**Critical Review on Social Marketing Planning Approaches** 

### **Abstract**

**Purpose** – This paper presents the first attempt to map and critically review existing social marketing planning approaches.

**Approach** – Critical literature review.

Findings – The discussion highlights that existing social marketing planning approaches have moved on from older product-driven models towards a more customer/citizen-oriented, stakeholder engagement and value creation narrative. There is also a growing connection between social marketing planning approaches and theories from other disciplines. This recognises that a simple push marketing strategy, which was the working principle of many early social marketing-planning approaches, is not often effective for contemporary social marketing practice. Effective social marketing planning requires a greater emphasis on new social marketing principles derived from the new global consensus social marketing definition such as more citizen focus, sustainable outcomes, and ethical practice. Thus, highlighting a need for more comprehensive social marketing planning approaches with a better understanding of recent theory development of social marketing as a field in order to be relatable and efficient.

**Implication** - The review sets out some original thinking about how planning in the field of social marketing can be strengthened through a more inclusive adoption of both system thinking analysis and integration with other fields of theory and practice that are seeking to influence behaviour for social good.

**Limitations** – This review is exploratory in nature and evaluates only 14 social marketing planning approaches; more social marketing approached exist and could be considered in further reviews.

**Keywords** - Social Marketing, Planning Approaches, Behaviour Change, Intervention, Customers

### **Background**

The emergence of various themes in social marketing (see figure 1) shows that the identity of the field is continuously evolving, but the field remains at its core the application of marketing principles to deliver planned behaviour change strategy focused on creating social good (Saunders, Barrington and Sridharan, 2015; Lee & Kotler, 2011).

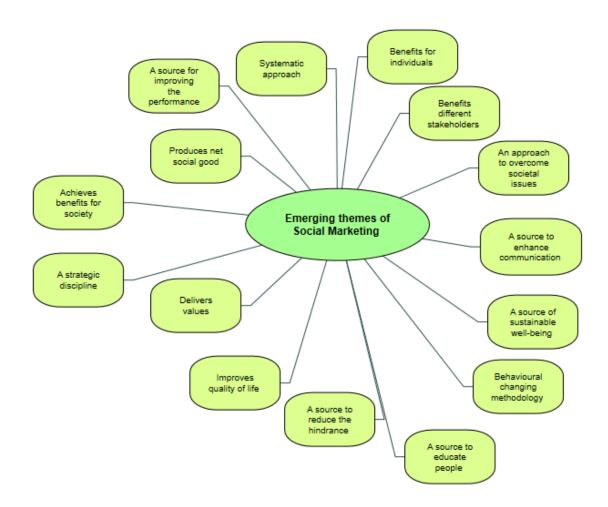


Figure 1 Social Marketing's Emerging <u>Themes</u> - Sources (Kotler & Zaltman, 1971; Andreasen, 1995; Lee et al., 2011; Lefebvre, 2011; French, 2010; Donovan, 2011; Newton-Ward, 2010; Rundle-Thiele, 2014; iSMA, ESMA and AASM, 2017).

The evolution of the field has resulted in some social marketing planning approaches being developed to design successful interventions (French & Russell-Bennett, 2015). Social marketing appears to be a powerful set of organising principles and mechanisms to link the knowledge generated by behavioural science and a range of other fields about human behaviour. With our understanding of the design, implementation and management of effective programmes of action drawn from the field of management and marketing (French & Gordon, 2015; Lee, Rothschild, & Smith, 2011). Moreover, social marketing is mainly concerned with the analysis of the intended social consequences of marketing strategies, policies, promotional activities and marketing decisions (Stead, Gordon, Angus, & McDermott, 2007) However, social marketing is not a theory in itself, insights are taken from other bodies of knowledge such as anthropology, psychology, communication theory and sociology to influence behaviour (French & Russell-Bennett, 2015; Lefebvre, 2011; Lefebvre, 2000).

It is noted that currently there are limited sources available to guide practitioners about which social marketing planning approach is suitable for which social problem and in what type of situation (Lefebvre, 2000; Luca & Suggs, 2013; Lefebvre, 2011). Moreover, many social marketers believe that social marketing planning approaches need updating and it is time to rethink, rebrand and refocus the field (Wood, 2012; Lefebvre, 2012; Brennan & Lukas, 2014). Building on the position of Wood (2012), Lefebvre (2012), Brennan & Lukas (2014), this paper aims to critically review existing social marketing planning approaches in order to identify their main strengths and limitations. Secondly, an attempt is made to identify whether existing social marketing planning approaches are consistent with the global definition of social marketing (iSMA, ESMA and AASM, 2017).

*Note:* As there are several names for social marketing planning methodologies such as models, criteria, principles, process, framework and features, for consistency while referring to these methodologies during the discussion, the word 'social marketing planning approaches' is used

throughout. The authors define the following terms, which are used in the discussion to aid readers in understanding the analysis set out.

- *Push marketing strategy*; a promotional strategy that pushes products/services/ideas to consumers through relevant distribution channels (Brocato, 2010).
- *Pull marketing strategy*; a promotional strategy that focuses on consumers by enabling them to pull the product/service/ideas (Brocato, 2010).
- *Upstream social marketing*; a wider approach to social marketing that works at the macro level that takes place to influence policy makers (Dibb, 2014; Wood, 2016a).
- **Downstream social marketing**; a social marketing approach that operates at the micro level to influence/change at an individual or small group level of behaviour (Wood, 2016a).
- Consumer-driven marketing strategy; a strategy focused on identifying consumers' needs and define products/services' specification accordingly (Gebauer & Kowalkowski, 2012; Rustogi, 2007).
- **Product-driven marketing strategy;** a strategy that first focuses on products/services development then identifies suitable audiences for these products and services (DeMarais, 2014).

### **Discussion**

After a review of the existing literature on social marketing, the following 14 social marketing planning approaches were selected and considered for this review.

- 1. Wiebe five principles (Wiebe, 1952).
- 2. Chandy et al.'s seven-stage criteria (Chandy et al., 1965).
- 3. Kotler and Zaltman's planning system (Kotler and Zaltman, 1971).

- 4. MacFadyen et al.'s four unique features of social marketing (MacFadyen et al., 1999).
- 5. MOA-EML framework (Rothschild, 1999).
- 6. Andreasen's benchmark criteria (Andreasen, 2002).
- 7. CDCynergy model (The Centre for Disease Control USA, 2005).
- 8. MacFadyen et al.'s use of wider determinants in social marketing planning (MacFadyen, Stead and Hastings, 2002; Hastings, 2007).
- 9. Weinreich's social marketing process (Weinreich, 2010).
- 10. Kotler and Lee's planning model (Lee & Kotler, 2011).
- 11. Robinson-Maynard, Meaton and Lowry's 19 step criteria (Robinson-Maynard, Meaton, & Lowry, 2013).
- 12. The COM-SM model (Tapp & Spotswood, 2013).
- 13. STELa planning model (French & Apfel, 2015).
- 14. The hierarchical model of social marketing (French & Russell-Bennett, 2015).

### Wiebe's five principles (1952)

Wiebe identified a set of five principles (given in table 1) to design a social marketing intervention after analysing four USA based radio and television social programmes. This analysis concluded that social programmes are conducted in 'un-market-like' circumstances; therefore, the outcomes are not always very effective (Wiebe, 1952). Wiebe (1952) reflected that the more similarities these social programmes had with traditional marketing, the more successful they were likely to be. Wiebe's (1952) early development of five planning principles set the foundation for other academics to explore the deeper layers of social marketing by introducing new ideas, such as social mechanism, adequacy, compatibility and the need to set clear behavioural goals to help people achieve success in social programmes. However, because of their generic nature, the five principles for effective social change failed to set a

definitive planning benchmark for later researchers (Kotler & Zaltman, 1971). Moreover, Wiebe's (1952) work is conceptual, and does not offer insight into each principle, and lacks clear direction as to how to monitor progress and measure results. For example, the 'force' element generically indicates an individual's motivation but does not include details about the factors that motivate an individual to respond to a social programme, whereas in commercial marketing it is essential to identify such factors (Svatosova, 2013).

Table 1 Wiebe's five principles for a successful social campaign- Source (Wiebe, 1952)

Principles	Explanation
Force	The intensity of a person's motivation towards the goals of social
	campaigns
Direction	Knowledge of how and where to respond to the message of social
	campaigns
Distance	An estimation of the time, cost and energy required to engage with the
	social campaign
Adequacy and	The effectiveness and ability to help people to achieve the campaign's
compatibility	behavioural goals
Social mechanism	A platform for the people to translate their motivation into action
	regarding the social campaign.

Although these principles were simple to operationalise, a further limitation is that they lacked empirical evidence. In addition, Wiebe's principles do not include fundamental marketing concepts such as the marketing mix, segmentation, targeting and positioning (Ling, Saludin, & Mukaidono, 2012). There is also no implementation guidance on how to conduct a market or consumer analysis to gather knowledge about the needs of consumers and market trends. This contradicts with early assumptions of Wiebe's (1952) that social programmes must be associated with the principles of traditional marketing. However, Wiebe (1952) identified that to design a successful social programme there must be a focus on the operation side. For example, it is essential to estimate how much energy, time and cost are required to engage with the social mechanism. Though, sequential order of these principles could add clarity regarding the start and end of the social change process.

### Chandy et al.'s seven-stage criteria (1965)

After almost 13 years of Wiebe's (1952) five principles to design a social programme, Chandy et al. (1965) proposed seven-stage criteria for a successful social marketing programme focused on contraception in India. The stages comprise of:

- 1. Conducting consumer research
- 2. Sourcing the products
- 3. Branding and packaging
- 4. Advertising and promotion
- 5. Distribution
- 6. Pricing
- 7. Cost-benefit analysis

Many of these criteria are drawn from commercial marketing principles, supporting Wiebe's (1952) view that a social marketing programme must resemble traditional marketing. However, integration of consumer research, branding and cost-benefit analysis were revolutionary at the time. The inclusion of such criteria resulted in evidence suggesting that contraceptive interventions in India were more successful and cost-effective when delivered through community-based distribution approaches instead of clinic-based distribution systems, resulting in high utilisation and less wastage of condoms (Harvey, 1999). The idea of branding in Chandy et al.'s (1965) criteria strengthens the link between social marketing and conventional marketing. In conventional marketing, branding is used to promote the brand and build a relationship with target customers. Recent justification by Gordon, Zainuddin & Magee (2016) suggests branding in social marketing is also used to promote tangible products when they exist, such as condoms or reusable water bottles.

Branding in social marketing is also used to create loyalty and a relationship to a social issue, for example, people who take up recycling often go on to act as advocates for recycling

with others (Evans et al., 2007). According to Aaker (1996) branding primarily aims to benefit organisations rather than consumers which contradicts social marketing principles, i.e. branding is not customer-driven (French, 2017). Yet Chandy et al.'s (1965) use of branding in contraception programmes in India aimed to improve customers' awareness and engagement which was a first sequential approach with a clear beginning and end.

Each activity in Chandy et al.'s (1965) criteria was only explored once rather than focusing on frequent consumer research. In addition, Chandy et al.'s (1965) planning criteria do not offer explanatory commentary for each of the steps/processes for implementation and have not been widely adopted. Even though the estimation of resources was earlier mentioned by Wiebe (1952), Chandy et al.'s (1965) criteria offered further significance on cost estimation and perceived benefits (David, Ngulube, & Dube, 2013).

### Kotler & Zaltman's planning system (1971)

Kotler & Zaltman's (1971) social marketing planning system (given in figure 2) was developed almost six years after Chandy et al.'s (1965) criteria. The key strengths of Kotler & Zaltman's (1971) planning system are that it is based on a systematic and continuous feedback mechanism to improve the effectiveness of the outcomes of a social programme. However, the only difference noted between this model, and a standard marketing model is the method of research. Kotler & Zaltman's (1971) planning system incorporates the marketing mix theory as planning variables with the administrative process and encourages practitioners to gather continuous information from the external environment (including from competitors) and aims to inform and influence target audiences through a push marketing communication approach (Corniani, 2008).

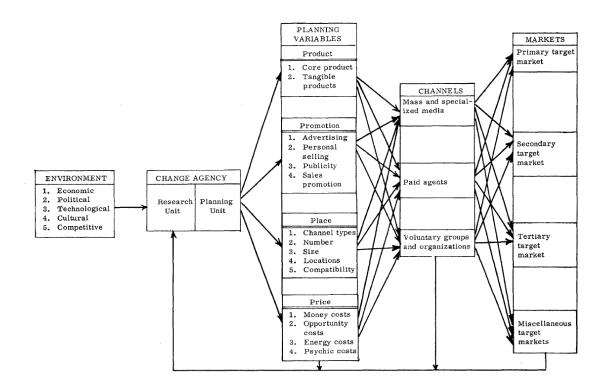


Figure 2 The social marketing planning system - Source (Kotler and Zaltman, 1971)

A limitation of this model is that it failed to identify how behaviour would be influenced as it does not offer any link with behaviour change theories. However, unlike Wiebe's (1952) principles, this planning system integrates a monitoring mechanism that enhances the potential effectiveness of the outcomes and the overall process. Though many elements of Kotler & Zaltman's (1971) planning system require further explanation, for example, what are psychic costs? who will be the change agents? and how research and planning should be managed. In addition, all the planning variables are linked to all channels, and all channels are linked to all markets which may not be the case in all behaviour change or social programmes.

The model also assumes that the social programme owner has financial resources for research and planning similar to that of a large commercial organisation, which may not always be readily available for non-profit organisations. Despite these issues, Kotler & Zaltman's system was applied to several social marketing programmes. One successful example is the defensive driving social campaign conducted by the National Safety Council USA given in figure 3 (Kotler & Zaltman, 1971). However, the system recognised by Kotler & Zaltman

(1971) cannot be clearly identified in the National Safety Council USA's example. It is also worth mentioning that even though Kotler & Zaltman's (1971) planning system for designing and running a social programme sets out the first visual representation of the process, it does not offer exclusive empirical evidence to support the recommended approach. A reason for this could be that the proposed planning system is difficult to operationalise and at the time required further evidence about the plausibility of the system proposed.

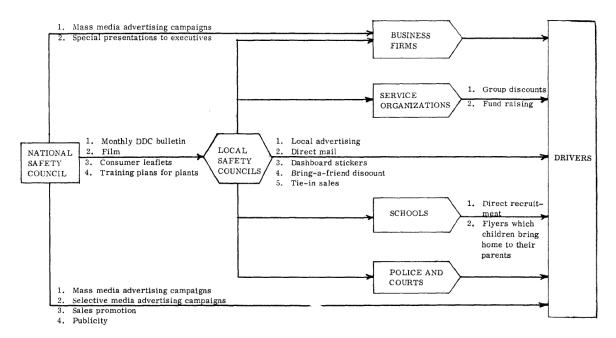


Figure 3 Defensive driving course and marketing channels and tools used - Source: (Kotler and Zaltman, 1971)

# MacFadyen et al.'s four features (1999)

To enhance the effectiveness of the social programme, MacFadyen, Stead, & Hastings (1999) identified four unique features:

- 1. When it comes to voluntary behaviour change, social marketing does not support the idea of enforcement or coercion.
- 2. If change is to occur, there must be a clear benefit for the customers.

- 3. Various marketing techniques must be used, such as segmentation, targeting and positioning, customer-oriented research and the marketing mix to pursue the social marketing plan.
- 4. Results must be recognised through the improvement of individuals' welfare and society, not the benefits to the organisation.

These features were observed after 28 years of Kotler & Zaltman's (1971) planning system and can be interpreted as an opposing method to a purely push marketing strategy which was a feature of both Kotler & Zaltman's (1971) system and Wiebe's (1952) principles. However, MacFadyen et al.'s (1999) contribution maintained a focus on voluntary behaviour change as a key principle. Moreover, these social marketing planning features appear to be consistent in terms of a focus on using traditional marketing principles such as segmentation, targeting and position and the marketing mix theory for behaviour change. The idea of being customerdriven, meeting customers' needs and maintaining effective customer relations and service programmes (Cai, 2009), shows that the discussion among social marketers at this time had begun to change from an organisation-focus approach (i.e., product-driven) towards an approach that considers the broader benefit to individuals and society. However, these features of social marketing remain limited regarding detailed guidance for social change practitioners, and negligible empirical evidence of practice. It is noted that MacFadyen, Stead, & Hastings' (1999) four features clearly depict Kotler & Zaltman's (1971) definition of social marketing that social marketing is about achieving benefits for society by using the application of marketing concepts.

# MOA-EML model (1999)

The need to focus on creating benefits to society as well as benefits to specific target audiences recognises that many people are strongly influenced by social, economic and other factors

which result in them being unable to comply with behaviour change objectives (Tsai, 2007; Lee, Rothschild & Smith, 2011; Webster & Lusch, 2013). In recognition of this, Rothschild (1999) proposed a normative MOA-EML planning framework (motivation, opportunity, ability - education, marketing, law) given in figure 4, which suggest a modification to the behaviour of individuals through MOA-EML is a viable vehicle for the development of strategies linked with social behaviour change processes and planning.

MOTIVATION	yes		yes no		
OPPORTUNITY	yes	по	yes	no .	
ABILITY	1	2	3	4	
yes	prone to behave	unable to behave	resistant to behave	resistant to behave	
	education	marketing	law	marketing, law	
	(5)	6	7	8	
	unable to behave	unable to behave	resistant to behave	resistant to behave	
no	education, marketing	education, marketing	education, marketing, law	education, marketing, law	

Figure 4 MOA-EML framework - Source (Rothschild, 1999)

The MOA-EML model is the first social marketing model that introduces the element of legislation and education in a behaviour change setting. Nonetheless, it is not clear whether these elements are associated with only down-stream (Wood, 2016b). The MOA-EML model is specifically designed to identify how to change behaviour by focusing on promoting motivation, increasing opportunity and ability to adopt the desired behaviour through a pull marketing communication strategy with a special emphasis on consumer-driven strategy. On the other hand, the MOA-EML model does not specifically identify which strategies are related to marketing, education and law and which sequence or combination should be used to achieve the desired behavioural outcomes. A further limitation of this model is set out by Binney, Wayne & Hall (2007) who argue that the relationship between motivation and behaviour is

more complex and can be different in different behaviour change interventions than the MOA-EML model suggests. Conversely, it is worth mentioning that this model is radically different from previous models as it is focused principally on influencing behaviours rather than applying marketing principles.

The MOA-EML model has the advantage of being easy to understand, and it can also be used as an aid to segmentation and consumer research through the identification of MOA factors influencing group behaviour. However, the model offers less guidance about what type of marketing strategies to use, which could be seen to be unhelpful as these elements are context dependent. Consequently, those using MOA-EML model have to do a lot of extra thinking about how to apply it. Furthermore, it is not clear what, or if there is a set order of priority about the application of marketing, education or law and to gain wider uptake. Finally, this approach like those already discussed requires further evaluation and empirical evidence about its utility (Binney, Wayne & Hall, 2007).

### Andreasen's benchmark criteria (2002)

Andreasen's (2002) benchmark criteria (see table 2) is the first contribution to social marketing theory in the 21<sup>st</sup> century with a consideration of both upstream and downstream factors. Yet, the criteria themselves do not define which factors contribute towards upstream and downstream social marketing. A key strength of Andreasen's criteria is succinct and easy to understand the way to establish a useful baseline about how to measure social programmes' planning strengths. These criteria also recognise the need to understand consumers' behaviour more than earlier social marketing planning approaches. Unlike earlier social marketing planning approaches, Andreasen's (2002) criteria feature the need for an exchange process to motivate consumers to engage with social change. The element of motivation was earlier observed in MOA-EML model of social marketing; however, Andreasen (2002) offers more

details on motivation, for example how to motivate people to influence their behaviours through tangible or intangible rewards.

Table 2 Andreasen's benchmark criteria for social marketing – Source (Andreasen, 2002)

Benchmark	Explanation		
Behaviour change	The intervention seeks to change behaviour and has specific,		
	measurable behavioural objectives		
Consumer research	Intervention is based on an understanding of consumer		
	experiences, values and needs. Formative research is conducted		
	to identify these. Intervention elements are pre-tested with the		
	target group.		
Segmentation and	Different segmentation variables are considered when selecting		
targeting	the intervention target group. The intervention strategy is tailored		
	for the selected segment(s).		
Marketing mix	Intervention considers the best strategic application of the		
	'marketing mix'. This consists of the four Ps of 'product', 'price',		
	'place' and 'promotion'. Other Ps might include 'policy change'		
	or 'people' (e.g. training is provided to intervention delivery		
	agents). Interventions which only use the promotion P are social		
	advertising, not social marketing.		
Exchange	Intervention considers what will motivate people to engage		
	voluntarily with the intervention and offers them something		
	beneficial in return. The offered benefit may be intangible (e.g.		
	personal satisfaction) or tangible (e.g. rewards for participating in		
	the programme and making behavioural changes).		
Competition	Competing forces to behaviour change are analysed. Intervention		
	considers the appeal of competing behaviours (including current		
	behaviour) and uses strategies that seek to remove or minimise		
	this competition.		

Moreover, these criteria have been successfully applied in interventions in areas such as alcohol, drug use, tobacco and teenage pregnancies (Stead et al., 2007; Gordon, McDermott, Stead, & Angus, 2006). However French & Russell-Bennett (2015) criticise Andreasen's work, stating it lacks clarity regarding whether any of the criteria are mandatory for social marketing interventions. Andreasen states, "At this stage of social marketing development, I do not argue that programmes [sic] must have all six elements in strong measure to qualify for the label Social Marketing" (2002, p. 27). However French & Russell-Bennett (2015) suggest that on a close reading of Andreasen's description of social marketing, exchange; insight (consumer

research) and behavioural focus can be seen as Andreasen's essential elements. Building on Andreasen's (2002) original criteria, French & Blair-Stevens posed another set of benchmark criteria in 2006, which clarifies some of the vagueness of the Andreasen's original elements (see table 3).

Table 3 French and Blair-Stevens 2006 criteria – Source (French & Russell-Bennett, 2015)

Benchmark	Explanation
1. CUSTOMER	'Customer in the round' Develops a robust understanding of the
ORIENTATION:	audience, based on good market and consumer research, combining
	data from different sources.
2. BEHAVIOUR:	Has a clear focus on behaviour, based on strong behavioural analysis,
	with specific behaviour goals.
3. THEORY:	Is behavioural theory-based and informed, drawing from an integrated
	theoretical framework.
4. INSIGHT:	Based on developing a deeper "insight" approach focusing on what
	"moves and motivates".
5. EXCHANGE:	Incorporates an "exchange" analysis. Understanding what the person
	has to give to get the benefits proposed
6. COMPETITION:	Incorporates a "competition" analysis to understand what competes
	for the time and attention of the audience.
7.	Uses a developed segmentation approach (not just targeting) to avoids
SEGMENTATION:	blanket approaches.
8. METHODS	Identifies an appropriate "mix of methods".
MIX:	

French & Blair-Stevens (2006) revised Andreasen's benchmark original criteria after an extensive review of global social marketing practices. The conclusion of their review included two more components, namely 'insight driven', which focuses on developing insight into the motivation of target audiences and the criteria of 'theory based and informed'. These criteria emphasise the importance of improving the understanding of behaviour through the use of behavioural theories (French & Mayo, 2006). This addition further supports the need for consumer research and a deep understanding of factors influencing behaviour. More so, the need for a broad contextual understanding of these factors and how they interact in a social marketing context is required. This set of criteria has been further updated, with the most recent

update in 2012. A comparison of French & Blair-Stevens 2006 criteria and French 2012 updates (see table 4) highlights the change from a focus of customer-orientation (individual interest) to citizen-orientation (community interest) in the social marketing setting must be considered to enhance the effectiveness of social marketing practice (French & Russell-Bennett, 2015).

Table 4 Comparison of two benchmark criteria approaches - Source (French & Russell-Bennett, 2015)

French and Blair-Stevens (2006) criteria	French's (2012) update
1. CUSTOMER ORIENTATION:	CITIZEN ORIENTATION: Understanding
'Customer in the round' develops a robust	the audience, based on research, combining
understanding of the audience, based on	data from different sources and perspectives.
good market and consumer research,	
combining data from different sources.	
2. BEHAVIOUR: Has a clear focus on	
behaviour, based on strong behavioural	
analysis, with specific behaviour goals.	
3. THEORY: Is behavioural theory-based	THEORY: The behavioural theory is used to
and informed, drawing from an integrated	assist the development implementation and
theoretical framework.	evaluation of programs.
4. INSIGHT: Based on developing a deeper	
"insight" approach focusing on what "moves	
and motivates".	
5. EXCHANGE: Incorporates an "exchange"	EXCHANGE/VALUE: Incorporates an
analysis. Understanding what the person has	"exchange" analysis that provides an
to give to get the benefits proposed	understanding of the costs and benefits
	associated with target behaviours and the
	development of possible interventions
6. COMPETITION: Incorporates a	COMPETITION: Has two elements:
"competition" analysis to understand what	competition analysis to understand what
competes for the time and attention of the	competes for the time and attention of the
audience.	audience and "competition planning" to
	reduce the impact of these factors.
7. SEGMENTATION: Uses a developed	SEGMENTATION: Identifies groups who
segmentation approach (not just targeting) to	share similar views and behaviours and can
avoids blanket approaches.	be influenced in similar ways.
8. METHODS MIX: Identifies an	METHODS MIX: Brings together the most
appropriate "mix of methods".	effective mix of interventions to influence
	the target behaviour.

### CDCynergy planning model (2005)

CDCynergy is a planning methodology for health communication planning and implementation; its social marketing edition was introduced in 2005 (Centre for Disease Control USA, 2005). CDCynegy social marketing planning model was the first computer-based programme that includes six planning stages, given in figure 5. The model has mainly been used for health projects, and its main strengths are its comprehensive nature, offering a detailed explanation of each stage of the process and supportive resource materials for each stage for practitioners. It focuses however on influencing individual behaviours rather than social policy (French, 2017).

CDCynergy model offers detailed tutorials, case examples, and a wealth of resources, diverse media library and cumulative evaluation plan (Centre of Disease Control USA, 2006), however, evidence of utility in practice is not conclusive. Going through various phases and subsections of each phase provide evidence for the link between the CDCynergy model and previous social marketing planning approaches. For example, consumer research, market research, evaluation and implementation. Moreover, this model offered a detailed explanation of each phase and steps, which makes the model stronger than many previous social marketing planning approaches.

	CDCynergy Social Marketing Edition		
Process Steps			
	Phase 1: Problem Description		
Step 1.1	Write a problem statement.		
Step 1.2	List and map the causes of the health problem.		
Step 1.3	Identify potential audiences.		
Step 1.4	Identify models of behavior change and best practices.		
Step 1.5	Form your strategy team.		
Step 1.6	Conduct a SWOT analysis.		
	Phase 2: Market Research		
Step 2.1	Define your research questions.		
Step 2.2	Develop a market research plan.		
Step 2.3	Conduct and analyze market research.		
Step 2.4	Summarize research results.		
	Phase 3: Marketing Strategy		
Step 3.1	Select your target audience segment(s).		
Step 3.2	Define current and desired behaviors for each audience segment.		
Step 3.3	Describe the benefits you will offer.		
Step 3.4	Write your behavior change goal(s).		
Step 3.5	Select the intervention(s) you will develop for your program.		
Step 3.6	Write the goal for each intervention.		
	Phase 4: Interventions		
Step 4.1	Select members and assign roles for your planning team.		
Step 4.2	Write specific, measurable objectives for each intervention activity.		
Step 4.3	Write a program plan, including timeline and budget, for each intervention.		

<u>Step</u> <u>4.3a</u>	Plan new or improved services.
<u>Step</u> <u>4.3b</u>	Develop or adapt a product.
<u>Step</u> <u>4.3c</u>	Plan a strategy for policy change.
Step 4.3d	Plan communication intervention/promotion activities.
Step 4.4	Pretest, pilot test, and revise as needed.
Step 4.5	Summarize your program plan and review the factors that can affect it.
Step 4.6	Confirm plans with stakeholders.
	Phase 5: Evaluation
Step 5.1	Identify program elements to monitor.
Step 5.2	Select the key evaluation questions.
Step 5.3	Determine how the information will be gathered.
Step 5.4	Develop a data analysis and reporting plan.
	Phase 6: Implementation
Step 6.1	Prepare for launch.
Step 6.2	Execute and manage intervention components.
Step 6.3	Execute and manage the monitoring and evaluation plans.
Step 6.4	Modify intervention activities, as feedback indicates.

Figure 5 CDCynergy planning model- Source (Centre for Disease Control USA, 2005).

The CDCynergy model emphasises that social marketers must list the key causes of the social problem which needs to be changed through situational analysis. CDCynergy model also stresses the need to identify behaviour change theory to inform planning and delivery elements of the approach. Thus highlighting the systematic and visionary nature of the system. Considering the systematic nature and a long list of activities, CDCynergy model may require

a wider range of resources and expertise to develop a social marketing intervention which may be a challenge in some sections of the non-profit sector, or in public sector organisations with small budgets (Francois, 2018).

## Hastings' use of wider determinants in social marketing (2007)

In order to apply behaviour change theories in social marketing, Hastings (2007) acknowledges MacFadyen et al.'s (1999) framework (see figure 6) which adapts personal, social, psychological and cultural factors to a health behaviour context. This approach as the advantage of applying a theoretical model, which explicitly stresses other features such as the economy and environment. This model develops the assertions made by Andreasen (2002) that understanding consumer behaviour and the deep values and other social and economic factors that influence their behaviour will help shift the focus of social marketing from a product-driven to a consumer-driven approach (Corniani, 2008; Smith & Berge, 2009; Hastings, 2007).

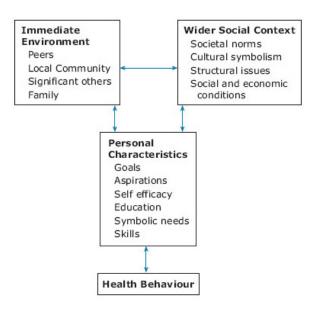


Figure 6 the wider determinants of health behaviour (Hastings, 2007)

It identifies the use of behaviour theories in a social marketing setting, but there is a gap in the literature linking and integrating insights from consumer behaviour models with social marketing approaches (Kotler & Armstrong, 2016). A criticism of social marketing is

that it has focused on delivering expert-defined solutions to expert-defined target groups rather than working with citizens to define problems, solutions and intervention approaches (Kubacki, Rundle-Thiele, Lahtinen, & Parkinson, 2015; Nguyen, Parker, Brennan, & Clements, 2014; Nicholson & Xiao, 2011). A deeper insight into the consumer's mindset is required (French, 2015). This cannot be achieved through theoretical behavioural models that lack a focus on the identification of a broad range of determinants of behaviour that go beyond personal motivation and ability (French, 2017).

This framework contributes to the use of customer-orientation and behaviour change theories in social marketing but fails to offer any details on the promotion, segmentation, communication, and implementation and evaluation side of the social programme. It also lacks empirical evidence of its utility. Similarly to the CDCynergy health communication planning model, Hasting's (2007) model is focused on changing or influencing health behaviour and does not offer any practice evidence in areas other than health.

### Weinreich's social marketing process (2010)

In 1992 Weinreich presented a social marketing six-step model, which was subsequently updated in 2010 (see figure 7). The model shows that Weinreich's social marketing process is based on a hierarchical approach, but the hierarchy of the process is not clear. For example, it is not clear whether some elements of the approach are important than others. These models follow a bottom-up sequential approach with an indication of feedback or research informing subsequent interventions. It further suggests that consumer research and environmental analyses must first be conducted to find a solution to a social problem. The next two stages offer details on how to design and test messages and how they will be promoted to reach the target audience. The remaining two stages, i.e. implementation and evaluation represent the incorporation of performance management principles (Taticchi, Tonelli, & Cagnazzo, 2010).

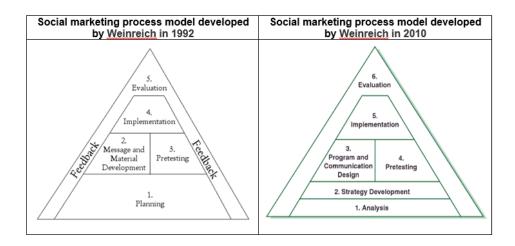


Figure 7 Social marketing process (Weinreich, 1992, 2010)

Some clarity is offered in the commentary of these models that evaluation and feedback must occur throughout the social programme not just at the end, with feedback being essential for each stage to improve. It is not clear; however what kind of feedback must be gathered and from whom. One of the strengths of Weinreich's models is that they are set out as a clear step by step process in contrast to previous social marketing planning approaches. Like Kotler and Zaltman's (1971) planning system, Weinreich's models have many of the features of generic marketing planning models without any use of behaviour change terminologies. To overcome the issue of lack of consumer focus in the social marketing process, Weinreich (2010) offers four extra Ps called the social marketing mix, i.e. public (who are the people or group), partnership (stakeholders), policy (follow organisational and/or governmental policies) and purse strings (funding) to enhance the efficiency of social campaigns. Supporting the view that social marketing programmes often require working together in partnership with organisations and communities to be successful. To tackle this issue Weinreich (2010) argues that social campaigns should target both upstream (policy makers) and downstream (public) to change the desired behaviour successfully. This social marketing mix contributes to the idea of generating funds to create a social programme. However, Weinreich's (2010) social marketing mix does not address consumers' perceptions, which others have argued are essential to a deeper understanding of consumers' behaviour (French & Gordon, 2015).

Weinreich's social marketing mix has been successfully used to design social marketing programmes in a study on the rate of use of Primary Health Care preventative services in an urban sector of Sharkia Governorate (Said, Khafagy, Ghobashi, & Fouda, 2014). Said et al. (2014) conclude that Weinreich's (2010) social marketing mix was an effective tool to design and plan an intervention to promote the utilization of El-Ebrahemia FHC preventive services. Saunders, Barrington & Sridharan (2015) argue that Weinreich's (2010) social marketing mix can be seen as a product-driven method with a specific focus on stakeholders' engagement rather than the use of consumers' engagement.

### **Kotler and Lee's planning model (2011)**

Kotler and Lee's (2011) social marketing planning model (see figure 8) incorporates all the key components from previous social marketing approaches. The model includes some new ideas such as potentially unique and meaningful benefits to influence and sustain behaviour. However, these concepts require further elaboration for them to be helpful to practitioners. This complex model has several feedback loops, yet, for the most part, it mirrors marketing plans developed by product managers for commercial organisations, which raises concerns about the rationality of this model for social marketing. For example, in commercial marketing 4Ps of marketing are mainly used for targeting and positioning, which may not be equally useful for social marketing (Goi, 2009).

#### **Executive Summary**

Brief summary highlighting the plan's purpose, target audiences, major marketing objectives and goals, desired positioning, marketing mix strategies (4Ps), and evaluation, budget, and implementation plans.

### 1.0 Background, Purpose, and Focus

What social issue is this plan intended to impact (e.g., water quality)? On what population (e.g., single-family homes) and/or solution (e.g., natural yard care) will we focus? Why? Who is the sponsor?

#### 2.0 Situation Analysis

- 2.1 SWOT: organizational Strengths and Weaknesses and environmental Opportunities and Threats
- 2.2 Key learnings from a review of similar prior efforts and additional exploratory market research

### 3.0 Target Audience(s)

- 3.1 Descriptions of priority target audience(s), including demographics, geographics, readiness to change, relevant behaviors, values and lifestyle, social networks, and community assets relative to the plan's purpose and focus
- 3.2 Market research findings providing a rationale for targeted audiences, including factors such as size, problem incidence, problem severity, defensiveness, reachability, potential responsiveness to marketing mix elements, incremental costs, and organizational match, relative to the plan's purpose and area of focus

### 4.0 Behavior Objectives and Goals

- 4.1 Behaviors that target audience(s) will be influenced to adopt (e.g., planting native plants), ones that are single and simple with lowest current penetration, highest willingness, and most potential impact
- 4.2 SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals quantifying desired behavior outcomes as well as changes in knowledge, beliefs, and behavior intent

#### 5.0 Target Audience Barriers, Benefits, the Competition and Influential Others

- 5.1 Perceived barriers and costs associated with adopting the desired behavior
- 5.2 Potential unique and meaningful benefits that will help influence and sustain targeted behaviors
- 5.3 Competing behaviors/forces/choices
- 5.4 Influence of importance to others

### 6.0 Positioning Statement

How we want the target audience to see the targeted behavior, highlighting unique benefits and the value proposition

#### 7.0 Marketing Mix Strategies (4Ps)

7.1 Product: Benefits from performing behaviors and features of goods or services offered to assist adoption

Core product: Audience-desired benefits promised in exchange for performing the behavior Actual product: Features of any goods or services offered/promoted (e.g., 100 native plants to choose from)

Augmented product: Additional goods and services to help perform the behavior or increase appeal (e.g., workshops on how to design a native plant garden)

7.2 Price: Costs that will be associated with adopting the behavior and price-related tactics to reduce costs

Costs: money, time, physical effort, psychological, lack of pleasure

Price-related tactics:

Monetary incentives (e.g., discounts, rebates)

Nonmonetary incentives (e.g., pledges, recognition, appreciation)

Monetary disincentives (e.g., fines)

Nonmonetary disincentives (e.g., negative public visibility)

7.3 Place: Convenient access

Creating convenient opportunities for audience(s) to engage in the targeted behaviors and/or access products and services, including developing partnerships for distribution channels and reinforcing desired behaviors

7.4 Promotion: Persuasive communications highlighting benefits, features, fair price, and ease of access Decisions regarding messages, messengers, creative strategies, and media channels Consideration of incorporating prompts for sustainability

### 8.0 Plan for Monitoring and Evaluation

- 8.1 Purpose and audience for monitoring progress and evaluating final results
- 8.2 What will be measured: inputs, outputs, outcomes (from Step 4), and (potentially) impact and return on investment (ROI)
- 8.3 How and when measures will be taken

#### 9.0 Budget

- 9.1 Costs of implementing the marketing plan, including additional research and monitoring/evaluation plan
- 9.2 Any anticipated incremental revenues, cost savings, or partner contributions

## 10.0 Plan for Implementation and Program Management

Who will do what, when-including partners and their roles

Figure 8 Social marketing planning process - Source (Lee & Kotler, 2011)

Interestingly, this model offers integration of the marketing mix and Lauterborn's 4Cs (i.e. Consumer wants and needs; Cost to satisfy; Convenience to buy and Communication) for the first time in a social marketing context but fails to indicate which elements of these theories are essential for a successful social marketing intervention or whether they are of equal importance. Additionally, having a focus on both organisational management and consumer perspective makes this model difficult to understand and potentially apply. However, it can be argued that an effective balance between the two theories could bring efficiency to the outcomes of social programmes. For example, the 4Ps can bring external sources, relationships

and marketing expertise to the table whereas the 4Cs can bring consideration of personal experiences, insight, relationships and authenticity.

Kotler and Lee (2011) emphasise the importance of research input at every stage which is a strength and additionally, this model offers implementation commentary, insight into the cost of various activities and overall budget management. All of which can be useful for practitioners in designing a social programme.

## Robinson-Maynard et al.'s 19 step criteria (2013)

To tackle the lack of specificity of previous social marketing planning approaches, Robinson-Maynard, Meaton and Lowry (2013) set out 19 criteria for social marketing programmes, given below;

- 1. Peer review
- 2. Formative research
- 3. Pilot testing
- 4. Questionnaires/in-depth Interviews
- 5. Piloting
- 6. Segmentation and targeting
- 7. Further segmentation and targeting
- 8. Upstream targeting
- 9. Relationship building
- 10. Clear benefits
- 11. Measurable benefits/stand up to scrutiny
- 12. Sustainability
- 13. Marketing mix/extra 'Ps.'
- 14. Multimedia initiatives

- 15. Understanding the concept of the target audience's environment
- 16. Marketers' systematic analysis of own results
- 17. Biases and flaws
- 18. Incentives
- 19. Disincentives

These criteria are based on a systematic, transparent and useful technique for designing social marketing interventions, which include pretesting, piloting and continuous evaluation channels. This supports the argument that one of the defining applications of social marketing is its systematic, rigorous and data-driven approach to designing, reviewing and evaluating social marketing interventions (French, Blair-Stevens, McVey & Merrit, 2010). A benefit of these 19 criteria is that they are comprehensive; yet, the comprehensive nature can also be seen as one of the limitations of the suggested approach. This is because many of these steps are not unique to social marketing, and the 19 components make a long list of factors that may be difficult to put into practice.

A unique feature of the 19 step criteria is that it incorporates the idea of sustainability for the first time in social marketing planning aimed at change or influence behaviours. Sustainability in the outcomes is a current focus in social marketing theory (iSMA et al., 2017; Peattie & Peattie, 2009). A weakness of this approach is that the criteria fail to set out details around the sustainability concept and how it can be operationalised to gain sustainable outcomes. It is also unclear whether the 19 step criteria aim to develop sustainability in changed behaviour or whether the emphasis is on sustainable resource allocation or both. The 19 step criteria suggest various types of research techniques to supplement market and consumer research such as peer reviews, formative research and piloting, with a special emphasis on relationship building with other stakeholders of social programmes. French & Russell-Bennett (2015) state that the set of 19 criteria is based on elements drawn from earlier social marketing

approaches with no guidance on a hierarchy of importance. French & Russell-Bennett (2015) compared Robinson-Maynard, Meaton and Lowry (2013) with Andreasen's (2002) criteria revised by French & Blair-Stevens (2006) given in table 5. It is clear from table 5 that Robinson-Maynard, Meaton & Lowry (2013) incorporated many new elements which were not given in earlier criteria. However, the 19 step criteria require explanatory guidance for the practitioners as predictors of success in social marketing.

Table 5 Robinson-Maynard, Meaton and Lowry's 19 step Criteria- Source (French & Russell-Bennett, 2015)

Robinson-Maynard, Meaton and Lowry Criteria	Comparison with French and Blair-Stevens 2006		
1. Peer review	New criteria linked to the feature of systematic planning		
2. Formative research	New criteria linked to the feature of systematic planning		
3. Pilot testing	New criteria linked to the feature of systematic planning		
4. Questionnaires/in-depth Interviews	The element of Insight criteria		
5. Piloting	New criteria linked to the feature of systematic planning		
6.Segmentation and targeting	The element of Segmentation criteria		
7. Further segmentation and targeting			
8. Upstream targeting	The element of Segmentation criteria		
9. Relationship building	New criteria linked to the feature of systematic project delivery		
10. Clear benefits	The element of Behavioural benchmark		
11. Measurable benefits/stand up to scrutiny	The element of Behavioural benchmark		
12. Sustainability	New criteria linked to the feature of systematic project delivery		
13. Marketing mix/extra 'Ps.'	The element of Methods Mix		
14. Multimedia initiatives	The element of Methods Mix		
15. Understanding the concept of the	The element of Insight criteria		
target audience's environment			
16. Marketers' systematic analysis of own results	No equivalent		
17. Biases and flaws	The element of Behavioural benchmark		
18. Incentives	The element of Methods Mix		
19. Disincentives	The element of Methods Mix		

### The COM-SM model (2013)

To replace the 4Ps with a customer-driven approach, Tapp & Spotswood (2013) suggest social behaviour change and social persuasion are complex concepts in nature and require multidisciplinary solutions. Tapp & Spotswood (2013) argue that the 4Ps of the marketing mix theory no longer represents a coherent intellectual framework for communication in social marketing contexts. Tapp & Spotswood (2013) propose the 4Ps should be replaced with a new model named COM-SM, given in figure 9. The COM-SM model is inspired by the behaviour change wheel developed by Michie, van Stralen, & West (2011). The wheel model incorporates many elements to influence or change behaviour; for example, capacity (physical, psychological), opportunity (social, physical), and motivation (cognitive, automatic). The COM-SM model also introduces the idea of 'nudge theory' and the dependence of social marketing interventions success on addressing a mix of variables. Similarly to the 19 step criteria, it may be difficult to operationalise this approach because of its complex nature. However, the scope and scale of social marketing activities are clearly set out including the need for a relationship-building approach, a feature not found in the 4Ps approach. The COM-SM model is also currently a conceptual piece of research and lacks evidence of its application and needs further development and empirical research to demonstrate its practical application. (Spotswood & Tapp, 2013).

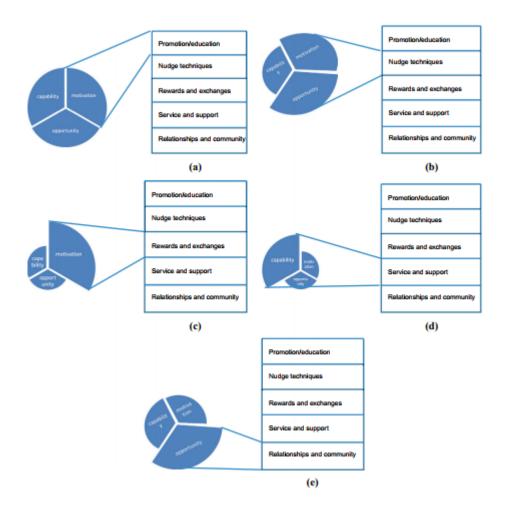


Figure 9 The COM-SM model – Source (Tapp & Spotswood, 2013)

### STELa planning model (2015)

The European Centre for Disease Prevention and Control (2014) sets out a further planning model to design behaviour change interventions called STELa; synthesised from a review of existing social marketing planning models, given in figure 10. STELa model aims to provide a simple, but comprehensive, four steps (scoping, testing, enact, learn and act) and ten tasks to social marketing programme development and management. STELa model was developed through field research as part of the development of the first technical guidance on social marketing commissioned and published by the European Centre for Disease Control (French & Apfel, 2015). In addition to the planning guidance, like the CDCynergy planning model, a benefit of the STELa model is that it includes a set of tools to help practitioners complete each

of the ten tasks. STELa model was also designed to allow flexible use rather than a stage by stage approach. Additionally, STELa model can also be applied to upstream issues as well as individual focused programmes, which differentiates it from the CDCynergy planning model that only focuses on downstream. Another strength is that it is both user-centric in nature and systematic to operationalise. The model does, however, require a considerable investment in time for the scoping stage of the process, which some practitioners may find difficult due to time and resource factors.

STEPS	TASKS	ACTIVITIES	TOOLS (see Part3)
SCOPE	Setting goals and SMART objectives	Explain what action is needed     Identify the target group and     behaviours you want to change     Set SMART objectives	Tools 1–3
	Analysing situation and influencing factors	Do situation analysis     Do competition analysis     Review evidence and data     Map and record assets	Tools 4–11
	3. Understanding target audience(s)	<ol> <li>Gather target audience insights</li> <li>Segment your audiences</li> </ol>	Tools 12–17
	Developing exchange proposition(s)	Develop behaviour promotion strategy     Make the case for compliance	Tools 18–22
	5. Selecting marketing interventions	Select interventions     Do intervention cost-benefit analysis	Tools 23–26
TEST	6. Pre-testing and piloting	Test each potential intervention and hypothesis     Report on the impact of the pilot programme	Tools 27–29
ENACT	7. Planning implementation	1. Intervention plan	Tools 30–36
	8. Initiating and managing implementation	Manage partners, risk and opportunities     Report on process	Tools 37–43
LEARN&ACT	9. Evaluating and reporting	Evaluate outcomes     Make recommendations	Tools 44–46
	10. Reviewing and building learning	Identify follow-up actions     Identify future implications	Tools 47–50

Figure 10 STELa model- Source (European Centre for Disease Prevention and Control, 2014)

The hierarchical model (2015)

A further theoretical challenge that has a direct impact on the development and implementation of social marketing planning approaches is the need for better understanding about the level of importance of elements within descriptions of what constitutes social marketing practice. Social marketing criteria developed from Andreasen (2002) to Robinson-Maynard et al. (2013)

failed to identify any hierarchy of importance. To overcome this issue, French & Russell-Bennett (2015) identified a new model for social marketing interventions, see figure 11. The hierarchical model depicts the core principle of social marketing as based on social value creation, which can be achieved through a citizen focus (initially suggested by Andreasen, 2002), relationship building (Weinreich, 2010), behaviour influence and social offerings (Andreasen, 2002).

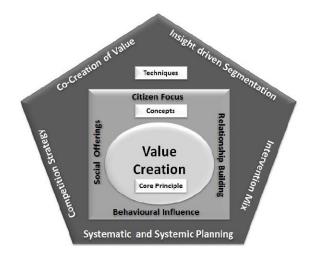


Figure 11 the hierarchical model of social marketing – Source (French & Russell-Bennett, 2015)

The hierarchical model includes various components from previous social marketing approaches and stresses an upstream social marketing approach to influence policymakers, as well as a need to focus on individuals whose behaviours are hoped to be changed (Slade, Oades, & Jarden, 2017). This model recalls the concept of service-dominant logic (SDL) offered by Vargo and Lusch (2004). According to SDL, businesses should not stay in the market only to sell goods and services to customers, but that goods/services must be seen as a way to transmit value to customers (Vargo & Lusch, 2004). The SDL model is based on co-creation of values, value propositions and service orientation, conceptually resembling the hierarchical model of social marketing; also offering the idea of value creation. The hierarchical model, however, does not offer guidance regarding sustainability in the changed behaviour, which has been a

key issue among social marketers for many years (Gordon, Russell-Bennett, & Lefebvre, 2016; Peattie & Peattie, 2009). This may be because sustainability, like evaluation, is considered a generic factor rather than an identifier of social marketing.

### A global consensus definition of social marketing

A global consensus definition of social marketing highlights five key principles,

"Social Marketing seeks to develop and 1) integrate marketing concepts with other approaches to influence behaviour that benefit individuals and communities for the greater social good. 2) Social Marketing practice is guided by ethical principles. 3) It seeks to integrate research, best practice, theory, 4) audience and partnership insight, to inform the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and 5) sustainable."

(iSMA et al., 2017).

A comparison between selected social marketing approaches and five principles from global consensus definition of social marketing is made (see table 6) which shows that only (Robinson-Maynard et al., 2013) 19 step criteria exclusively incorporated all the five principles from the endorsed definition of social marketing. Research suggests that some social marketing approaches highlighted the role of ethics and sustainability (such as French & Russell-Bennett, 2015; Rothschild, 1999 and Robinson-Maynard et al., 2013); however; the evidence is inconclusive. Research further suggested that existing social marketing approaches are either too simplistic, thereby not reflecting all the five principles from a global consensus definition of social marketing, or too complicated, making them difficult to use practice. Better social marketing planning approaches are required, which should be as simple as possible to aid application, but also robust and based on evidence and theory-supported practice including; system thinking analysis and planning, integration of theories from other disciplines and learning from previous approaches. New social marketing planning models could be designed

based on the key strengths of existing social marketing approaches (Table 7 identifies key strengths of existing social marketing planning approaches) that are consistent with the global consensus definition of social marketing and flexible enough to be useful in various social marketing settings.

Table 6 Comparison of social marketing approaches and global consensus definition of social marketing

Social Marketing Planning approaches	Integrate marketing with other approaches	Integrate research, theory and audience insight	Integrate stakeholders and competition insight	Use of ethical principles	Sustainability in the outcome
Wiebe's (1952) five principles	*	×	×	×	×
Chandy et al.'s (1965) seven stage criteria	<b>√</b>	<b>√</b>	×	×	×
Kotler and Zaltman's (1971) planning model	<b>√</b>	<b>√</b>	<b>√</b>	×	×
MacFadyen et al.'s, (1999) four features	<b>√</b>	<b>√</b>	×	×	×
Rothschild's (1999) MOA-EML framework	✓	✓	×	✓	×
Andreasen's (2002) benchmark criteria	✓	✓	<b>√</b>	×	×
CDCynergy planning model (2005)	✓	<b>✓</b>	<b>✓</b>	×	×
Hastings' (2007) health behaviour model [MacFadyen et al., (1999)]	*	<b>√</b>	<b>√</b>	×	×
Weinreich's (1992, 2010) social marketing process	✓	✓	<b>√</b>	×	×
Kotler and Lee's (2011) social marketing planning model	✓	<b>√</b>	<b>√</b>	×	×
Tapp and Spotswood's (2013) COM-SM model	✓	✓	<b>✓</b>	×	×
Robinson-Maynard et al.s' (2013) 19 step criteria	✓	✓	<b>√</b>	✓	<b>√</b>
STELa planning model (2015)	✓	✓	<b>√</b>	×	×
French and Russell-Bennett's (2015) hierarchical model	✓	✓	✓	×	×

Table 7 Strengths of existing models for inclusion in a new social marketing model

Authors	<b>Existing models</b>	Strengths (For designing a social marketing programme)
Wiebe (1952)	Five principles of successful social marketing	Operational thinking
Chandy et al. (1965)	Seven-stage criteria	<ul><li>Cost-benefit analysis</li><li>Systematic approach</li></ul>
Kotler and Zaltman (1971)  MacFedwar et al. (1999)	The social marketing planning system  Four features of social	<ul> <li>Continuous feedback mechanism</li> <li>Competition analysis</li> <li>Environmental analysis</li> </ul>
MacFadyen et al. (1999)	marketing	<ul><li>Voluntary behaviour change</li><li>Consumer-driven strategy</li></ul>
Rothschild (1999)	MOA-EML framework	<ul> <li>A systematic segmentation planning technique</li> <li>Use of marketing, law and education together</li> </ul>
Andreasen (2002)	Benchmark criteria	<ul> <li>Upstream and downstream focus</li> <li>Use of exchange theory</li> <li>Focus on clear behaviour change objectives</li> </ul>
The Centre for Disease Control USA (2005)	CDCynergy model	<ul> <li>Computer-based technique</li> <li>Focus on market research, evaluation and implementation</li> <li>Situational analysis</li> <li>Pre-testing and piloting</li> </ul>
Hastings (2007)	Health behaviour model	The inspiration for social cognitive, consumer behaviour theory and Bandura's social learning theory
Weinreich (2010)	Social marketing process and extra 4Ps of social marketing	<ul> <li>Uses performance         management tools and the         idea of including wider         stakeholders in social         marketing campaigns</li> <li>Financial resource         analysis</li> </ul>
Kotler and Lee (2011)	The social marketing planning model	<ul><li>Incorporation of 4Cs</li><li>Literature review</li><li>Budgeting</li></ul>

Robinson-Maynard et al. (2013)	19 step criteria	<ul><li>Sustainability in changed or desired behaviours</li><li>Ethical practice</li></ul>
Tapp and Spotswood (2013)	COM-SM model	Inspiration from nudge theory
The European Centre for Disease Prevention and Control (2014)	STELa model	Systematic thinking and planning
French and Russell-Bennett (2015)	The hierarchical model of social marketing	<ul> <li>Value co-creation</li> <li>Relationship building</li> <li>Service dominance</li> <li>Citizen focus</li> </ul>

### Conclusion

The review set out in this paper highlights that there is growing evidence that earlier social marketing planning approaches were focused on traditional marketing principles, whereas, recent approaches are more comprehensive and are based on a growing consensus about what constitutes effective and equitable practice in social marketing. Existing social marketing planning approaches lack clarity regarding the implementation of recommended steps/processes or offers too many factors to be considered which makes the application of what is recommended difficult for those who aim to plan, design, manage or execute social marketing programmes. However, the development and adoption of existing social marketing planning approaches have demonstrated steady progress over recent years with a gradual increase in sophistication and comprehensiveness.

This review demonstrates that many existing social marketing planning approaches build on various disciplines starting from generic marketing concepts such as the marketing mix, segmentation, targeting, positioning, consumer research and environmental analysis, to inclusion of behavioural theories, consumer behavioural models, behavioural economics, psychology theories and other concepts such as stakeholders' engagement, sustainability in changed behaviour, citizen involvement, value co-creation and emphasis on research and

feedback at various stages of a social programme. This analysis demonstrates that earlier social marketing approaches were designed using commercial marketing principles that were mainly product driven. However, with robust theoretical development within social marketing over the last twenty years more recent social marketing planning approaches are beginning to reflect a more systematic understanding of social, behavioural influence and the need for more comprehensive planning approaches.

The social marketing planning approaches outlined in this review indicate that there is already a rich array of social marketing planning approaches that can be selected and adapted to reflect specific contexts and challenges. Rather than pursuing an attempt to isolate the perfect social marketing approach, social marketers may seek to ensure that they apply those approaches that reflect the evidence base of what works, how to best manage and evaluate programmes and what is contextually appropriate. This review also identifies a crucial gap in the literature: the need to develop more refined social marketing planning approaches which must move beyond operational planning models towards the development and application of whole systems modelling, planning and coordination. Therefore, including comparative field testing of the various approaches which already exist. There is also a need to investigate and develop solutions to the tensions that exist between community-driven models and organisational-driven models and the development of more realistic models underpinned by a deep understanding of consumer behaviour and the process of co-creation, ethical principles and sustainability in the changed behaviours. These models must emphasise on working with people to define problems, develop solutions, deliver them and evaluate success for sustainable outcomes.

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