



## Two-Stage Taxonomy for Measuring Success in Social Marketing Practice

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## Two-Stage Taxonomy for Measuring Success in Social Marketing Practice

### Abstract

**Purpose** – Given the lack of understanding of social marketing success in theory and practice, this article investigates how social marketing experts conceptualize success.

**Method** – In this qualitative study, we conducted an open-ended online questionnaire with 48 worldwide social marketing experts, most with more than 20 years of experience in the field. We 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. We provide a two-stage taxonomy to better understand success in social marketing.

**Originality** – This article is one of the first to conceptualize success in social marketing practice.

**Keywords** – Success, Two-Stage Taxonomy, Social Marketing, Behavior Change, Behavioral Outcomes, Evaluation

**Type of article** – Research paper

### Introduction

The achievement of intended behavioral objectives, effectively engaging the target audience, and, in some cases, behavior maintenance have been considered the normative criteria by which social marketing interventions have been judged to be successful (Liao, 2020a; Liao, 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.

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3 Theoretically, the underlying notion of measuring success in social marketing practice is  
4 context-dependent and discussed in different ways but still largely unknown. One framework  
5 for categorizing how success in social marketing interventions has been operationalized is  
6 Andreasen's (2002) benchmark criteria. These criteria are considered predictors of social  
7 marketing success (Kubacki & Szablewska, 2019) and were presented to successfully plan,  
8 design, and implement interventions. Andreasen's (2002) criteria are deeply rooted in  
9 commercial marketing and include behavior change objectives, consumer research,  
10 segmentation, targeting, marketing mix, exchange, and competition. The criteria have been  
11 mostly utilized as a tool to analyze whether the interventions are designed as social marketing  
12 (Carins & Rundle-Thiele, 2014; Xia *et al.*, 2016; Aceves-Martins *et al.*, 2016; Kim *et al.*, 2020;  
13 Coz & Kamin, 2020; Ryan *et al.*, 2021). Some argued that Andreasen's (2002) criteria do not  
14 reflect the current state of play of social marketing; hence, they should be applied with caveats  
15 (Akbar *et al.*, 2019; Suggs & Speranza, 2022). Others offered several new success factors,  
16 including marketing selection elements, meeting the needs of beneficiaries, designing effective  
17 communication tools, developing a feedback system, focusing on cost and benefit analysis,  
18 consumer orientation, strategic planning, information resources, and research (Cohen &  
19 Andrade, 2018; Dietrich, 2016; Khajeh *et al.*, 2015; Kotler & Armstrong, 2016; Lee & Kotler,  
20 2016; Liao, 2020a; Lin, 2014; Wood, 2016). Nevertheless, these factors operate differently in  
21 different circumstances, have a causal relation structure, and remain notional.

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37 Social marketing practice also recognizes factors that contribute toward successful results.  
38 These factors include setting up explicit behavior change objectives, employing the most fitting  
39 communication channels that meet the target audience's needs, focusing on robust research on  
40 the target audience, and pre-testing the intervention. Other factors comprise paying attention  
41 to the monitoring and evaluation channels, developing a partnership approach when dealing  
42 with complex issues, and using theoretical underpinning to design interventions (Akbar *et al.*,  
43 2021a).

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50 Even though the literature presents a range of success factors informed by theory and practice,  
51 they are not necessarily sufficient considering the multidisciplinary approach and applications  
52 of social marketing (Gordon *et al.*, 2016; Gordon & Gurrieri, 2014; McHugh & Domegan,  
53 2017). Some overlap is noted upon comparing success criteria put forward by academics and  
54 practitioners. These criteria mostly differ regarding applications and circumstances in which  
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3 they have been employed. Social marketing would benefit from more unified success criteria  
4 for better future practice. This study adds further impetus to the extant literature by exploring  
5 and analyzing the experts' perspectives.  
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10 Theorization of success is a common practice in many disciplines, such as law, justice, and  
11 global development (Saeed, 2008), organizational behavior (Heslin, 2005), public health, and  
12 health communication (Dwerryhouse *et al.*, 2020; King & Crisp, 2021), entrepreneurship  
13 (Razmus & Laguna, 2018), and business and management (Gorgievski *et al.*, 2011). Success  
14 is not yet formally conceptualized in social marketing practice, identifying a significant  
15 research gap. This study aims to fill this gap by exploring the views of social marketing experts  
16 to evaluate and conceptualize success.  
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23 The paper first analyzes the literature on current definitions and measures of success in social  
24 marketing practice, then the qualitative study results. Finally, a two-stage taxonomy of success  
25 based on the findings is presented to improve future practice.  
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## 29 **Literature review**

### 30 ***Interpretation of success***

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35 The interpretation of success in social marketing practice takes different avenues in the  
36 literature. The most simplistic interpretation sees success as the opposite of failure, highlighting  
37 that failure is caused by the absence of formative research and poor management at the  
38 implementation stages (Akbar *et al.*, 2023; Akbar *et al.*, 2021b; Cook *et al.*, 2020; Cook *et al.*,  
39 2021). However, the dichotomy of success versus failure to evaluate interventions has been  
40 criticized because it does not allow unpacking the elements that affect behavior change  
41 (Willmott & Rundle-Thiele, 2022). Others do not precisely define success but associate the  
42 term with compliance with certain conditions that predict success. Several terminologies are  
43 interchangeably used to present these conditions in the literature, including frameworks (Cohen  
44 & Andrade, 2018; NSMC, 2010), factors (Akbar *et al.*, 2021a), foundations (Kim *et al.*, 2021),  
45 criteria (Andreasen, 2002; Lynes *et al.*, 2014; Liao, 2020b) or principles (Lee, 2020; Carins,  
46 2022).  
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57 Emerging systematic reviews explicitly suggest the benchmark criteria (Andreasen, 2002) as a  
58 measure of success (Cairns & Rundle-Thiele, 2014; Kubacki *et al.*, 2015; Firestone *et al.*, 2016).  
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3 For example, applying behavior change, theory, and the marketing mix is associated with  
4 program effectiveness (Kim *et al.*, 2019). More specifically, behavior change will likely occur  
5 when more benchmarks are used (Aceves-Martins *et al.*, 2016; Xia *et al.*, 2016). Similarly,  
6 while presenting an evidence review, Dietrich *et al.* (2022) recommended more use of  
7 benchmark criteria for successful outcomes. Some experiment-based studies, such as Lahtinen  
8 *et al.*'s (2020) work on fruit and vegetable intake of 6–13-year-old Finnish children, suggested  
9 the full application of the marketing mix is more effective than a promotion-focused campaign  
10 in increasing the fruit and vegetable intake within children. Such arguments highlight the  
11 assortment of ways of understanding success. Still, the notion of success is loosely presented  
12 in these studies, and various jargon is used to define success, such as positive outcomes,  
13 successful results, and effectiveness. In essence, if a social marketing intervention complies  
14 with most of these conditions, it will be assumed to succeed.

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17 The premise of *how success looks like in social marketing practice* was further developed by  
18 Liao (2020b), Lynes *et al.* (2014), and Akbar *et al.* (2021a). These authors broadly defined  
19 success factors, including some of Andreasen's (2002) benchmark criteria and novel factors  
20 emerging from practice. For example, Liao (2020b) tested 14 factors along with the execution  
21 of a health social marketing intervention in Taiwan to demonstrate 1) which factors will lead  
22 to success and 2) which factors were more influential/causal. The results showed that  
23 constructing effective messages to target audiences was the most important success factor,  
24 followed by meeting the need for beneficiaries to enact voluntary behavior change. Importantly,  
25 the author warned that success was determined by having enough resources/continued funding  
26 to carry out the social marketing intervention (Liao, 2020b), signifying funders' role, power,  
27 and authority in measuring success (Akbar *et al.*, 2021b).

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30 For a successful outcome, the work of Wettstein & Suggs (2016) distinguishes conceptual  
31 factors from procedural factors. Conceptual factors refer to the core concepts or foundational  
32 ideas that help characterize an intervention as social marketing, for example, the social  
33 marketing benchmark criteria (Andreasen, 2002). In contrast, procedural factors influence the  
34 internal and organizational development of social marketing interventions. In this group, the  
35 literature identifies several examples, such as message strategy (Finnel & John, 2018; Liao,  
36 2020b), information sources (Liao, 2020b), operation process, and planning (Liao, 2020b;  
37 Akbar *et al.*, 2021a), monitoring and evaluation (Liao, 2020a; Dietrich *et al.*, 2019; Khalenberg  
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3 *et al.*, 2021; Akbar *et al.*, 2021a; de la Sierra-de la Vega *et al.*, 2022), social networks and  
4 partnerships (de Lange *et al.*, 2021; Schmidt *et al.*, 2022) and organizational resources (Liao,  
5 2020b). From the aspect of planning and designing interventions, the synergy among  
6 procedural factors enhances the likelihood of a successful outcome. Even though these factors  
7 differ in number, type, or significance, they have two points in common: 1) emphasis on  
8 effecting individual voluntary behavior change and 2) lack of attention to structural conditions  
9 influencing behaviors (e.g., poverty). However, each factor's contribution to successful  
10 outcomes remains unknown from the management stance.

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18 Success in downstream social marketing is associated with achieving behavioral outcomes  
19 defined at the early stages of the intervention after conducting formative research (Lavack *et*  
20 *al.*, 2007; John *et al.*, 2019). The broader definition of success (adapted from public health)  
21 highlights three dimensions: 1) program success, i.e., meeting intended objectives and  
22 producing desired behavioral outcomes. 2) Process success, i.e., preserving the legitimacy of  
23 the process, ensuring successful implementation, and 3) policy success, i.e., enhancing the  
24 policy agenda, sustaining the broad values and future direction (McConnell, 2010). Behavioral  
25 outcomes in social marketing practice are understood twofold: 1) eliminating or weakening an  
26 undesirable behavior, e.g., smoking, and 2) maintaining or strengthening the desired behavior,  
27 e.g., exercising (Dibb & Carrigan, 2013). Evidence shows that success is being measured in  
28 terms of behavioral outcomes and behavioral factors, including attitudes, knowledge, or  
29 perceived self-efficacy, which are intermediate outcomes (Andreasen, 2002), and health  
30 outcomes, such as rates of morbidity, mortality, and fertility (Stead *et al.*, 2007; Kubacki *et al.*,  
31 2015; Firestone *et al.*, 2016). Still, the mechanism of measuring success at the process and  
32 policy level (McConnell, 2010) is largely unidentified.

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

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14 Dibb & Carrigan (2013) distinguish the short- and the long-term measurement of success. In  
15 the short term, the measure of success is determined by the number of achieved behavioral  
16 outcomes. In contrast, long-term success depends on how many behaviors are maintained over  
17 time. Importantly, evaluations at the midterm of interventions can provide insights that  
18 ultimately enhance the achievement of behavioral outcomes (Dietrich *et al.*, 2019; de la Sierra-  
19 de la Vega *et al.*, 2022). Such behavioral outcomes can also be measured discretely during the  
20 intervention, particularly at the end, using summative evaluation techniques (Evans, 2022).  
21 However, the argument is whether such monitoring and evaluation strategies should be  
22 described as measuring success.  
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31 Acknowledging the overlap between monitoring, evaluating, and measuring success is  
32 imperative. Overall, monitoring and evaluation rely on effectiveness (Stead *et al.*, 2006),  
33 focusing on behavioral outcomes and understanding what happened during the implementation.  
34 *"Social marketing monitoring and evaluation aim to determine the effectiveness of campaigns*  
35 *in achieving their communication and behavioral outcome objectives. They seek to answer two*  
36 *questions: Did the campaign achieve its objectives? If so, how did it achieve them?"* (Evans,  
37 2016). Traditionally, monitoring and evaluation are ongoing processes (Truong *et al.*, 2021;  
38 Dietrich *et al.*, 2019; Hodgkins *et al.*, 2019), aiming to provide insights that ultimately make  
39 amendments and adjust the intervention based on the changing needs of the target audience  
40 (Dietrich *et al.*, 2019; de la Sierra-de la Vega *et al.*, 2022). For example, when impact  
41 evaluation is conducted, it aims to measure the leap from behavior change to health and social  
42 outcomes (e.g., improvement in health or quality of life). **However, such techniques broadly**  
43 **do not go beyond process, outcome, and impact evaluation (Weinreich, 2010).**  
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55 McHugh & Domegan (2017) encourage social marketers to adopt a reflective stance in  
56 evaluating success, capturing the complex relationship, knowledge, and networking between  
57 actors operating at different levels of interventions. While monitoring and evaluation provide  
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3 insights into effectiveness that can be interpreted as success, some authors advocate evaluating  
4 how and why success happened rather than focusing on what worked well (Gordon & Gurrieri,  
5 2014; McHugh & Domegan, 2017). These authors highlight the need to include multiple  
6 measurement groups in the evaluation process, such as participants/beneficiaries, researchers,  
7 and stakeholders (NGOs and governmental bodies). This indicates that measuring success  
8 relies on the perspective of multiple actors and what they value in the social marketing  
9 intervention, other than achieving desired behavioral outcomes.

### 16 ***Success at the midstream, upstream, and systemic level***

19 **As the debate on monitoring, evaluation, and measuring success continues, some studies**  
20 remarked that social marketing interventions were effective across various actors and settings.  
21 At the midstream level, the effectiveness was associated with 1), for example, coalitions with  
22 schools, universities, churches, and workplaces, 2) the active involvement of family and  
23 community members in activities and events, and 3) organizational changes, such as the  
24 redesign of school curriculum to increase physical activity classes (Stead *et al.*, 2007; Wood *et*  
25 *al.*, 2016). Other studies showed that effectiveness could also be conceptualized by the  
26 upskilled proportion of people in the community (Rundle-Thiele, 2022) and the engagement  
27 with multipliers. These people have the skills to replicate the intervention's messages (Bastos  
28 *et al.*, 2022).

31 Overall, the term *effectiveness* at these levels refers to influencing policymakers 1) to gain their  
32 support for the development of the intervention, 2) to enact policies to promote the desired  
33 behavior, for example, and 3) to create healthier environments; for example, construct walking  
34 paths and station exercises in low-income suburbs (Stead *et al.*, 2007; Skerletoupoulos *et al.*,  
35 2020).

37 **On the other hand,** success is mostly obtained by having a holistic view of social problems and  
38 targeting multilevel societal actors (e.g., individuals, organizations, companies, governmental  
39 bodies, etc.) via tailored strategies and messages through a systemic approach (Domegan *et al.*,  
40 2016). The systemic approach creates synergies between the different actors, whose  
41 decisions/actions ultimately will result in sustainable behavior change. An example of a  
42 systemic approach is the *Life of Health* campaign, which targeted policymakers, organizations,  
43 and individuals to increase healthy eating and exercise. This campaign had positive results at  
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3 the individual level, the involvement of universities, and the upstream level (enacting local  
4 regulations to allow open spaces for exercising, thereby enabling continued uptake of the  
5 desired behavior) (Bastos *et al.*, 2022). The key aspect of succeeding with the systemic  
6 approach is the involvement of actors in co-creating the intervention from the early stages; this  
7 process helps accelerate the behavior change of individuals (Burksiene *et al.*, 2019;  
8 Skerletoupoulos *et al.*, 2020; Kim *et al.*, 2021; van Hierden *et al.*, 2022).  
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15 **Other examples of successful macro/upstream/systemic level interventions include Canadian**  
16 **anti-smoking intervention (Kennedy and Parsons, 2012; Flaherty *et al.*, 2020), and Vietnamese**  
17 **interventions in helmet use for biker riders, reducing smoking throughout Vietnam, reducing**  
18 **drink driving, and increase the rate of consumers of fortified food (Truong, 2017; Flaherty *et***  
19 ***al.*, 2020). These interventions influence the institutional norms of the system in terms of policy**  
20 **changes in the form of restrictions, enacting laws and regulations such as taxes and import**  
21 **duties on tobacco and alcohol, fines on drink and driving, etc. However, no evidence of**  
22 **consideration of structural or system change as success was noted.**  
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30 Such examples expand on the capability of social marketing to develop multi-layered  
31 interventions targeting audiences at down, mid, and upstream levels. An approach to designing  
32 multiple-level interventions is strongly evident in the broadening social marketing literature  
33 (Domegan *et al.*, 2016). Even though it is considered useful in systems thinking in social  
34 marketing, *"there are so many interconnected levels of society involved that what to change*  
35 *and in what order becomes overwhelming"* (Kennedy, 2015, p.4). This multiple-level approach  
36 evidently offers greater social impact and reach and ultimately enforces behavior change;  
37 conversely, it diversifies the meaning of success. Expanding this, despite the nature of social  
38 marketing, i.e., social good, the connotation of success varies at down, mid and upstream levels.  
39 This resonates strongly with the notion of innovative thinking about behavior change at the  
40 downstream (individuals), midstream (community groups), and upstream (policymakers)  
41 levels (Kennedy & Parsons, 2014). However, when measuring success, greater attention must  
42 be given to individuals' voices and power relations between the down, mid, and upstream levels.  
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### 52 53 ***Socio-cultural and critical perspectives of success*** 54

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56 Understanding how culture shapes human action is key to developing successful social  
57 marketing interventions, given that it provides better insights into the complexity of behavior  
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3 change (Spotswood & Tapp, 2010; Sutinen, 2021). Authors embracing socio-cultural theory  
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5 posited a different interpretation of success in social marketing. For example, Spotswood &  
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7 Tapp (2010) showed that in working-class communities in the UK, individuals were resistant  
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9 to exercise because working-class culture does not support exercise, and the social norms of  
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11 this social group are strong. These authors acknowledged that shifting cultural patterns is  
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13 difficult and takes longer and recommended involving other disciplines for a successful  
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15 outcome, such as public policy and public health, pushing for behavior change.

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

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51 Finally, some authors identify that social marketing lacks non-Western voices and thinking in  
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53 its critical discourse (Gordon *et al.*, 2016; Cateriano-Arévalo *et al.*, 2022). This is because most  
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55 literature on documenting social marketing successes is published in the Western context  
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57 (Cateriano-Arévalo *et al.*, 2022). There is a possibility that the success criteria used in the  
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59 Western context may not work in the non-Western world. Examining a universal approach to  
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61 measuring success would advance conversations, theory, research, and practice to foster social  
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63 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 & Reibold, 2015; Patten & Patten, 2018) was employed 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 & Calisir, 2014) and Twitter (Sibona & 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. 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 & 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

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3 score, the better the model. For this study, the participants' responses have been put through  
4 the topic modeling process to generate themes of interest. A total of seven topic clusters were  
5 generated. After generating topic clusters, themes were developed based on keywords in each  
6 topic. The next section explores these themes and is followed by a discussion.  
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## 10 11 **Findings and Discussion**

### 12 13 14 **A - The Practice of Measuring Success**

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17 This section focuses on the actuals of practice adopted in measuring social marketing success.  
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#### 19 20 *Variance in measuring success*

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23 *"...it depends on who is doing the measuring...."*  
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25 The success of social marketing interventions rests firstly on the objectives set for each  
26 initiative and their associated measures. It is found that there is a high variance in how  
27 practitioners set objectives. There is a difference in their approaches to setting measures,  
28 depending on their roles and the time duration spent in such roles within a given organization.  
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33 *"...program initiators might measure success in terms of a lack of resistance to the*  
34 *program, positive media coverage gained, or that they like the creative executions...."*  
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38 The above quote indicates that communication teams or campaign designers may focus purely  
39 on short-term aspects of the interventions when measuring success. Success is often measured  
40 only in inputs, activities, and outputs. For example,  
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44 *"when outcomes are reported, they are too often short term only (one year or less)."*  
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47 Participants also mentioned that success is usually measured by,  
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50 *"the uptake of a new behavior' or by 'the abandonment of undesirable behavior"*  
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53 It is typically measured for the short term with no mention of long-term success measurement.  
54 This is an interesting insight as the conceptualization of success in the long term is based on  
55 how many behaviors are maintained over time (Dibb & Carrigan, 2013). However, in this case,  
56 the measurement of success in the long term among practitioners is seldom undertaken. One  
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3 reason could be that few are in the roles for long enough for long-term behavior change to be  
4 part of their measure of success. Additionally, the sample of this study involved experts from  
5 six different sub-continent playing various roles in different organizations, each with a  
6 different purpose, setting objectives of interventions. Hence, measuring success is *contextual*  
7 to the case of every individual and the purpose of their organization.  
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### 13 ***Role of funding***

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16 Participants also believe that *budgetary provisions* are a good indicator of success, with  
17 previously successful campaigns receiving a significantly higher budgetary allocation. If the  
18 funding team measures success, they mostly focus on the commercial aspects of the  
19 interventions. This is one area wherein prior literature (Liao, 2020a) has argued that the  
20 availability of financial resources largely determines the campaign's success. The participants  
21 also argued that adopting a committed financial strategy early in the social marketing campaign  
22 can lead to adopting several criteria to measure success.  
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29 *"When budget allows, success is measured with process measures, outcome measures,*  
30 *and behavioral measures. When it does not allow, often only outcome measures."*  
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33  
34 Another reason practitioners conceptualize success in the long term but may not measure it in  
35 the long term may be the paucity of financial provisions as the campaign prolongs. Measuring  
36 success requires practitioners to focus on the process, the outcome, and behavioral measures.  
37 However, participants argued that such an approach could lead to escalated costs, which  
38 prevent them from adopting this method and forces them to focus mainly on process outcomes  
39 that can be used to justify their actions to funding bodies by highlighting numbers or statistics  
40 that signify *action* but not necessarily *outcome* in terms of behavior change.  
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47 *"Many try to quantify it but do not have sufficient funding to conduct a valid*  
48 *evaluation, so measures focus more on process objectives (i.e., how many people*  
49 *were reached, how much attention the campaign received, etc.) than outcomes."*  
50  
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53  
54 Budget allocation and availability are key factors in determining how effectively success is  
55 measured, particularly in the long term. The financial strategy of campaigns hence determines,  
56 to a large extent, the gap between success conceptualization versus measurement among  
57 practitioners (a detailed discussion follows). The geographical diversity of the participants of  
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3 this study highlights that in emerging economies, the availability of funding is a constraint for  
4 practitioners. However, these budgetary restrictions should not stop social marketers from  
5 developing a dialogue with funders about the significance of measuring success and future  
6 impact. The result of a lack of sustainable funding is that social marketing has developed a  
7 short-term focus, explained in the following theme.  
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### 13 *Short-term focus*

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16 As discussed in the previous theme, practitioners sometimes focus on short-term convenience  
17 statistics. One indicator of short-term success is *engagement*. *Reach* and *recall* are used as  
18 indicative factors of the rate of engagement of a particular social marketing campaign.  
19  
20  
21

22 *"High reach and high recall of messages."*  
23  
24

25 The participants cited several objectives while explaining their experience of measuring  
26 success. For example, *exposure to the intervention, increased awareness, acceptance of desired*  
27 *behavior, or successfully reaching out*, in some cases, to the target audiences. The *reach* aspect  
28 involves the number of *lives touched* without delving into whether the consequent behavior  
29 changes were long-term (or adopted at all). In the case of many participants, it is not the desired  
30 behavior change but the penetration of their campaign that is used as a success determinant.  
31 This is evident from our findings wherein objective, measure, and campaign recall were higher  
32 frequency codes, strengthening this particular theme.  
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40 The medium via which the social marketing interventions are carried out is vital as it can  
41 determine the objectives and measures. For example, campaign/message recall can be one  
42 sufficiently measurable metric via recall uptick. Some participants believed that the extent and  
43 nature of media coverage determine the *engagement level* with a particular campaign, which  
44 can be useful. The level of resistance encountered by each program also determines the  
45 *acceptability* of a particular campaign and is used by some practitioners to measure success.  
46 The data demonstrate these measures are centered around the *level of engagement* each  
47 campaign generated and the *campaign's reach*. The medium allows practitioners to evaluate  
48 the awareness level reached, dialogues initiated, and perception/attitudinal change.  
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3 *"...these come in many forms (knowledge, attitude, behavior change). But it can also*  
4 *extend to how many people we have reached, visited our project website, engaged*  
5 *with our program, etc."*  
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9 Our evidence indicates that practitioners focus more on engagement and acceptability and less  
10 on behavior change. The findings suggest a lack of clarity in understanding the 'process' that  
11 leads to behavior change or a willingness to ignore the same due to financial constraints.  
12  
13

14  
15 Social media is argued to be an effective medium due to its technological enabling effect,  
16 allowing practitioners to use algorithmically generated insights to measure success.  
17 Participants have, however, argued that this approach could become problematic as it ignores  
18 the long-term behavior change at the core of social marketing.  
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23  
24 *"...they might look to short-term data [through social media] like campaign recall or*  
25 *favourability...."*  
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27

28 Though this may be relatable only for those who had either short-term, voluntary, or part-time  
29 social marketing roles, which did not allow them enough time to measure long-term success,  
30 again, similar to how a lack of financial strategy may hinder the measurement of long term  
31 social marketing success, the use of technology by practitioners is also geared towards the short  
32 term. The interesting part is that the short-term focus is not by design but due to the constraints  
33 of the reality of practice, as evident below,  
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39  
40 *"often short-term political/organizational thinking expects behavior change to*  
41 *happen quickly and does not invest sufficient time or resources to develop robust*  
42 *monitoring and adaptive response capability."*  
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46 The pressures of the real world of practice being fast result orientation and paucity of funding  
47 are the major factors that have led to practitioners adopting short-term success measures. The  
48 findings point towards practitioners sometimes giving more importance to convenient  
49 *perception building* via statistics aimed at pleasing the financial and political/organizational  
50 stakeholders rather than achieving behavior change outcomes that benefit society. This can also  
51 be linked with the overall objectives of the interventions; for example, one participant  
52 mentioned:  
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3 *"By the adoption of the intended behavior, it's context-dependent. It may be possible*  
4 *to count the number of people who phone a helpline or take up the opportunity to get*  
5 *a vaccine, for example. There may also be other ways of measuring success, e.g.,*  
6 *fewer road traffic accidents due to a road safety campaign. But all the intended*  
7 *measures of success should be built into the objectives for the program so that*  
8 *measurement is possible."*  
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15 A mindset that values long-term measurement of success is significant, but there is insufficient  
16 understanding of how to do this. The findings show a good understanding of possibilities but  
17 lack actual actions and efforts in measuring long-term success.  
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21 The discussion on using tools other than social/digital/earned media and metrics/statistical  
22 tools (such as Andreasen, 2002, benchmark criteria) for measuring the success of social  
23 marketing efforts is also evident. Although these tools allow long-term measurement, the  
24 effectiveness of a tool is only as good as the intention of its user. The findings suggest that the  
25 tools are geared towards short-termism in measuring success; however, the conceptual  
26 understanding of success among the participants paints an alternative picture, as discussed in  
27 the following theme.  
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### 33 34 **B - The Conceptual Understanding of Measuring Success**

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37 While section A focuses on the reality of practice adopted by participants in measuring success  
38 in current social marketing practice, section B emphasizes the conceptual understanding of  
39 measuring success for future practice.  
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41

#### 42 43 *Evolving practice of measuring success*

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46 In discussing the nature of their practice of success measurement, the participants were equally  
47 candid when discussing their concept of success. It was refreshing to observe that the  
48 participants are beginning to note the aberrations in their current practice of measuring success  
49 and moving towards a discussion on how the practice should evolve. In this regard, they refer  
50 to their conceptual understanding of success, which is discussed in this, and the following  
51 themes.  
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3 *"I would like to say that in the last decade, there has been a push to use social*  
4 *marketing benchmark criteria to succeed in interventions. So another form of*  
5 *measuring success is how many criteria we have used in our intervention."*  
6  
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9 Similarly, the effectiveness of using surveys, interviews, and focus groups with the target  
10 audience to measure the level of behavior change is strongly echoed, as stated below.  
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13  
14 *"Seeing people move through the stages of change over time as a result of our*  
15 *messaging."*  
16  
17

18 At the same time, the role of such approaches is also questioned. For example:  
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20

21 *"... I believe in the change, but when I see the difference between the cultures, I still*  
22 *think there is something deeply we have to change more than the numbers."*  
23  
24  
25

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

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47 *"Success is the achievement of proposed aims at an individual and socio-ecological*  
48 *level in social marketing intervention."*  
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52 It is observed that success in social marketing is measured in two ways. 1) At an individual  
53 level, success happens when targeted individuals adopt the proposed behavior or have the  
54 desire to adopt the proposed behavior. 2) At a socio-ecological level, success occurs when  
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3 social actors support social marketing intervention to create conditions to adopt the proposed  
4 behavior. In such cases, success is measured beyond reach, engagement, and awareness  
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7  
8 As discussed in the previous section, *increased awareness* and *engagement* are the initial focus  
9 areas of success measurement, which involves the practitioners focussing on broadening the  
10 awareness level of the campaign among the target audience. An example of this may be the  
11 campaign recall uptick. While awareness does not lead to behavior change, the latter is a  
12 success factor (albeit intangible) of the awareness campaign, yielding a result. For example,  
13 whether an anti-smoking advertisement has created sentiments of anti-smoking behavior  
14 among the target audience could be measured. The next downstream stage involves individuals  
15 acting to change their behavior. This is a tangible factor that may vary across individuals,  
16 ranging from a first attempt at adopting changed behavior, making a related purchase that aids  
17 that behavior change, or making inquiries with the campaign body for further details or support.  
18 An example of this action the practitioners give is the *dialogue with social marketing actors*, a  
19 stage wherein individuals initiate discussions around the behavior change among family or  
20 friends.  
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30  
31 *"Meeting the audience where they are and providing clear, actionable behavioral*  
32 *guidance that is easy and popular (social proof), leading to the desired behavioral*  
33 *outcome."*  
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38 At the midstream stage, which involves coalition with **wider stakeholders, for example, one's**  
39 **family or friends** (McHugh & Domegan, 2017), the individual has reached a mental state  
40 wherein individual-level understanding has been gained regarding the perceived benefits of the  
41 behavior change.  
42  
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45  
46 *"Intended action is occurring and is evident at a larger societal scale."*  
47

48  
49 *Social proof* signifies the involvement of social actors who endorse or support a particular  
50 campaign or the behavior change attempts of individuals. This indicates the diffusion of the  
51 social marketing concept at a socio-ecological level. The penultimate stage involves many  
52 individuals who have passed through the earlier stages, successfully overcome failed attempts  
53 to change behavior, and *sustained the changed behavior*. Similarly, a *policy change* at the  
54 upstream level (McHugh & Domegan, 2017) occurs when public bodies and governments enact  
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3 supporting mechanisms and policies at the macro level based on the evidence of sustained,  
4 successful behavior changes.  
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### 7 ***Behavior change as a measure of success***

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10 Interestingly, behavioral change, central to social marketing conceptualization (Gordon *et al.*,  
11 2016), is neglected when measuring social marketing success (as observed in section A of the  
12 findings). This theme discusses the rationale provided by the participants behind why it is  
13 neglected and the complexity of measuring behavior change. Although conceptually ideal, the  
14 difficulty of using behavior change as an objective cannot be associated with an ideal measure.  
15 The different intervention objectives can be objectively and statistically determined in the case  
16 of an offline or an online campaign. For example, the quote below highlights that several  
17 practitioners using a *statistical* approach may cause falsification or an illusion of success.  
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25  
26 *"...often just statistically significant changes that might not have a true impact on*  
27 *larger outcomes...."*  
28

29  
30 While the subjective nature of behavior change creates complexity for practitioners regarding  
31 its measurement, it is argued that it remains the ultimate objective of social marketing and  
32 should not be traded off with short-term success measures; however, our findings suggest  
33 otherwise. This is because *measuring success* is vaguely presented in social marketing theory  
34 and practice. In addition, the role of funders in influencing success criteria and political  
35 organizations' pressures is repeatedly noted in our findings. Funders often prefer measures of  
36 engagement and reach rather than measuring the actual behavior change (as discussed  
37 previously).  
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45 The results further demonstrate the misperception of success criteria among social marketers.  
46 Insights gained in the current study highlight the incongruence between how success is  
47 currently measured and how it should be measured in future practice. When reflecting on the  
48 current practices used to measure success, participants focused on the significance of the  
49 engagement level of the target audience. At the same time, gauging the changes in the behaviors  
50 is completely ignored. For example:  
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57 *"...rare to see behavior change measured."*  
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3 The same group of participants, on the other hand, suggests that success in future practice  
4 should focus on the *longer-term outcomes*, as evident in the quote below,  
5  
6

7  
8 *"Beyond looking at success metrics (usually limited to engagement rather than*  
9 *including outcomes). I would argue that process and outcomes evaluation are a huge*  
10 *part of success."*  
11  
12

13  
14 These outcomes are attributed by the participants to be *sustained behavior changes*, as evident  
15 below,  
16  
17

18  
19 *"The ability of strategies to result in long-term sustained desired behaviors."*  
20  
21

22 The findings suggest a paradox in the conceptual thinking and actual measurement of success.  
23 Further interpretation and probing of our findings suggest that participants look at social  
24 marketing success as a process with a circuit that allows them to refine their success  
25 measurement practice as new realities emerge. This is discussed further in the following theme.  
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28

### 29 ***Success is seen as an ongoing process***

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32 *"I would define success in social marketing as rapidly learning and adjusting based*  
33 *on what works (or does not) and learning what to do differently next time."*  
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37 Dietrich *et al.* (2019) and De la Sierra-de la Vega *et al.* (2022) argue that the monitoring and  
38 evaluation process of social marketing involves making amendments and adjusting  
39 interventions. The above quote signals a similar understanding among practitioners that success  
40 in social marketing may be a (longer-term) process. It was interesting to note that while most  
41 of the findings pointed towards the short-term focus on measuring success, the conceptual view  
42 is still that of a longer term. To interpret the findings, the often flawed practices undertaken in  
43 an environment of real-world constraints allow practitioners to point toward the need for  
44 longer-term measures. This is a departure from the findings reported in the earlier half of the  
45 discussion, which agrees with the view of Akbar & French (2022), who argue that practitioners  
46 have a limited view of social marketing beyond reach and engagement. Most participants view  
47 success as a continuous process since behavior change may have varied gestational periods due  
48 to its individually specific nature. Continuous learning, determining what works and what does  
49 not, and continually improving one's approach are the keys to success. It is interesting to note  
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3 that instead of viewing success as one unit, participants view it as various degrees of success.  
4  
5 For example,

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7  
8 *"Success can also be a matter of time and the gradual accretion of other factors."*  
9

10 The participants also view success as individual or socio-ecological, wherein individual  
11 success is determined.

12  
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14  
15 *"... when targeted individuals adopt [the] proposed behavior or have the desire to*  
16 *adopt [the] proposed behavior."*  
17  
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20 Socio-ecological success is seen as,

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23 *"... when social actors support [the] social marketing intervention to create*  
24 *conditions to adopt [the] proposed behavior."*  
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26

27 The data provides a dichotomy between social marketing success, seen as an absolute, versus  
28 social marketing success, seen as relative to wider social actors. The data also suggests that  
29 social marketing success is viewed in various degrees or levels, with complete behavior change  
30 being the ultimate goal:  
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35 *"To what extent did this facet of the program induce the change we wanted it to*  
36 *induce?"*  
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39  
40 While the objective is to reach the ultimate goal, our participants have indicated that the journey  
41 is to engage in continuous learning, incremental improvements, and maintaining resilience. As  
42 argued by the practitioners, the components of the findings and the gaps lead the authors to  
43 propose a two-stage taxonomy to measure and overcome the issue of the limited view of social  
44 marketing among practitioners beyond reach and engagement.  
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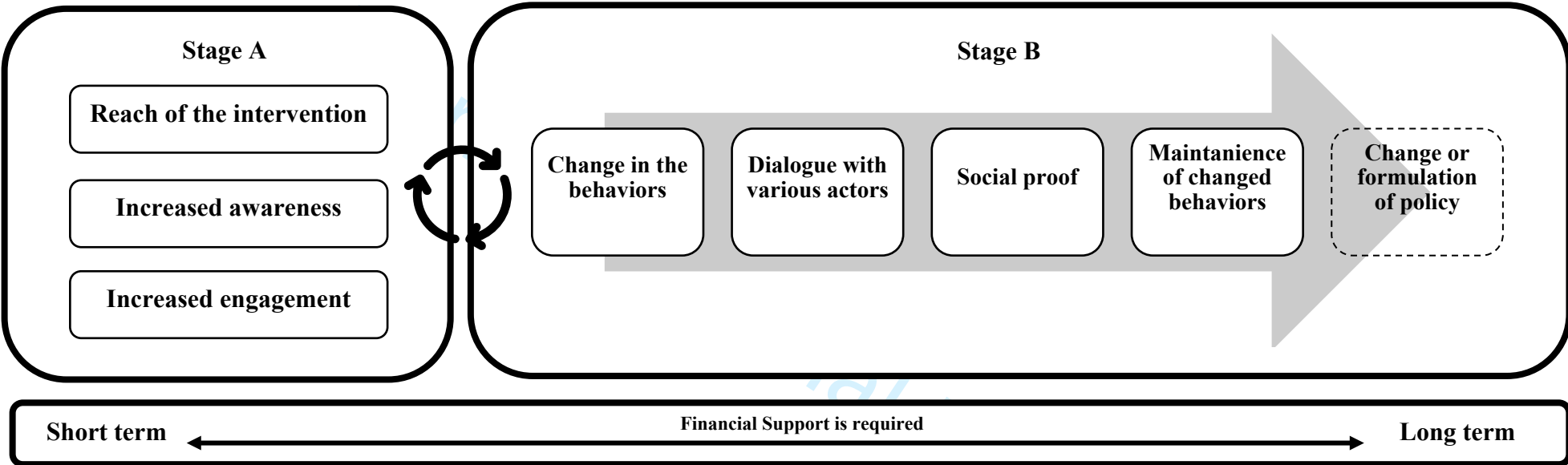
### 49 **Proposed Taxonomy**

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52 The contradiction between how practitioners conceptualize success and how they measure it is  
53 highly interesting. The short-term focus due to financial constraints and political/organizational  
54 pressures leads to a short-term result orientation, evident in our findings. Due to its measuring  
55 complexity and long-term gestation period, behavior change is not a preferred objective for  
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3 success. It is, however, viewed as extremely important by the same sample when  
4 conceptualizing success. This inconsistency is alarming and should be a topic of a more  
5 detailed study. This aspect also emerges as a key gap between social marketing theory and  
6 practice. In the literature, Andreasen's (2002) criteria are commonly cited as one of the most  
7 effective in leading to successful behavioral outcomes. However, as Suggs & Speranza (2022)  
8 argued, the criteria are mainly operative in helping categorize what social marketing is and is  
9 not. As per our study, either the plethora of existing frameworks and criteria (Akbar *et al.*,  
10 2021c) have not influenced the practice to the desired extent, or there is an urgent need to  
11 develop studies such as ours which explore how social marketing practice is undertaken  
12 globally to understand more deeply the gap between what is theoretically argued and what is  
13 practiced in reality. The relevance of the existing frameworks needs to be explored to  
14 understand whether the issue is obsolescence/lack of relevance or the maturity of practice in  
15 various social contexts.  
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27 Various authors have identified a need to unpack practitioner-centric elements that contribute  
28 to the process of behavior change (Willmott & Rundle-Thiele, 2022) and a need to present  
29 benchmarks of the process that will lead to the increased likelihood of behavior change  
30 (Aceves-Martins *et al.*, 2016; Xia *et al.*, 2016). Similarly, the observation of Wettstein & Suggs  
31 (2016) argues that the presentation of procedural factors enhances the likelihood of behavioral  
32 outcomes. This study advances these conversations further and proposes a two-stage taxonomy  
33 for understanding success in social marketing practice (see Figure 1).  
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Figure 1 Two-Stage Taxonomy for Measuring Success in Social Marketing Practice





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3 The proposed taxonomy emerges based on the two stages in which we categorized our findings:  
4 A) how success is measured in current social marketing practice and B) conceptual  
5 understanding of what success means for future practice.  
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10 In terms of measurement, the findings do not provide any evidence that practitioners measure  
11 success beyond reach, awareness, and engagement. In conceptualization, however, dialogue  
12 with social actors, social proof, and behavior change gain prominence. The authors have picked  
13 up the components identified by participants in their data and set these as benchmarks for  
14 practice (Figure 1). These benchmarks are placed across the perceptive divide of social  
15 marketing success measurement and conceptualization. The resultant taxonomy combines the  
16 puzzle pieces by bridging the divide and clarifies that success in social marketing is an ongoing  
17 and contextually dependent process.  
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24 While stage A is currently evident in practice, the authors argue the need for stage B to be  
25 incorporated into current practice if social marketing success is to be measured in its true sense.  
26 For this to be a reality, we include a continuum within stage B ranging from change in targeted  
27 behaviors to sustained change in behaviors. Policy change is included as an outlier in a dotted  
28 box. Although our data do not directly point at policy change as the ultimate goal, policy change  
29 occurs at the upstream level (McHugh & Domegan, 2017) when public bodies and  
30 governments enact supporting mechanisms and policies at the macro level based on the  
31 evidence of sustained, successful behavior changes. For better funding support (particularly  
32 from public bodies that are policy-oriented), social marketing practitioners need to measure  
33 success in terms of sustained behavior change (long term) and not in the short term (stage A).  
34 The evolution of practice in this regard will allow policymakers to better inform their policy  
35 from practice that leads to meaningful outcomes in society. Policy bodies will benefit from  
36 better practitioner insights on various campaigns and can amend and adapt their policy to, in  
37 turn, make practice more efficient and successful. The authors are taking an inductive stance  
38 when including policy change as an outlier by taking a broader view of the literature (such as  
39 Kennedy and Parsons, 2012; Truong, 2017; Flaherty *et al.*, 2020) from the lens of our findings.  
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53 Funding bodies need to consider a sustainable, long-term financial strategy when funding  
54 programs; this will allow practitioners to measure long-term behavior change as an outcome  
55 and reduce the emphasis on short-term results. Therefore, funding must be consistently  
56 maintained across stage B. The funders' role and power, critical to social marketers' short-term  
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3 view of measuring success, must change. While the conceptualization of social marketing  
4 success has behavior change as the ultimate objective (Dibb & Carrigan, 2013), the  
5 practitioners' view of policy change/formulation, as found in this study, maybe the incentive  
6 required to refine their success measurement practice.  
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11 Based on our findings, we believe that the measures of inputs and reach would feed into the  
12 awareness-building stage. Measures of engagement would feed into actions leading to behavior  
13 change and dialogue with social actors who support engagement. Similarly, output measures  
14 would map to social proof, and outcomes measures would map to sustained behavior change  
15 and policy change or formulation, wherever necessary.  
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## 20 21 **Conclusion**

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24 The study finds that social marketing success needs to be broken down into more frequent  
25 battle wins, with a view that ultimate behavior change means winning the war. Success and  
26 measures should be devised specifically at each stage of the taxonomy to give the practitioner  
27 scope to learn and change the social marketing program. Appropriate metrics should be adopted  
28 to identify the achievement of each stage. Funders must adopt a longer-term view and remain  
29 patient and resilient while accepting that true social marketing success is a waiting game. The  
30 budgetary provisions should be consistent with this long-term view. This, in our opinion, will  
31 provide the necessary space for practitioners to objectively measure process, outcome, and  
32 behavioral measures and determine whether the program was a holistic success. At the latter  
33 stages of the taxonomy, practitioners must consider a broader stakeholder role in social  
34 marketing success. While considered the ultimate objective, positive behavior change needs to  
35 be repositioned prior to policy change at the socio-ecological level, as found in this study.  
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## 45 46 **Limitations**

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48 This study has some limitations. One limitation is the sample size. Even though a sample of 48  
49 participants is considered satisfactory for a qualitative study (Bogner *et al.*, 2009; Flick *et al.*,  
50 2018) based on participants' experience in the subject under discussion (Vasileiou *et al.*, 2018),  
51 our findings cannot be generalized. Yet, participants' responses still provide valuable insights  
52 in line with qualitative research objectives, particularly as the collected data draws upon  
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3 notable experts in social marketing. In addition, the selected sample accurately represents a  
4 small, globally disseminated social marketing community (Lee, 2020).  
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8 Moreover, the sample includes mostly Western scholars with some representations from the  
9 Middle East (such as Saudia Arabia, Jordan, Kuwait, Israel, and Oman) and Asia (such as India  
10 and China). This can be recognized as a limitation, considering social marketing is criticized  
11 for Western predominance in its scholarship (Gordon *et al.*, 2016; Cateriano-Arévalo *et al.*,  
12 2022). Further studies can adopt a more non-Western lens on knowledge to evaluate success.  
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18 Another limitation of this study is that our findings solely represent the view of social  
19 marketing academics and practitioners. Other actors involved in social marketing interventions,  
20 such as beneficiaries and/or stakeholders, may have a different perspective on success. For  
21 example, social movements tend to associate the success of social protests with structural  
22 changes in society. This notion of success is aligned with their political view of social life  
23 (Hanna *et al.*, 2016).  
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28  
29 Finally, we acknowledge that our two-stage taxonomy to understand success in social  
30 marketing needs validation. This could be achieved by encouraging social marketing  
31 practitioners to adopt a longer-term approach to understanding and looking for success during  
32 and at the end of their social marketing interventions. We believe that one important step is  
33 distinguishing the measure of success from success per se.  
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**Response to reviewers' comments**

- We thank both reviewers for taking the time to review the revised manuscript.
- The requested changes by reviewer 2 are presented in the red text within the manuscript.

<b>Reviewer 2</b>	
I hope my comments provide you with constructive feedback to further strengthen this paper. Best of luck with your research.	Thank you.
<p>The discussion of success at different levels of intervention, downstream, meso, upstream, systems social marketing is helpful. It seems that for meso, upstream and systems social marketing, although success is defined more broadly, this is still linked to behaviour change. It would have been useful to see some reflection here on whether the literature notes any consideration of structural change/systems change as success.</p> <p>You note that we need to distinguish between monitoring, evaluation and measuring success and that success is more than being effective. Yet in the section on 'midstream, upstream and systemic level' you focus on how the literature covers effectiveness in such interventions. This seems to contradict your earlier argument about the need to reflect on what success is beyond effectiveness.</p>	<p>Thank you for your suggestion. We acknowledged this point and added reflection on page 8.</p> <p>We acknowledged this point and added a sentence on page 7 at the start of <i>Success at the midstream, upstream, and systemic level</i>. This highlights that sometimes effectiveness is used as a measure of success even at up-stream level.</p>

<p>1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19</p> <p>You note that measuring success at the policy and process level is still limited, is it also the case that in systems, midstream and upstream social marketing there is also a dearth of research on measuring success? If that is the case, this should be acknowledged more clearly in the paper.</p> <p>Evaluation models: Although I was not expecting to see a full review of evaluation models in social marketing, which you note that would be beyond the scope of this paper, some consideration of evaluation traditions and their limitations in social marketing versus the measuring success approach that you are advocating for would be highly relevant for the argument you are presenting in this paper.</p>	<p>We acknowledged this point and added reflection on page 8.</p> <p>We acknowledged this point and added reflection on page 6.</p>
<p>20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46</p> <p>Some reflection on the sample size and the Western predominance is still warranted. Particularly given the point you make on page 9 stating that success was mostly documented in a Western context. One cannot ignore the fact that in your work, success is defined by experts who tend to represent the Western world, adopting a Western lens on knowledge. This limitation should be recognized.</p> <p>On page 6 you state: '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'. Was this also a potential risk in your research? How did you address this potential limitation?</p>	<p>Thank you for your suggestion. We acknowledged this on page 26.</p> <p>This is an important point. We already highlighted that our sample only includes social marketing academics and/or practitioners. Reflecting on the respondents' profile, it is clear that our sample includes individuals who are fully aware of social marketing applications and have been practicing</p>

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	social marketing for a while. It is unlikely that these individuals see social marketing as a communication approach to behaviour change.
<p>Thank you for restructuring this section. I think this reads more clearly. There are some points that require some further attention. Engagement as one dimension of short-term success, seems to be defined from a marketing communications perspective. This should be clarified in the discussion of findings as measuring stakeholder engagement, another outcome of midstream or systems social marketing, would be different. From your results it seems that practitioners tend to talk about campaigns only and there is limited reference to more complex programmes and interventions. Doesn't this also influence how participants view success given the scope and size of the social marketing initiatives they have experience with?</p> <p>On page 18, you state that action at the midstream level involves coalitions with family and friends. Is this based on participants accounts, as this is a limited perspective on midstream interventions which involve many other actors at the meso level.</p>	<p>We agree with the point raised here and the section A of our findings present a reference to communication team suggesting limited view of success in terms of awareness or engagement. However, in section B of the findings participants also highlighted the significance of engaging wider stakeholders for measuring success informing the Stage B on the proposed taxonomy. It is also important to understand that our sample involved SM experts from six different sub-continent playing various roles in different organizations, each with a different purpose, setting objectives of interventions. Hence measuring success is <i>contextual</i> to the case of every individual and the purpose of their organization (stated on page 13).</p> <p>Thank you for highlighting this, a correction is being made on page 18.</p>

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Your discussion/conclusions section could be stronger by engaging more with the critical and systems approaches literature that you are building upon in your literature review. In general, integrating more literature in these sections would help to strengthen your contribution. How does your work contribute to these bodies of knowledge which argue for broadening the scope of social marketing and challenging the status quo for transformative social change?

Thank you for your suggestion, it is considered in the proposed taxonomy section.