, five tenets emerge from these three strands of research

- (1) Evidencing Marketing Principles
- (2) Operationalisation of Processes, Principles and Activities
- (3) Implementing Systems Thinking
- (4) Creating and Testing Marketing Theory, and
- (5) Guiding a New Social Marketing Era.

All of the tenets are discussed in detail hereafter with the aim of summarising key gaps and future research priorities for social marketing researchers and practitioners.

(1) Evidencing Marketing Principles

This paper demonstrates across strands 2 and 3 that marketing is effective in changing behaviour to produce social benefits and thus expands our understanding of marketing's important contribution towards behaviour change in the social, health and environmental domain. Social marketers have systematically looked back and assessed how interventions and programs have applied the principles of marketing (e.g.: Kubacki et al., 2015a, 2015b, 2015c; Schmidtke et al., 2021; Stead et al., 2007) and demonstrated the concomitant growth in effectiveness with the application of more principles (Carins and Rundle-Thiele, 2014; Firestone et al., 2017; Xia et al., 2016). Our umbrella review extends this finding beyond nutrition (Carins and Rundle-Thiele, 2014), physical activity (Xia et al., 2016) and health (Firestone et al., 2017) by examining a broader range of domains such as environmental issues and social issues in addition to health, and as such continues to build, broaden, and strengthen the evidence base. However, despite consistent findings that the use of more principles equates to more change, little is understood about what role each of the principles plays when it comes to contributing to program effectiveness. Strand 2 suggests that incorporating certain principles may increase the incidence of positive change, demonstrating an increased likelihood of change when particular combinations of criteria are included in program implementation, when compared to other combinations. This indicates that some criteria may be more important than others, signalling that having a behavioural change aim, adopting a consumer orientation, including a mix of programs strategies and having an awareness of the competitive influences as important. However, it is currently unknown whether this would hold beyond the studies included here, and further research is warranted to explore and confirm whether some principles are more important than others.

Further effort is needed to clearly define each of the principles, and more importantly to describe what they entail and how to use them. This is critical for social marketing to

further demonstrate its efficacy and efficiency, and to maintain and gain further relevance by assisting practitioners and managers to translate academic knowledge into impactful actions. Furthermore, we need to integrate other core marketing concepts into the social marketing principles to ensure that branding, marketing funnels, and other central marketing ideas (e.g.: AIDA, ATR) are integrated and used in the social marketing context. Lastly, research that integrates fundamental marketing concepts across the system of stakeholders (back to a philosophy of business operation — and beyond — to societal operation) is needed to understand which strategies contribute to better outcomes (Hunt, 2018).

Given we know that application of marketing principles leads to better results, we still see too little application of the principles overall. For example, Strand 2 demonstrates that across the academic published work, principles such as exchange (38%), competition (35%), segmentation (31%), and theory (20%) remain severely underutilised. This finding was partially reflected in practice, with segmentation (49%) and theory (19%) the most underutilised concepts (noting that theory may be even more under-reported in practitioner databases than academic articles). Similarly, to our umbrella review in Strand 2, Firestone and colleagues (2017) and Schmidtke et al. (2021) identified theory, competition, segmentation and exchange as the four least applied principles across more than 100 interventions in low- and middle-income settings countries – further confirming our findings of the limited application of the social marketing principle and/or documentation. Until today, work on behaviour change often lacked value propositions that are exchange worthy (see for example Kubacki et al., 2015) but it becomes increasingly evident that without it some instantaneous exchange uptake is extremely unlikely (Firestone et al., 2017).

In summary, we need more operationalisation of marketing principles and then empirically test the applications to demonstrate how and why they work. This will help social marketers increase efficiency and effectiveness.

(2) Operationalisation of Processes, Principles and Activities

Successful marketing results from the systematic application of marketing principles. This systemic and holistic view of ‘*marketing as a philosophy of business operation*’ (Lazer and Kelley, p. 14) has endured, as have important fundamentals of marketing strategy (segmentation, competition, consumer/market orientation, value exchange) despite minor definitional changes or ‘re-branding’ (Hunt, 2018). Rather than continuously introducing new models and frameworks, more marketers must go back and test whether the fundamentals of marketing are effective (Lahtinen et al., 2020). Research effort needs to be rebalanced — away from investigations of small singular phenomena in greater and greater depth towards a systemic view of how marketing can be applied to assist managers, practitioners, governments, and other entities make progress with the complex issues they face in today’s society (Rundle-Thiele et al., 2021; Webster and Lusch, 2013). The real-world is messy and non-linear which provides marketers with challenges that are less suitable for complex methodologies, long surveys, and abstract recommendations.

Marketing scholars can do more to help academics and practitioners understand what it means to use marketing for the betterment of people, society and the planet (Chandy et al., 2021). The evolution of highly specialised roles in marketing (c.f. customer experience manager, social media manager, e-commerce manager, SEO/SEM manager) also encourages a deeper focus on thin slices of the marketing function rather than how the entire marketing function can benefit the organisation. There is nothing wrong with a more specialised inquiry – in fact we encourage it – as long as there remains practical relevance rather than academic

naval gazing. Excellence in one thin slice may be equivalent to a drop in the ocean if not well coordinated or integrated with the other marketing functions. If those working in marketing practice are not provided with 'how to do' stepwise instructions along with clear descriptions, the application of any academic learning from the forefront of knowledge generation will be lost in translation. Bridging the theory-practice gap is important to demonstrate the relevance of marketing in a hyperconnected world. Whilst this specialised investigation is a phenomenon also observed across other disciplines, social marketing is arguably too small (at the time of writing) to have the same level of specialisations that we observe in the mainstream marketing literature. However, it is likely to gain increasing prominence as the field grows and matures further.

Strand 1 discussed the development of processes, principles and frameworks that aim to advance the social marketing discipline. Most fall short when it comes to providing clear descriptions for specific hierarchies and/or sequential application of social marketing principles and techniques. These are required for a more consistent application of social marketing along with clearly outlining how systematic change can be enacted. That way we can better document successes and failures and work towards metanalytical reviews that demonstrate the effectiveness of social marketing. Further operationalisation can help and many positive examples already exist in the social marketing space such as how to undertake specific marketing activities including co-creation via the seven step co-design process (Trischler et al., 2019), and the Co-create–Build–Engage (CBE) process (Rundle-Thiele et al., 2021). The CBE process provides social marketers with a process, principles, and a set of activities to ensure programs are developed based on marketing fundamentals and principles. Furthermore, these principles are linked together in a three-step continual process meaning it can be used to design, implement and evaluate social marketing programs, and offers a way

to operationalise marketing to deliver lasting win-win-win solutions (Roemer et al., 2020; Rundle-Thiele et al., 2021). CBE ensures that the eight NSMC social marketing criteria are considered and applied to the extent that budgetary constraints allow, and provides a stepwise process explaining how each can be applied. CBE is one process that helps to overcome the theory-practice divide and ensures people and planet centric work demonstrating the capacity for marketing to be applied to positively contribute and reverse some of the world's most pressing health, environmental and social issues (Rundle-Thiele et al., 2021). However, even CBE still falls short in using social marketing principles and social marketing scholars have not yet attempted to engage a wider systems lens into existing benchmarks, process models, frameworks and techniques. We see this as a gap needing to be addressed, given that the importance of systems thinking to social marketing problems has become evident. These grand challenges require careful systematic work and system thinking and its role in marketing is discussed next.

(3) Implementing Systems Thinking

Strand 1 demonstrated that the integration of systems thinking into social marketing has steadily increased as social marketers move to address many complex and dynamic issues in today's world while attempting to access and allocate funding more effectively (Brychkov and Domegan, 2017; Flaherty et al., 2020; Truong et al., 2019). It allows marketers to better understand interactions among varying parts of a system with an emphasis on how to connect micro choices with macro structures (Brychkov et al., 2022). This focus on environmental shapers extends beyond the individual to allow for structural changes (Carins et al., 2020). Domegan et al., (2016) propose that a systems thinking approach enhances the social marketing field through concepts of scale (i.e.: understanding what level in the ecosystem to focus the behaviour change program) and causation (i.e.: recognising relationships between

social mechanisms and infrastructure) which when combined allows for an orchestrated co-created change process to occur. Indeed, systems thinking encourages social marketers to embrace a philosophical position that moves ‘beyond the individual’ to recognise the complexity and diversity in this broader space; to adopt a meta-theoretical orientation together with methodological pluralism to develop understanding of issues; and to develop multi-level and multi-faceted strategies to create change where financially most beneficial (Truong et al., 2019). However, budget constraints do not always allow for the targeting of multiple layers of the ecosystem. Whether equipped with larger or smaller budgets, or dealing with the commercial or social application of marketing, integrating systems thinking within marketing provides a strategic approach, identifying multiple leverage points which can be prioritised, or targeted serially over time. By prioritising and investing in systems thinking, organisations can set themselves up for sustainable success, achieve more change and on-going funding support.

Systems thinking enhances many of the core principles of social marketing, adding richness and depth to consumer and stakeholder orientation and greatly expanding the understanding of competitive influences, identifying additional opportunities for value exchange, and encouraging the development of a broader mix of solutions (interventions, programs, campaigns, products and services) within the wider system as well as more tailored solutions. While social marketing benefits from a systems thinking perspective to help develop more targeted interventions across upstream and downstream stakeholders, little guidance on how systems thinking can be integrated into existing social marketing principles and processes exists to date. More guidance is required here regarding how systems thinking can be further operationalised.

(4) Creating and Testing Marketing Theories

Theory is deemed critical in social marketing (French and Blair-Stevens, 2006) and in other behavioural and social science disciplines (Rundle-Thiele, et al., 2019). Application of theory is recommended in the design, implementation and evaluation of behaviour change programs (Prestwich et al., 2015; Willmott et al., 2019). However, the evidence base shows conflicting patterns with some theory-based programs demonstrating larger effects than programs without theory input (e.g.: Gourlan et al., 2016; Bluethmann et al., 2017; Willmott et al., 2019) while others demonstrate mixed effectiveness following theory use (Dalgetty et al., 2019; Prestwich et al., 2015) or superiority of some theories above others (e.g: Albarracín et al., 2005).

Our academic (strand 2) and practitioner reviews (strand 3) send mixed signals, too, and we were not able to assess the effects of theory on program effectiveness in isolation. A large body of work on the quest to assessing the value of theory is underway (see for example David and Rundle-Thiele, 2019; Rundle-Thiele et al. 2019; Willmott and Rundle-Thiele, 2021). Nonetheless, this study demonstrates the need for clearer and more consistent reporting. If theory is not mentioned and reporting does not explain how theory influenced the design of a program then it is rather likely that it never occurred in the first place, or was not an integral part of the design and execution of the program. Across both strands, theory was the least reported principle with only 19% of programs reporting theory use in the practitioner strand and 21% in the academic strand. This may indicate a lack of theoretical grounding among practitioners and academics. Based on other scientific fields, as outlined above, there is merit and hope that social marketing programs would become even more effective if theory was applied to the program design more rigorously. However, it is important to note that suboptimal reporting of theory within articles (and by extension —

case studies) has previously been observed (Dalgetty et al., 2019), meaning a theory may not be mentioned even when it has influenced program design, or a theory is mentioned when it has only minimal integration in the program design. Categorising interventions based on explicit reporting of theory alone with no other information makes it challenging to establish links between theory and program effectiveness (Michie and Prestwich, 2010). Furthermore, the definition of ‘theory’ and the role it plays in behaviour change is widely debated (Willmott and Rundle-Thiele, 2021). Many consider theory to provide an organised method of thinking about observed phenomena; and when applied, can explain how and why things occur the way they do (Willmott and Rundle-Thiele, 2021). For some, frameworks and behavioural techniques may provide a systematic way of understanding a problem and how change may be initiated — without using the term ‘theory’, even though theoretical knowledge and development may have played a hand in the creation of those frameworks (Whetten, 1989). Clear reporting of theory, frameworks or techniques that underpin interventions would provide the detail needed to determine the role of theory in the program’s effectiveness.

Our paper demonstrates low levels of theory use across both strands, and the need for additional theoretical application, testing and documentation of findings is required. There is strong evidence emerging outside of marketing (e.g.: health) that demonstrates a single theory (rather than a combination) (e.g.: Gourlan et al., 2014) and detailed mapping onto the program leads to greater effectiveness. Specifically, this means that more effectiveness is observed when the intervention targets a determinant that predicts behaviour, is capable of changing that determinant, and is delivered to the target population, culture, and context (Kok et al., 2016). Social marketers must therefore clearly document how theory informed the building of solutions (e.g.: programs, products, services, etc.) and in turn assess whether this

helped to build more effective solutions. Applying and testing core marketing theories and assessing if and how well they work should be a key priority for marketers moving forward (for more thoughts on this see Rundle-Thiele et al., 2019). Finally, academics could better communicate theoretical frameworks and methods of application in ways that practitioners can easily apply and embed them into their solution building.

(5) Guiding a New Social Marketing Era

The COVID-19 global pandemic prompted lightning-fast transformations to the global economy that have resulted in immediate large-scale changes and impacts on organisations (De Smet et al., 2020), consumer behaviour (Diebner et al., 2020), marketing and communication strategies (Think with Google, 2021), and public policy (Ansell et al., 2020). These dramatic changes are not restricted to the economic landscape but have exacerbated existing social issues such as domestic violence (Boserup et al., 2020), mental health (Czeisler et al., 2020), and plastic pollution (Benson et al., 2021). Issues relating to climate change mitigation and adaptation are becoming more urgent. Marketing research needs to become more aligned with issues that are faced by organisations, society, and the environment and seek a closer collaboration with practitioners to ensure we are investigating what matters. The need for effective approaches to alleviate the complex issues that are entrenched or emerging in society is increasing (Chandy et al., 2021) and social marketing should have a more prominent seat at the table to help fix these issues. Particularly strands 2 and 3 of this paper have demonstrated the scarce application of social marketing to social issues such as violence (e.g.: domestic violence, sexual violence, bullying), road safety and crime reduction. Across both strands, only 19 interventions (5%) addressed social issues, pointing to an important issue that social marketing has the potential to contribute more to via a wide range of innovative solutions informed by systems thinking.

Social marketing originated from thought leaders in the marketing discipline and their idea that marketing should be used to address societal challenges. Thus, social marketing is deeply grounded in marketing theory and practice (Kotler and Zaltman, 1971). Philip Kotler's motivation to create social marketing stemmed from an era where marketing was dominated by profit maximisation and selling products and services to people that didn't even know they needed them. Early marketing was being used as a mechanism to sell products that are now responsible for harm to both people and the planet. For example, marketing sold the benefits of plastic by highlighting how it keeps food fresher for longer, placing emphasis on using plastics to increase hygiene. Early marketing also sold the benefits of smoking, leveraging medical professionals as influencers for tobacco. Historically commercial marketing activity was, and in many cases still remains, heavily fixated on profit maximisation. However, many current and emerging marketing academics are asking for change as they show a sincere desire to apply marketing as a force of good (Chandy et al., 2021; Gonzales-Arcos et al., 2021; Robitaille et al., 2021; Weihrauch and Huang, 2021). Social marketing was conceived as an approach that places social and environmental issues at the core, and social marketers generally retain a tight focus on increasing social wellbeing and environmental protection. However, the emergence (or strengthening) of additional goals within both commercial and social marketing is illuminating areas of overlap — and hence areas where each can learn from the other. Social marketing is increasingly required to demonstrate that programs are financially sustainable, and the integration of system thinking motivates the search for solutions that provide mutual benefits (e.g.: business outcomes for one stakeholder group and social benefits for another group). Commercial entities are often required to demonstrate positive contributions to (or the zero effect on) social or environmental goals and are increasingly responding to consumer demand for purpose driven, rather than profit driven

business activity. We have global evidence that social marketing influences health behaviours and health outcomes in low- and middle-income countries (see Firestone et al., 2017 and Schmidtke et al., 2021) as well as high-income countries (many examples are provided in this review).

Kassirer et al. (2019) discuss the changing relationship between more educated and better-connected citizens and their governments and businesses; articulating social marketing's opportunity to offer, "*a proven, evidence-based methodology for developing, delivering, and evaluating social policies and programs that rebuild trust and satisfaction by aligning with citizen needs and values and by including cocreation opportunities*" (p. 221). Social marketing associations can take a role of facilitating training and capacity-building programs and encourage tracking of program impacts on citizen trust and satisfaction. Our review also points to gaps in non-English speaking country contexts where there is a lack of social marketing documentation and potential application. However, examples of application in Asian country contexts are emerging on topics such as managing overpopulation, preventing communicable diseases and climate change (Pang et al., 2021). We encourage a unified and consistent reporting of these interventions and case studies via, for example, social marketing associations around the world. A global database of social marketing case studies is needed along with consistent reporting standards to ensure social marketers can document their value proposition to funding bodies and organisations more clearly. Increasingly, marketers of all subdisciplines will be asked to step up and help protect people and the planet and this is where social marketing can lead the way. Specifically, the implementation of more social marketing principles along with greater adoption of a systems thinking approach can assist in better operationalising our work and make it more effective in the long-term. Implementation of more principles ensures people's interests are held at the

centre during the entire process, and common ground is identified between the goals of the marketer and the goals of individuals, enabling co-creation of solutions that people value (Rundle-Thiele et al., 2021). Systems thinking embraces complexity, connects micro choices with macro structures, recognises relationships between social mechanisms and infrastructure and allows for an orchestrated co-created change process to occur to ensure solutions deliver the highest return on investment. It's a key differentiator of social marketing in its approach to solving social, health and environmental problems when contrasted to the motivations of a purely commercially driven marketer. Of course, social marketing itself is not without its ethical issues (see for example Brenkert, 2002; Laczniak and Michie, 1979 for a richer discussion), and there are future challenges that will need to be overcome – particularly that systems thinking inevitably challenges us with where limited resources (e.g.: on projects bringing immediate relief or longer-term solutions) should be used (Szablewska and Kubacki, 2019). Issues around conceptualising what “social good” means and who is able to decide this across different contextual challenges remains disputed (Szablewska and Kubacki, 2019) and, presently, the discipline has not yet set consensus guidelines on the ethical principles of social marketing despite this having been considered for years. Social marketing has been challenged with other issues such as the confusion of the term with social media (Lee and Kotler, 2019) and distinction from other behaviour change approaches such as communication, behavioural economics, education, as well as a lack of formal courses (see Abkar et al., 2021 for a richer discussion).

The Marketing Science Institute released their 2020-2022 research priorities to evolve the marketing field and ensure its relevance. One of these priorities is identifying and articulating marketing's role and responsibilities in creating sustainable and society-relevant strategies. Further, Deloitte compiled insights from consumers and business executives to

formulate their Global Marketing Trends for 2021 (2021 Global Marketing Trends). One of the trends was purpose — that of a bigger ‘why’ than for profit, and a bigger ‘who’ than shareholders. The report notes that consumers are moving towards entities that support socially important endeavours (2021 Global Marketing Trends). This is not to suggest these trends represent a version of social marketing. But perhaps this does indicate that 50 years after the genesis of social marketing (as a leap sideways to address social issues), commercial marketing has a renewed focus on social marketing by seeking positive contributions to societal, health and environmental issues. In this way, social marketing has much to contribute to the broader field and to the world. The approach to planned social change that marked the beginning of social marketing looks set to continue to develop and strengthen in the next 50 years — and may well have a bearing on the course of marketing as a contributor to society and future generations.

Limitations and Future Research Agenda

Our study was not able to undertake a meta-analysis to estimate the effect size of any change resulting from the implementation of social marketing programs, and, from the application of any aspect of social marketing (such as application of individual criteria). It is also important to note that a positivity bias may be associated with cases of self-reported case studies in strand 3 and could arguably also be present across strand 2, given there would be less desire to report on unsuccessful social marketing interventions as this may be perceived as jeopardising future funding success. In order to make stronger conclusions around the effectiveness of social marketing, our work demonstrates the need to more clearly define each of the social marketing principles and describe how to apply them. Whilst we showed that some combinations of principle application were more likely to be associated with positive change, balanced experimental designs that vary the number and combination of criteria

would be required to provide definitive evidence of the increased efficacy of particular combinations.

Future meta reviews are warranted along with an in-depth investigation into the differing principles and their individual contribution to achieving desired outcome change. If social marketing is seeking to gain more relevance in the behavioural change sector, then this is a must. Future research should consult additional case studies from social marketing textbooks and other practitioner databases to further assess its application and effectiveness. Wider examination of social marketing research and practice beyond developed nations would enable greater generalisation of our findings. Given that the application of more marketing principles leads to better results, wider application of social marketing is needed to contribute to a better world.

Clear description of principles and stepwise instructions are needed so that practitioners can implement social marketing to its fullest extent within the budgetary envelope provided. Whilst many social marketing academics, and specialists are tightly partnered with organisations and communities enacting change, more can be done to ensure academic learning from the forefront of knowledge generation is communicated, so that others can use it in practice. Importantly, communication should explain how new findings or processes should be embedded in the complete marketing process.

We also uncovered the need for further integration of systems thinking into existing benchmarks, process models, frameworks and techniques to help develop more targeted solutions to the satisfaction of end users and stakeholders. Systems thinking embraces complexity, connects micro choices with macro structures, recognises relationships between social mechanisms and infrastructure and allows for an orchestrated co-created change process to occur to ensure solutions deliver the highest return on investment. Additionally, our work demonstrated low levels of theory use across social marketing programs and we

recommend that social marketers clearly document how theory informed the building of solutions as well as assessing how theory helped to build more effective solutions.

Moving forward, marketing research needs to become more aligned with issues that are faced by organisations, society, and the environment and seek a closer collaboration with practitioners to ensure that we investigate what matters. The contribution that social marketing has made to positive change during its first 50 years is evident, and demonstrates how the application of marketing principles can enact positive change. More applied social marketing research and translation over the next decades can consolidate and extend these successes, ensuring marketing contributes to positive change for people and the planet.

Conclusion

This paper reviewed 50 years of social marketing work across three strands. The field of social marketing has grown and has significantly evolved from its initial approach in adapting commercial marketing to address social issues, to become a multi-disciplinary field seeking the most effective approach to achieving desired outcome change and positive social impact. Our review assesses 412 social marketing solutions and demonstrates the field's ability to help overcome the most pressing health, environmental and social challenges. The three strands integrate academic and practitioner evidence to demonstrate social marketing's contribution, providing organisations and government with confidence that money invested in social marketing delivers a return on investment. This paper proposed research priorities that can be applied to refine, recalibrate and future-proof social marketing's success in making the world a better place.

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Table 1: Evolution of Social Marketing

	Marketing for social good era (1969 – 1989)	Voluntary, individual behaviour change era (1990 - 1999)	Planning into action: Process orientation era (2000 – 2009)	Taking a wider view: Systems solution era (2010 – 2021)
Theories	Exchange theory	Motivation, opportunity, ability theory, Theory of reasoned action	Relationship marketing; behaviour change theories	Value co-creation; behavioural ecological model; stakeholder theory
Trends and disruptions	Communication; education; segmentation; formative research; the marketing mix	Voluntary behaviour change; program evaluation; social marketing benchmark principles	Upstream social marketing; social marketing benchmark principles; community-based social marketing; systematic planning process	Systems thinking; value co-creation; co-design; digital technologies (internet marketing, online communities, mobile technology, gamification); sustainability
Insights	Using marketing theory and practices to market social movements	Focus on voluntary behaviour change as the end goal; benchmark principles established to distinguish social marketing from other disciplines	Social marketing as a systematic planning process; from individual methods of behaviour change to upstream environmental influencers as targets	Improving well-being over behaviour change; multi-faceted interventions targeting multiple layers of the eco-system
Illustrative articles	Kotler and Zaltman, 1971; Kotler, 1975; Kotler and Roberto 1989	Andreasen, 1994; Albrecht, 1997; Rothschild, 1999	Andreasen, 2002; French and Blair-Stevens, 2005; Andreasen, 2005, NSMC 2009	Kennedy and Parsons, 2012; Lefebvre, 2012; Brennan et al., 2016; Domegan et al., 2016; iSMA et al., 2017; Rundle-Thiele et al., 2021

Table 2: Total Application of Benchmark Principles

Systematic review	Total	Customer/ Stakeholder orientation	Segmentation	Theory	Competition	Marketing mix	Exchange	Behaviour change	Behaviour change outcomes*
Kubacki et al. (2015a)	21	21 (100%)	2 (10%)	N.a	4 (19%)	10 (48%)	6 (29%)	13 (62%)	✓(+) (n=7; 33%); ✓(+/=) (n=3; 14%); ✓(+/-) (n=1; 5%); ✓(=) (n=2; 9.5%); - (n=6; 28.5%); - (-/=); (n=1; 5%); - (+) (n=1; 5%)
Kubacki et al. (2015b)	15	11 (73%)	1 (7%)	N.a	7 (47%)	13 (87%)	2 (13%)	14 (93%)	✓(+) (n=11; 73%); ✓(=) (n=3; 20%); - (n=1; 7%)
Kubacki et al. (2015c)	18	14 (78%)	8 (44%)	N.a	11 (61%)	15 (83%)	5 (28%)	15 (83%)	✓(+) (n=9; 50%); ✓(=) (n=3; 17%); ✓(*) (n=3; 17%); -(n=3; 17%)
Kubacki et al. (2017)	21	18 (86%)	2 (10%)	N.a	4 (19%)	15 (71%)	11 (52%)	21 (100%)	✓(+) (n=13; 62%); ✓(+/=) (n=3; 14%); ✓(+/*) (n=1; 5%); ✓(*) (n=4; 19%)
Alhosseini A. et al. (2020)	5	5 (100%)	2 (40%)	3 (60%)	2 (40%)	4 (80%)	2 (40%)	4 (80%)	✓(+) (n=4; 80%); - (n=1; 20%)
Almestahiri et al. (2017)	14	12 (86%)	1 (7%)	8 (57%)	4 (29%)	13 (93%)	7 (50%)	14 (100%)	✓(+) (n=13; 93%); ✓(*) (n=1; 7%)
Carins et al. (2014)	27	22 (81%)	26 (96%)	N.a	9 (33%)	20 (74%)	9 (33%)	27 (100%)	✓(+) (n=18; 62%); ✓(=) (n=3; 10%); ✓(*) (n=6; 21%)
Fujihiri et al. (2015)	5	5 (100%)	2 (40%)	N.a	3 (60%)	5 (100%)	3 (60%)	5 (100%)	✓(+) (n=3; 60%); ✓(*) (n=2; 40%)
Almosa et al. (2017)	16	4 (25%)	0 (0%)	10 (63%)	14 (88%)	8 (50%)	1 (6%)	16 (100%)	✓(+) (n=14; 87.5%); ✓(=) (n=2; 12.5%)
Garcia et al. (2011)	32	13 (41%)	9 (3%)	15 (47%)	4 (13%)	1 (3%)	20 (6%)	31 (97%)	✓(+) (n=17; 53%); ✓(+/=) (n=7; 22%); ✓(=) (n=5; 16%); ✓(*) (n=2; 6%); - (n=1; 3%)
Total	174	125 (72%)	53 (30%)	36 (54%)	62 (36%)	104 (60%)	66 (38%)	160 (92%)	✓(+) (n=111; 63%); ✓(+/=) (n=13; 7%); ✓(+/-) (n=1; 0.5%); ✓(=) (n=18; 10%); ✓(+/*) (n=1; 0.5%); ✓(*) (n=18; 10%); - (n=12; 7%)

* ✓+ Positive behavioural outcomes reported | = no behavioural change | - negative behavioural outcomes reported | * behavioural outcomes not reported, but positive proxy changes observed

Table 3 – Cumulative Incidence of Change, and Relative Risk of Change, for Each Combination of Criteria Used

Combination of criteria used in interventions	Positive Change Observed	No/Neg Change Observed	Total	Cumulative Incidence of Change (%)	Relative Risk (RR)
<i>One Criteria (any criteria)</i>	8	7	15	53%	1.0
Behaviour	8	3	11	73%	1.4
<i>Two Criteria (any criteria)</i>	22	12	34	65%	1.2
Behaviour + any other	22	8	30	73%	1.4
<i>Three Criteria (any criteria)</i>	38	16	54	70%	1.3
Behaviour + Customer orientation + Methods mix	18	5	23	78%	1.5
Behaviour + Methods mix + any other	26	4	30	87%	1.6
<i>Four Criteria (any criteria)</i>	30	10	40	75%	1.4
Behaviour + Customer orientation + any 2 others	28	9	37	76%	1.4
Behaviour + Customer orientation + Methods mix + any other	21	8	29	72%	1.3
<i>Five Criteria (any criteria)</i>	16	5	21	76%	1.4
Behaviour + Customer orientation + Methods mix + Competition + any other	12	2	14	86%	1.6
<i>Six Criteria</i>	10	0	10	100%	1.9

NB: Analysis examined use of six NSMC criteria: Behaviour; Customer orientation; Exchange; Competition; Segmentation; and Methods (Marketing) mix. Theory and Insight were not included as they were not assessed in all systematic reviews.

Cumulative incidence = percentage of interventions using that combination of criteria that observed positive change

Relative Risk = increased likelihood of interventions observing change (relative to the reference group of interventions – in this case those which used one criterion - any criterion)

Table 4: Tools of Change and National Social Marketing Centre Case Studies Combined

Review	Total	Customer/ stakeholder orientation	Segmentation	Theory	Competition	Marketing mix	Exchange	Behaviour change*
Tools of Change	174	144 (83%)	77 (44%)	12 (7%)	131 (75%)	171 (98%) 1 (1P) (0.6%)	170 (98%)	171 ✓(+) 2 (=) 1 ✓(*)
NSMC	64	64 (100%)	40 (62.5%)	33 (52%)	63 (98%)	56 (88%) 7 (1P) (11%)	37 (58%)	56 ✓(+) (88%) 5 ✓(=) (8%) 3 ✓(*) (0.5%)
Total	238	208 (87%)	117 (49%)	45 (19%)	194 (82%)	227 (95%) 8 (1P) (3%)	207 (87%)	227 ✓(+) (95%)

* ✓(+) Positive behavioural outcomes reported | = no behavioural change | ✓* behavioural outcomes not reported, but positive proxy changes observed | ✓(=) No behavioural change, but positive proxy changes observed

FIGURE 1

Strand 2 - Social Marketing Application by Geography

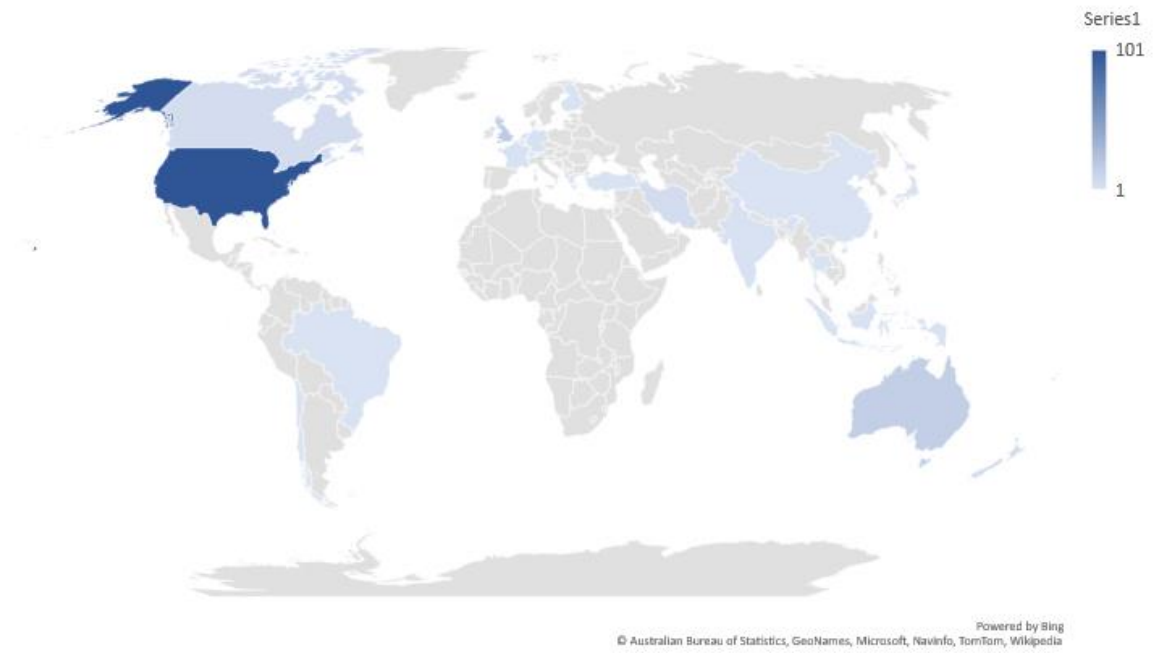


FIGURE 2

Strand 3 - Social Marketing Application by Geography

