

Social Marketing: A Systematic Review of Research 1998–2012

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Abstract

This article examines the development of social marketing research from 1998 to 2012. Drawing upon journal and database searches, 867 articles were retrieved and then analyzed in the light of the content analysis method. The article indicates that social marketing has captured increasing research attention, as evidenced by the growing number of articles published. U.S.- and U.K.-based researchers and institutions have contributed significantly to shaping knowledge in the field. Public health has predominantly been the research topic and hence more articles have been published in health-related journals than in marketing-related journals. Substantial research has focused on downstream social marketing, while the upstream and critical dimension has been given limited attention. Behavior change theories underlying social marketing studies were not always reported, leading to difficulties in identifying common factors in effective interventions. Social marketing research has been dominated by qualitative methods, although both quantitative and mixed methods are gaining prominence. Limitations to the article are discussed and gaps for further research indicated.

Keywords

marketing, behavior change, health promotion, systematic review, content analysis

Introduction

Conducting systematic analyses of the state of knowledge development is fundamental to evaluating the academic growth and maturity of any given discipline (Williams & Plouffe, 2007). Reviewing past research not only provides an overview of the progress achieved in a particular field of study but also identifies gaps and extends prior studies (Creswell, 2009). Furthermore, assessing previous research efforts reveals the theoretical awareness, methodological sophistication, and the direction of research in a field of study (Hesse-Biber, 2010; Krippendorff, 2004; Williams & Plouffe, 2007). Reviewing refereed journal articles is perhaps one of the most effective ways to position the academic landscape of a field of study (Wilkie & Moore, 2003). Although this process often involves the collection and analysis of a substantial amount of data and is thus time-consuming, it is important to benchmarking

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the progress of a discipline while also informing direction for future research with respect to topical, theoretical, and methodological trends (Williams & Plouffe, 2007). It is for these reasons that researchers have attempted to assess the state of marketing scholarship (Alvy & Calvert, 2008; Healey & Kassarian, 1983; Nasir, 2005; Sprott & Miyazaki, 2002; Wilkie & Moore, 2003; Williams & Plouffe, 2007; Yale & Gilly, 1988).

Marketing researchers have shown an interest in investigating the evolution of the marketing thought (Bartels, 1988; Duhaime, McTavish, & Ross, 1985; Ger, 1992; Kotler & Levy, 1969; Wilkie & Moore, 1999, 2003) and marketing research traditions, patterns, and paradigms (Zinkhan, 2006). Others have analyzed marketing research authorship (Eaton, Ward, Kumar, & Reingen, 1999), citation patterns (Baumgartner & Pieters, 2003; Peterson, 2005), and marketing journal rankings (Easton & Easton, 2003; Mort, McColl-Kennedy, Kiel, & Soutar, 2004; Moussa & Touzani, 2010). Attention has also been given to specific areas of research within the marketing literature. Yale and Gilly (1988) analyzed articles published in major advertising/marketing journals between 1976 and 1985 to understand trends in advertising research. Healey and Kassarian (1983) conducted a content analysis (CA) of advertisements from selected industries to examine changes in content. Gross and Sheth (1989) explored changes in U.S. magazine advertising over the period 1890–1988. Meanwhile, other researchers have considered specific aspects within the marketing and related literature. For instance, Nasir (2005) analyzed the content of articles published in business and marketing journals to trace the development, change, and transformation of management information systems. Williams and Plouffe (2007) adopted the CA method to understand the state of knowledge development in industrial selling and sales management using over 1,000 articles published in 15 key journals from 1983 to 2002. The present study draws upon a similar line of inquiry to investigate the state of research on social marketing.

Since the term *social marketing* was formalized (Kotler & Zaltman, 1971), it has attracted increased attention of scholars and practitioners in differing disciplines as evidenced by the growing number of academic and practical articles published globally (Truong & Hall, 2013). By using the tools of generic marketing to promote voluntary behavior change in target audience for collective welfare, social marketing has demonstrated its potential in a number of sectors. These include health (Bryant, Forthofer, Brown, Landis, & McDermott, 2000; Gordon, McDermott, Stead, & Angus, 2006; MacKintosh, MacFadyen, & Hastings, 1999), communication and transportation (Cooper, 2007; Fox & Kotler, 1980), environmental protection, sustainable development (Kennedy, 2010; McKenzie-Mohr, 1994; McKenzie-Mohr, Schultz, Lee, & Kotler, 2012; Tabanico & Schultz, 2007), and tourism and leisure (McKenzie-Mohr et al., 2012; Truong & Hall, 2013). Social marketing's successes can be found in many case studies and reports (Cork, 2008; Doner, 2003; Gordon et al., 2006; McKenzie-Mohr et al., 2012; Stead, Gordon, Angus, & McDermott, 2007).

Interests in social marketing have also resulted in some academic reviews. Fox and Kotler (1980) reviewed the first 10 years of social marketing, depicting the move of social marketing from a social advertising approach to social communications and promotion. While social advertising mainly articulates information to influence attitudes and behaviors, social communications and promotion utilize personal selling and editorial support. Social marketing replaces these approaches by adding at least four elements, namely marketing research, product development, incentives, and facilitation (Fox & Kotler, 1980). Bloom (1980) examined the ways social marketing programs were evaluated, indicating that many studies lacked proper design and implementation. Bloom and Novelli (1981) reviewed the first decade of social marketing development and called for more studies to lay a more rigorous theoretical foundation for the discipline. They suggested that issues such as audience segmentation, media channels, long-term positioning strategies, organization, and management should be examined. Lefebvre (1996) reviewed the 25-year development of social marketing and pointed out some issues that needed to be addressed, namely theoretical development, strategic and creative development of social marketing programs, adoption of social marketing in the private sector, children and adolescents

as target audiences, and new research agenda and techniques. Although these reviews are important, they are dated, especially given the growing number of social marketing publications as noted earlier.

More recent reviews have emerged in the extant social marketing and related literature, which, however, actually review social marketing applications in a specific sector, such as health (Aras, 2011) and transportation (Smith, 2006), or otherwise they are limited to a specific country (French, 2009). In other reviews, social marketing is not a focus, but rather part of several approaches aimed at behavior change (Willey, Paintain, Mangham, Car, & Schellenberg, 2012). Although these reviews offer social marketing scholars and practitioners with insightful understanding, none of them has systematically evaluated the state of social marketing research on a spatially broad scale and over an extended period. These reviews have also neglected to examine the authorship characteristics and theoretical and methodological bases of social marketing research. An updated, systematic assessment of the body of social marketing knowledge is thus needed.

Therefore, the present study attempts to fill this gap in knowledge by analyzing the content of social marketing articles published in refereed journals over a 15-year period, from 1998 to 2012 inclusive. It seeks to answer the following questions: How many social marketing articles have been published in this period? What is the authorship of social marketing research? What topics and perspectives have social marketing researchers embraced? What are the theoretical and methodological foundations of social marketing research? What is the potential for further development of social marketing research?

Methodology

Peer-reviewed journal articles were analyzed, given that they are essential communication channels for researchers as noted previously (Creswell, 2009; Wilkie & Moore, 2003; Williams & Plouffe, 2007). The author browsed every issue of marketing journals chosen on the basis of Moussa and Touzani's (2010) study that provided a comprehensive citation-based ranking of marketing journals. Health-related journals were also examined, given that a considerable number of social marketing studies have been conducted in the health sector (Dahl, 2010). Furthermore, important search engines and databases were used, including Google Search, Google Scholar, Scopus, JSTOR, Medline, Embase, PubMed, PsyInfo, EconLit, Social Policy and Practice, Cochrane Database of Systematic Reviews, Health Technology Assessment Database, Database of Abstracts of Reviews of Effects, and Business Source Complete Database (Dahl, 2010; Luca & Suggs, 2013; Takahashi, 2009).

First, the author investigated article titles. Many of these titles were very suggestive that they dealt specifically with social marketing. In cases they were not indicative of a social marketing focus, the author examined their abstracts, key words, and full length to ensure that relevant articles were not omitted. The six social marketing benchmark criteria suggested by Andreasen (2002) were also consulted to identify social marketing studies and interventions. These criteria included voluntary behavior change, audience research, audience segmentation, use of social marketing mix, exchanges, and competition (Andreasen, 2002; see also Stead et al., 2007; Truong & Hall, 2013). This practice was especially important, given that some prior research had suggested that a search simplistically based on the social marketing label might not be sufficient or even flawed (McDermott, Stead, & Hastings, 2005; Stead et al., 2007; Truong & Hall, 2013). The search process continued up to the end of August 2013, covering the period 1998–2012 as mentioned. Only full-length articles were considered. Editorials, research notes, and commentaries were excluded.

To examine the selected articles, the author utilized the CA method that is among the most important techniques in the social sciences (Krippendorff, 2004). CA is defined as “a research technique for making replicable and valid inferences from texts (or other meaningful matters) to the contexts of their use” (Krippendorff, 2004, p. 18). In the field of marketing, this method has become relatively popular as demonstrated by an increasing number of marketing researchers utilizing it (Alvy & Calvert, 2008; Nasir, 2005; Sprott & Mijazaki, 2002; Williams & Plouffe, 2007).

The author read each article, paying particular attention to its theoretical underpinnings, data gathering and processing methods, and discussions of research findings. Author contributions were measured by the number of instances, which is the number of times an author from a given region, country, or institution contributed to an article as a sole author or a coauthor. The identification of research perspectives involved the studied subjects, that is, who were studied. If an article sought to promote behavior change in individuals (e.g., community residents), then it adopted a downstream perspective. If it aimed to encourage behavior change in professional organizations, authorities, or policymakers, an upstream label was attached (Gordon, 2011; Hastings, MacFadyen, & Anderson, 2000; Kotler & Lee, 2008). Research topics concerned what was studied (e.g., smoking prevention and environmental protection). An article was considered “atheoretical” if it did not refer to an identifiable theoretical framework. It was regarded as “theoretical” if it explicitly utilized at least a theory (Williams & Plouffe, 2007). Theory is a “body of logically interconnected propositions which provides an interpretative basis for understanding phenomena” (Dann, Nash, & Pearce, 1988, p. 4). The theoretical awareness of a study can be assessed in terms of the criteria of understanding, prediction, and falsifiability. While the criteria of prediction and falsifiability may be subject to debate, they are important to the evaluation of progress in the realm of theory (Dann et al., 1988). An article was deemed “qualitative” if it used qualitative methods to collect, analyze, and present data (e.g., observation, interview, and NVivo) or it introduced new theoretical models/frameworks (Williams & Plouffe, 2007). In contrast, it was considered “quantitative” if it utilized quantitative methods (e.g., survey, experiment, and Statistical Package for the Social Sciences [SPSS]). A “mixed-method” label was attached if both qualitative and quantitative methods were combined. In addition, an article was considered a review if it dealt with untested hypotheses and/or propositions and reviewed the social marketing literature.

Results and Discussion

Results are presented in six main sections: number of social marketing articles published, authorship characteristics, research topics and perspectives, use of theories and models, research methods, and areas for further research. Although this study is limited to journal articles published over the period 1998–2012 inclusive, results are discussed, where relevant, in relation to articles that were published before 1998 and after 2012.

Number of Articles Published

Up to the end of August 2013, 1,423 articles were retrieved. After further examinations, 867 articles were chosen for analysis in this study. The remaining 556 articles were excluded because they were duplicate articles, their content did not meet Andreasen’s (2002) six social marketing criteria, or they primarily discussed other issues although they might have some implications for social marketing and included “social marketing” in their key words.

Figure 1 indicates the uneven annual growth of social marketing research. Yet, a growing trend was found when the period 1998–2012 was divided into three shorter periods, with each being 5 years long. Only 186 articles (21.5%) were published in the period 1998–2002. This increased to 247 articles (28.5%) from 2003 to 2007, and 434 articles (50%) between 2008 and 2012. In terms of content, these articles can be divided into five main categories. The first consists of application articles that describe/report a social marketing program/project or a stage of that program/project (347 articles). The second involves review articles that review social marketing research and/or practice in a field or country (37 articles). The third category concerns articles that draw on field research to test variables/hypotheses in the context of social marketing applications (161 articles). The fourth category comprises of articles that aim to advance social marketing knowledge (235 articles). The last category includes articles that

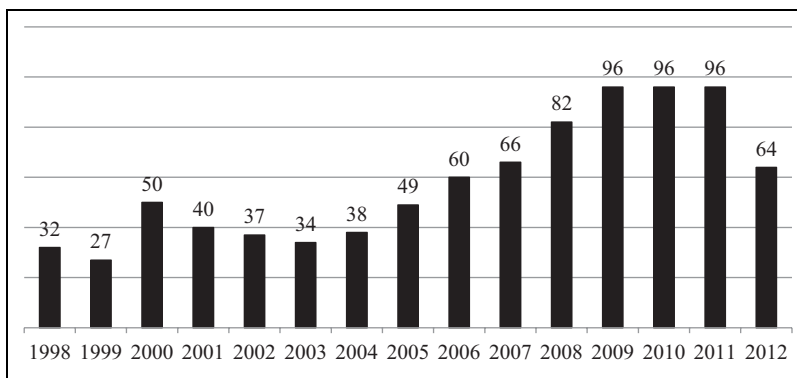


Figure 1. Growth of social marketing articles 1998–2012.

do not fall in any of the above categories (87 articles). This finding is consistent with Dahl's (2010) observation which suggests that a fair amount of social marketing research is practice oriented. Overall, the growing number of articles indicates that social marketing has captured increasing research attention and that the field has not reached a point of academic saturation yet. Therefore, it is possible that the social marketing literature will continue to expand in the years to come.

With respect to publication outlets, 308 articles (35.5%) were published in *Social Marketing Quarterly*. Other journals published much fewer social marketing articles. Of these, *Health Promotion Practice* published 42 articles (4.8%), *BMC Public Health* published 41 articles (4.7%), *Journal of Social Marketing* published 28 articles (3.2%), and *American Journal of Public Health* published 21 articles (2.4%) over the examined period. Although *Social Marketing Quarterly* was not established until 1994, it has positioned itself as one of the few journals that are explicitly devoted to social marketing research and practice. *Journal of Social Marketing* has also been dedicated to the social marketing field. However, it was not launched until 2011. Other marketing journals (e.g., *Journal of Marketing*), although emerged much earlier, have embraced various aspects of marketing, not just social marketing.

More articles were published in health-related journals (434 articles, equivalent to 50.1%) than in marketing-related journals (393 articles, equivalent to 45.3%). Journals in other fields published only 40 articles (4.6%) over the examined period. That health-related journals published more social marketing articles than other journals can be explained in several ways. First, the earliest social marketing interventions emerged in the public health field (Walsh, Rudd, Moeykens, & Moloney, 1993). Second, the first nationwide social marketing program started in India in 1967 to promote contraceptives. It was then expanded with increased funding from the U.S. Agency for International Development (USAID) in the 1970s to promote public health in Jamaica, Kenya, Columbia, and Sri Lanka (Fox & Kotler, 1980; MacFadyen, Stead, & Hastings, 1999; Walsh et al., 1993). Third, public health continues to be of interest to social marketing researchers and practitioners (Dahl, 2010; Helmig & Thaler, 2010). Fourth, health scholars and practitioners have paid increased attention to social marketing, the evidence being that social marketing was added in 2005 as a department in *Health Promotion Practice* (Thackeray & Brown, 2005).

Authorship Characteristics

Academic/Nonacademic authorship. Of the 867 articles examined, 161 (18.6%) were singly authored. The remaining 706 articles (81.4%) were coauthored, of which 520 articles (73.7%) were coauthored by 2 to 5 researchers and/or practitioners, 146 articles (20.7%) were coauthored by 6 to 9 researchers and/or practitioners, and 40 articles (5.6%) were coauthored by 10 to 16 researchers and/or

practitioners. These figures indicate that social marketing research has been strongly characterized by coauthorship, which can be ascribed to three main reasons. First, social marketing scholars have attached great importance to research collaboration and coauthorship. Interdisciplinary and international collaboration can improve research quality, as research knowledge and skills are shared. Second, as the social marketing field matures and the review process becomes more rigorous, cooperation and coauthorship tend to become the norm. Third, a number of articles describe/report specific social marketing projects, which often involve the participation of a certain number of (project) staff members or even a whole team (Long, Taubenheim, Wayman, Temple, & Ruoff, 2008).

Academics represented 60.4% (1,993 instances) and nonacademics accounted for 39.6% (1,307 instances) of authors. A researcher was deemed academic if he or she was affiliated with a higher education institution (e.g., university and college) and/or a research center as published in his or her articles. He or she was considered nonacademic if he or she was affiliated with a consulting company or a development agency, and so on. That academics far outweigh nonacademics is because research is fundamental to the career development of academics who are given awards and incentives to boost their research productivity while also contributing to improving their institutions' research profile. Academic authors may continue to dominate social marketing research in the future as long as publishing is vital to academic career success. However, contributions from nonacademics are also significant, suggesting that social marketing practitioners have actively participated in sharing their experiences in academic outlets. This finding is also supported by that obtained earlier, which indicates that a considerable number of articles are project descriptions or reports that involve social marketing practitioners. However, it is noted that some academics may have already participated in social marketing programs/projects and hence gained valuable experiences, but they were affiliated with academic institutions at the time of publication.

Geographic location of authors. With respect to the geographic location of social marketing researchers, the location of the authors' institutions was used, as it was extremely difficult to trace their nationality. In the case of multiple affiliations, the main affiliation, that is, the first named affiliation on a list of affiliations, was considered and hence secondary affiliations (e.g., visiting professor) were excluded. The use of the main affiliation was only for the purpose of the present study, not a denial of the importance of secondary affiliations. Table 1 shows that U.S. researchers appear to be the most prolific, accounting for over half (56.9%) of the total instances of authors, followed by those in the United Kingdom (11.5%), Australia (5.7%), and Canada (5.1%). There are some reasons for this. First, the social marketing concept was formalized by U.S. scholars (Kotler & Zaltman, 1971). Second, the first nationwide social marketing program was funded by USAID as noted previously. Third, these countries were among the earliest to establish social marketing centers (e.g., University of Strathclyde Centre for Social Marketing (United Kingdom), University of Stirling Institute for Social Marketing (United Kingdom); National Social Marketing Centre (United Kingdom). They have also acknowledged the importance of social marketing. Social marketing has been included in the United Kingdom's white paper *Choosing Health*. The Australian government has called for social marketing interventions in such areas as environmental protection and crime prevention (Dahl, 2010). Fourth, English is the main medium of communication in these countries, which is also the language of the journals considered in this study. Finally, *Social Marketing Quarterly*, which published a substantial number of social marketing articles over the examined period as discussed above, is based in the United States. Overall, the finding given in this section does not necessarily indicate the social marketing research productivity of a particular country. Rather, it primarily reflects the attention given by scholars in that country to social marketing research.

Institutional contributions to social marketing research. As educational institutions often specialize in certain disciplines and/or majors, they tend to become leaders in those fields. This section examines

Table 1. Research Contributions by Geographic Location.

Location	Instances	Percentage
North America		
United States	1,879	56.9
Canada	170	5.1
Europe		
United Kingdom	381	11.5
Switzerland	54	1.6
Germany	20	0.6
Belgium	22	0.7
France	16	0.5
Sweden	10	0.3
Other	35	1.1
Asia-Pacific		
Australia	189	5.7
India	38	1.2
China	32	1.0
New Zealand	26	0.8
Other	116	3.5
Africa		
Tanzania	79	2.4
South Africa	37	1.1
Other	128	3.9
Other	69	2.1

the contributions of authors from various educational institutions around the world to social marketing research. Table 2 shows institutions whose authors contributed more than 10 articles or parts of articles between 1998 and 2012. Institutions with multiple campuses are reported as one single institution.

Eighteen academic institutions contributed at least 10 articles or parts of articles between 1998 and 2012. Fourteen of these are U.S. institutions, three are British, and one is Canadian. This finding helps to explain as well as reinforce that obtained in the previous sections, that is, researchers in U.S. and U.K. institutions appear to have contributed significantly to shaping the body of social marketing knowledge as evidenced by a substantial number of social marketing articles published over the examined period. Some of these institutions are known to have a strong focus on marketing and are often among the academic institutions that have top marketing departments (e.g., University of California; Bak, Vitell, & Rose, 2000). Other institutions attach great importance to research in the fields of social marketing (e.g., University of Stirling and University of Strathclyde) and public health (e.g., Johns Hopkins University and University of South Florida; London School of Hygiene and Tropical Medicine).

Research Topics and Perspectives

The previous sections have indicated that the earliest social marketing interventions were made in the field of public health and that health-related journals published more social marketing articles than marketing-related journals. This is understandable, given that public health has been a predominant research topic in social marketing, which accounts for 71.4% of topical instances in the examined period (including *Public health* and *Global health epidemics* in Table 3). Other areas, such as environmental protection and tourism and leisure, appear to have captured limited attention of social marketing researchers and practitioners. While the effectiveness of social marketing may have been

Table 2. Research Contributions by Academic Institutions^a 1998–2012.

Institution ^b	Instances ^c	Author Instances ^d
University of California	44	105
University of South Florida	29	88
London School of Hygiene and Tropical Medicine	23	48
University of North Carolina	22	51
Brigham Young University	18	30
University of Stirling	16	43
University of Wisconsin	15	18
George Washington University	14	20
Johns Hopkins University	14	26
University of Toronto	14	24
University of Washington	14	34
University of South Carolina	13	39
University of Strathclyde	12	27
Tulane University	12	21
Colorado State University	12	32
University of Florida	11	20
Georgetown University	10	10
University of Pennsylvania	10	13

^aThose with at least 10 instances. ^bRanked by number of institutional instances. ^cCounts represent all campuses of an institution. ^dCounts represent number of times authors contributed to articles or parts of articles.

demonstrated in the public health field, it is not clear whether the same can be found in other fields, such as tourism and leisure, where most studies are conceptual in nature (Truong & Hall, 2013). Empirical evidence that proves the effectiveness of social marketing in these fields is lacking, raising the need for social marketing researchers and practitioners to broaden their interests to other fields than public health (Dahl, 2010; Helmig & Thaler, 2010; Takahashi, 2009).

Within the public health field, a considerable number of social marketing studies focused on behavior change in adolescents, the evidence being that they targeted at smoking, drinking, and substance prevention and cessation that often involved young adults (Diehr et al., 2011; Gordon, Moodie, Eadie, & Hastings, 2010; Hastings, Stead, & MacKintosh, 2002). Other studies that concerned reproductive health, domestic violence, sexual assault, obesity prevention, and physical activity embraced women and children as their target audience (Bate & Cannon, 2011; Bellows, Anderson, Gould, & Auld, 2008; Brionnes, Lustik, & LaLone, 2010). This suggests that Lefebvre's (1996) call for the targeting of children and adolescents, to a certain extent, has been responded to by social marketing researchers.

Research perspectives were explicitly stated in 684 of the 867 articles examined in this study. Of these, 521 articles (76.2%) dealt with the downstream level. That is, they primarily focused on the delivery of individual behavior change. Behavior change in other stakeholders relevant to individuals such as professional organizations and policymakers was the focus of 99 articles (14.5%). Both downstream and upstream social marketing were addressed in 64 articles (9.3%). These data reflect the fact that the majority of social marketing discourse has attached importance to the promotion of behavior change in individuals (Gordon, 2011). This may be attributed to Kotler and Zaltman's (1971) early definition of social marketing, which is arguably among the most cited social marketing definitions to date. Kotler and Zaltman (p. 5) defined social marketing as "the design, implementation and control of programs calculated to influence the acceptability of social ideas and involving considerations of product planning, pricing, communication, distribution and marketing research." Although this definition provided a useful framework for broadening the boundary of marketing, it did not

Table 3. Social Marketing Research by Topics.

Area	Type	Instances	Percentage
Public health	General public health	106	12.7
	Smoking prevention/cessation	55	6.6
	Alcohol prevention/cessation ^a	44	5.3
	Reproductive health ^b	36	4.3
	Chronic illness ^c	48	5.8
	Physical activity ^d	83	10.0
	Sanitation	15	1.8
	Immunization	3	0.4
	Oral rehydration	2	0.2
	Vaccination	13	1.6
	Family planning ^e	8	1.0
	Children health	20	2.4
	Men's health	4	0.5
	Nutrition	26	3.1
Global health epidemics	Use of condoms	27	3.2
	HIV/AIDS	67	8.0
	Malaria	38	4.6
Public safety	Transportation and traffic	6	0.7
	Occupational safety	9	1.1
	Other	4	0.5
Environmental protection	Waste reduction/recycling	31	3.7
	Water protection		
	Emission reduction		
	Energy use reduction		
Tourism and leisure		8	1.0
Civil Society	Gambling	4	0.5
	Domestic violence ^f	14	1.7
Organ/blood donation		4	0.5
Poverty alleviation		5	0.6
Community outreach		19	2.3
Social marketing theory ^g		86	10.3
Other		48	5.8
Total		833	100

^aInclude substance prevention/cessation/recovery. ^bInclude women's health. ^cInclude cancer, diabetes, heart diseases, tuberculosis. ^dInclude obesity prevention. ^eInclude use of contraceptives. ^fInclude sex abuse. ^gInclude, among others, discourse over elements of the social marketing mix.

explicitly indicate the potential of social marketing in motivating behavior change in the upstream level (Gordon, 2011). This perhaps helps to explain why the number of downstream social marketing articles far outweighs that of upstream social marketing articles as indicated above.

A single emphasis on individual behavior change, while necessary, may limit social marketing effectiveness given that in many cases decisions and choices are not solely determined by individual preferences, but rather by the social environments and contexts in which individuals are a part (Donovan & Henley, 2010; Kotler & Lee, 2009; Stead et al., 2007). It is, therefore, necessary that social marketing research place an equal emphasis on behavior change in organizations, decision and policymakers, as well as other stakeholders that influence individuals' choices of behavior, if social marketing is to realize its full potential (Donovan & Henley, 2010; Farrell & Gordon, 2012; Gordon, 2011; Kotler & Lee, 2008; Stead et al., 2007). In addition, only a small number of articles examined the critical dimension of social marketing, that is, the analysis of the social effects of commercial

Table 4. Theories and Models Most Widely Used in Social Marketing.

Theories/models	Instances
Social cognitive theory	23
Theory of reasoned action/planned behavior	22
Health belief model	21
Stages of change model/transtheoretical model	20
Social/behavioral—ecological model	16
Diffusion of innovation theory	14

marketing policies and practices (Farrell & Gordon, 2012; Gordon, 2011; Gordon et al., 2010). It is thus appropriate to claim that the extant social marketing literature, although expanding as analyzed previously, is limited not only in terms of topic (public health) but also perspective (downstream social marketing).

Use of Theories and Models

Social marketing is not a theory in itself. Instead, it draws upon different theories and models to identify determinants of behavior change and thereby develop appropriate intervention strategies (Donovan & Henley, 2010; Luca & Suggs, 2013). However, prior research has suggested that a large number of social marketing studies are not theoretically informed and, even if they are, they do not report theory and model use in detail (Lefebvre, 2000; Luca & Suggs, 2013; Thackeray & Neiger, 2000; Truong & Hall, 2013). This finding is confirmed by the present study. Of the 867 articles examined, only 160 articles (18.5%) explicitly stated the use of theory; 654 articles (75.4%) were not theoretically informed. The remaining 53 articles (6.1%) included review articles and those that did not provide any theory-related information. This means that some social marketing campaigns may not report theories and models that guide their design, implementation, and evaluation (Luca & Suggs, 2013). However, it is found that theories and models are increasingly used in social marketing studies over the examined period. From 1998 to 2002, only 32 articles (20%) were theoretically informed. This increases to 39 articles (24.4%) between 2003 and 2007 and 89 articles (55.6%) in the period 2008–2012. Table 4 shows theories/models that were used more than 10 times in the examined articles. The finding is consistent with Lefebvre's (2000) observation that suggests that social cognitive theory, health belief model, theory of reasoned action/planned behavior, and diffusion of innovation theory are among the most frequently used in social marketing studies (see also Thackeray & Neiger, 2000).

A number of other theories and models were also used in social marketing studies but are not included in Table 4 due to their low frequency. These theories and models include, among others, social learning theory, protection motivation model, hierarchy of effects model, and community organization/readiness model. Theories and models used in social marketing have their roots in a wide range of disciplines, such as health (e.g., health belief model; Kassegne, Kays, & Nzohabonayo, 2011), sociology (e.g., social capital theory; Glenane-Antoniadis, Whitwell, Bell, & Menguc, 2003), political science (e.g., political economic model; Frame & Newtown, 2007), psychology (e.g., attribution theory; Shang, Basil, & Wymer, 2010), and economics (e.g., supply chain theory; Al-Oun, 2012). The evidence suggests the interdisciplinary nature of social marketing with respect to theory and model use.

While some studies were underpinned by one single theory or model (e.g., Al-Oun, 2012; McCausland et al., 2009), others referred to multiple theories and/or models (e.g., Kolodinsky & Reynolds, 2009; Long et al., 2008; Park et al., 2011). However, the purpose of using theories and/or models was not always clearly reported. In some cases, theories were used for audience research and segmentation (e.g., Dharod, Drewette-Card, & Crawford, 2011), intervention development (e.g., Draper et al., 2010;

Table 5. Use of Research Methods Over Time.^a

	Qualitative (N = 441)		Quantitative (N = 279)		Mixed (N = 110)		Total ^b (N = 830)
	Freq.	%	Freq.	%	Freq.	%	
1998–2002	116	63.0	48	26.1	20	10.9	184
2003–2007	128	54.7	78	33.3	28	12.0	234
2008–2012	197	47.8	153	37.1	62	15.0	412

^aCounts by number of articles. ^bExclude 37 review articles.

Richert, Webb, Morse, O'Toole, & Brownson, 2007), message formation (e.g., Gallivan, Lising, Ammary, & Greenberg, 2007; Johnson, Bellows, Beckstrom, & Anderson, 2007; Young, Anderson, Beckstrom, Bellows, & Johnson, 2004), promotion (e.g., Wackett, 1998), and evaluation (e.g., Gruchy & Coppel, 2008). In other cases, how theories were used to inform studies/interventions were not reported. For example, in the *Heart Truth* project, Long, Taubenheim, Wayman, Temple, and Ruoff (2008) listed some theories but did not explain at which stage of the project the theories were used. In short, the findings given in this section suggest four main characteristics of social marketing studies with respect to theory and model use. First, a majority of social marketing studies are not theoretically informed. Second, theories are not clearly reported, although they may be used to inform social marketing studies. Third, social marketing studies tend to borrow theories and models from a wide range of disciplines. Fourth, the purpose of using theories and models is not always stated in detail.

Methods for Social Marketing Research

Of the 867 articles considered, 37 (4.3%) are review articles, 441 (50.8%) are qualitative, 279 (32.2%) are quantitative, and the remaining 110 articles (12.7%) use both qualitative and quantitative methods. These figures help to explain the fact that a considerable number of social marketing studies are qualitative and that the effectiveness of social marketing interventions tends to be qualitatively reported (Geller, 2002). Descriptive statistics is the most popular analytical techniques used in quantitative articles (179 instances), followed by such quantitative analytical softwares as SPSS, SAS, and STATA (134 instances), logistic regression analysis (102 instances), and χ^2 test (84 instances). Other less popular quantitative analytical techniques include analysis of variance, analysis of covariance, multivariate analysis of variance, rank analysis of covariance (49 instances), *t*-test (39 instances), and factor analysis (23 instances). Some articles combined a number of quantitative analytical techniques, while others made use of a single technique. Although social marketing research appears to be dominated by qualitative methods, both quantitative and mixed methods are gaining prominence as shown in Table 5.

In the period 1998–2002, over half of the published articles (63%) were qualitative in nature. This number decreased to 54.7% from 2003 to 2007 and 47.8% between 2008 and 2012. Meanwhile, quantitative articles increased from 26.1% (1998–2002) to 33.3% (2002–2007) and 37.1% (2008–2012). A growing trend was also seen in mixed-methods articles, from 10.9% (1998–2002) to 12% (2003–2007) and 15% (2008–2012). These figures suggest that social marketing research has evolved from conceptual discourse toward a greater emphasis on quantifiable data. They also suggest that the challenge of demonstrating the effectiveness of social marketing interventions has been responded to by researchers and practitioners. However, qualitative articles remain significant, suggesting that the theoretical underpinnings of social marketing continue to capture substantial research attention. This reinforces the above argument that social marketing has not reached a point of academic saturation. Therefore, the social marketing literature may further expand in the years to come, with greater prominence of quantitative and mixed methods.

Areas for Future Research

Several areas have emerged from this article that may hold substantial potential for further research. First, a large number of social marketing studies are qualitative in nature. Quantitative and mixed methods are much less popular. It is, therefore, necessary that more attention be paid to the use of quantitative and mixed methods in social marketing studies. This would help social marketers better demonstrate the effectiveness of social marketing interventions, which is arguably the most crucial aspect of social marketing as it provides important managerial implications (Helmig & Thaler, 2010). Instead of measuring perceptual and attitudinal changes in target audience (Geller, 2002), efforts should be made to measure changes in their behaviors (Helmig & Thaler, 2010). This is important, given that behavior change is considered the bottom line of social marketing programs/projects. Some scholars have even argued that without any impact on behavior change after interventions, programs are not successful (Redmond & Griffith, 2006; Tabanico & Schultz, 2007).

Second, a large number of studies attempted to measure changes in the same target audience by using the pre- and post-intervention model of effect (Doner, 2003; Geller, 2002), where self-completion questionnaires were widely used (e.g., Thrasher et al., 2011; Withall, Jago, & Fox, 2012). Others sought to compare behavior change between the target audience and a nontarget group (e.g., Wright, McGorry, Harris, Jorm, & Pennell, 2006; Wu et al., 2007; Yancey et al., 2003). Outcomes that were based on direct observations were scarce, raising concerns over the validity of the reported behavior changes given that what was reported and what actually happened might be substantially different. Doubts may also be cast regarding the long-term effects of social marketing interventions. This is because a majority of programs/projects tended to be evaluated as soon as they finished, although they might be designed to contribute to long-term socioeconomic changes. In addition, only one study (Futterman et al., 2001) reported the employment of independent evaluators to evaluate the effectiveness of social marketing interventions. Further research exploring a solid framework for assessing social marketing effectiveness and identifying the roles of independent evaluators in that process is thus needed.

Third, a substantial number of studies stated the success of social marketing in differing sectors and contexts. However, far fewer studies reported failed social marketing efforts (Hastings et al., 2002; Rothman, Decker, & Silverman, 2006), the side effects of social marketing interventions on the target audience, as well as the equity of access to social marketing products within the target audience and between the target and the nontarget audience (Knerr, 2011). It is possibly because positive articles tend to be accepted for publication more easily than critical articles that report negative findings. As a result, critical articles may be published in other forms than journal articles. However, both the failures and the side effects of social marketing initiatives are needed to provide valuable lessons for future efforts. Further research into this issue is thus warranted.

Fourth, since social marketing itself is not a theory, it incorporates a number of theories and models to promote behavior change as previously mentioned. Prior research has suggested that effective campaigns tend to use theory in their design, implementation, and evaluation (Thackeray & Neiger, 2000). While some articles identified in this study were based on more than one theory, others did not explicitly report theory and model use. The purpose of using theories and models was not always stated. Although some social marketing projects might have used theories and models to guide their interventions, they did not note those theories and models in detail (Luca & Suggs, 2013; Stead et al., 2007; Truong & Hall, 2013). If social marketing is concerned with changing behaviors, then it is often assumed that this is undertaken upon a clear understanding of what actually causes people to change their behavior. While there is a reasonable partial understanding from a research standpoint, some campaigns and interventions are undertaken by governments, agencies, and organizations on the basis of lay knowledge and assumptions. If interventions are based on assumptions or personal beliefs with respect to behavior change, then it is difficult to identify common factors in effective interventions and

hence difficult to inform future interventions. Future research thus can explore how and to what extent theories and models are used to inform social marketing programs/projects. Reviews can focus on specific sectors (e.g., health; Luca & Suggs, 2013) to examine which theories and models are effective in identifying if personal attitudes or social contexts are the main determinants of behavioral choices, and which theories and models are effective in informing message design or program evaluation.

That a large majority of social marketing studies identified in this article were not theoretically informed may also raise questions as to if the presence of an underlying theory necessarily results in effective interventions, if effective interventions necessarily constitute proof of a theory's value, and if the effectiveness of a theory can be tested easily. While some studies (e.g., Johnson et al., 2007) attributed the outcomes of social marketing interventions to the use of the social learning theory in developing new learning skills in the target audience, others (e.g., Gruchy & Coppel, 2008) did not report any significant behavior change although they used theories in their design and evaluation. Further research is thus needed to investigate why theories and/or models may work in some cases but not in others. Further research also needs to explore why social marketing researchers/practitioners often neglect to report theories and models in their studies/projects and how to encourage them to clearly report those theories and models (Luca & Suggs, 2013).

Fifth, further research is also possible to examine the potential of upstream social marketing in promoting changes in interest groups, the media, stakeholders, organizations, and policy makers. These people and organizations to some extent influence the social context in which individual behavior choices are made (Gordon, 2011; Hastings et al., 2000; Kotler & Lee, 2008). Targeting the upstream level helps social marketers avoid being criticized for blaming their own target audience whose behaviors are not always under their control. It also makes downstream efforts less manipulative and overcome structural barriers to change (Hastings et al., 2000). In fact, the move beyond individual behavior change had already emerged in the 1960s. Kotler and Levy (1969) claimed that an organization's consumers include not only individuals but also the general public, and the latter is the target audience of social marketers. Kotler and Roberto (1989) emphasized the effect of different "influentials" on the success of social marketing programs, arguing that successful social marketing requires an insightful understanding of the behaviors of the upstream audience. These people were classified into four groups: permission granting group, support group, opposition group, and evaluation group (Kotler & Roberto, 1989). Since then, a clear indication of upstream social marketing and its differences from other regular lobbying activities has not been examined (Dann, 2010), which offers gaps for further research.

Sixth, upstream social marketing can be combined with critical social marketing to promote organizational and structural changes (Farrell & Gordon, 2012; Gordon, 2011). This article has indicated that the critical dimension of social marketing has thus far been touched upon by a limited number of scholars, although the first definition of critical social marketing emerged long ago. Critical social marketing "is concerned with the application of marketing knowledge, concepts, and techniques to enhance social as well as economic ends. It is also concerned with analysis of the social consequence of marketing policies, decisions and activities" (Lazer & Kelly, 1973, p. ix). A critical approach to social marketing may hold substantial potential for improving marketing theory and practice, informing downstream and upstream social marketing, and adding to the wider evidence base of social marketing itself (Gordon, 2011). In addition, by contributing to mitigating the negative effects of commercial marketing on society (Farrell & Gordon, 2012; Gordon et al., 2010), critical social marketing can benefit individuals, organizations, and society overall, which is consistent with the core principle of collective welfare of social marketing.

Seventh, it now appears appropriate that social marketing needs to expand beyond the field of public health to embrace a wider range of areas and sectors. Social marketing can be further applied to the field of environmental protection and natural resource conservation. Previous research has suggested that human behaviors are the main cause of environmental problems and that

technological advances, while helping to protect the environment by using resources more efficiently, cannot settle all environmental problems (Oskamp, 2000; Takahashi, 2009). Rather, radical shifts in individual and public attitudes and behaviors are urgently needed (Takahashi, 2009). To this end, social marketing may provide important potential and the areas that it can contribute include, among others, consumption reduction, emission reduction, waste reduction and recycling, and sustainable living.

Social marketing can also expand to the field of poverty alleviation. It appears that poor people are often ignored by social marketers since they have very little to exchange and this situation runs counter to the notion of exchange in social marketing (Alwitt, 1995). However, social marketing may still be able to contribute to improving the well-being of poor people. If poverty is ascribed to ineffective policies and structural arrangements (Freeman, 1998), then upstream social marketing interventions may be important. In cases poverty is due to the attitudes and behaviors of poor people (Amsden, 2012; Moore, 2012), downstream social marketing may be significant in promoting positive behavior change in the poor (Kotler & Lee, 2009). Critical social marketing can also make effective contributions to improving the living conditions of poor people. For example, vulnerable groups such as the poor and young people in the United Kingdom are often the target audience of tobacco marketers who create value brands or use material holding appeal to youths in their marketing communications (Gordon, 2011). A critical social marketing approach can thus be adopted to encourage tobacco producers and marketers to undertake more socially responsible marketing practices that better care about the health of poor people and vulnerable groups as well as the general public overall (Farrell & Gordon, 2012; Gordon, 2011).

In addition, social marketing may hold important potential for the tourism field. Tourism is the temporary movement of people outside of their home environment. It often involves a wide range of short-term travel behaviors, including business, visiting friends and relatives, religion, health, and education. While tourism is often recognized as one of the biggest and fastest growing sectors worldwide, it is also known to have a range of impacts that may potentially be mitigated by social marketing. Tourism is a significant contributor to environmental change, contributes to changes in land cover and land use, energy use, biotic exchange and extinction of species, exchange and dispersion of diseases, and the production of pollution and carbon emission (Hall, 2011). Yet, the roles of social marketing in promoting behavior change in different tourism stakeholders remain underresearched, although its potential has been acknowledged by the United Nations World Tourism Organization (2011). Most social marketing-related studies in the tourism literature are conceptual in nature (Beeton & Pinge, 2003; Bright, 2000; Kaczynski, 2008) and hence empirical studies are lacking. Truong and Hall's (2013) study is arguably the first empirical tourism paper in the social marketing literature, which suggests that social marketing may help the tourism sector to contribute more effectively to poverty alleviation and natural resource conservation. However, as the authors noted, further research is needed to confirm this finding while also contributing to the evidence base of social marketing. Upstream and critical social marketing may also have substantial implications for tourism. Sirakaya and Sonmez (2000) suggested that women in tourism advertisements are often depicted in a stereotypical fashion as being submissive, subordinate, and dependent on men and noted the potential for social marketing approaches to change the practices of tourism marketing organizations toward promoting gender equity (see also Chhabra, Andereck, Yamanoi, & Plunkett, 2011).

For social marketing to expand successfully to other fields, as Andreasen (1997) argued, the use of theories and models in the social marketing planning process is necessary. This argument again reinforces the earlier suggestion with respect to the clear reporting of theory and model use in social marketing studies/interventions and the identification of cases where theories and models work as well as those where they fail. In short, all the noted areas provide meaningful themes for social marketing research in the future.

Conclusion

This article has attempted to evaluate the state of social marketing research from 1998 to 2012. Using journal and database searches, 867 peer-reviewed articles were retrieved and then analyzed in the light of the CA method. The article has shown that social marketing has captured increasing research attention as demonstrated by the growing number of published articles. U.S.- and U.K.-based researchers and institutions appear to have made significant contributions to shaping the body of social marketing knowledge. Social marketing research has been characterized by strong collaboration and coauthorship. Public health has been a predominant research topic and thus more articles have been published in health-related journals than in marketing-related journals. The majority of social marketing discourse has focused on the delivery of individual behavior change while paying little attention to the upstream and critical dimension. Theories and models underlying social marketing studies are not always clearly stated or adequately reported. Although quantitative and mixed methods are increasing, qualitative methods remain significant in social marketing research. The article has also indicated gaps for further research, including the need to move beyond the public health field, provide quantifiable data on the effectiveness of social marketing interventions, and report theory and model use. This article has suggested that efforts have been made in response to the call of (early) social marketing researchers (e.g., Bloom & Novelli, 1981; Lefebvre, 1996) regarding the creation of a more rigorous theoretical foundation for social marketing and the focus on children and adolescents. However, much still needs to be done, especially with respect to the reporting of theories and models that underpin social marketing studies/interventions.

Although this article may make some potential contributions to social marketing research and practice, its limitations should be acknowledged and readers are advised to take these limitations into consideration while evaluating the research design and findings. First, this article was only limited to refereed journal articles. Books, reports, and working papers were not considered. Therefore, similar reviews may be conducted on these documents. Reviews can also be undertaken to examine how the influence of peers (e.g., friends and relatives) on individual behavior change has been addressed in social marketing studies, which Andreasen (2005) referred to as midstream social marketing (in addition to downstream and upstream social marketing as analyzed in this article). Second, this article may have omitted several important articles due to restricted subscriptions. Third, the inclusion or exclusion of articles that have some implications for social marketing in a discussion that is otherwise primarily focused on other fields helps to explain why reviewing the social marketing literature may become a challenge and thus a debate over its actual size. This challenge is even compounded by the lack of a widely accepted definition of social marketing (McDermott et al., 2005; Stead et al., 2007), the limited attention paid to the labeling and evaluation of social marketing interventions (Andreasen, 2002) and hence the absence of an agreed set of key criteria for identifying genuine social marketing interventions (Andreasen, 2002; Truong & Hall, 2013). Nevertheless, the findings of this article contribute to shaping debate about future research in the field and potentially engaging scholars and practitioners in the widening of the research agenda, particularly beyond the area of public health and into other areas that social marketing may hold important practical implications. The findings of this article may also be of interest to graduate students and researchers identifying potential countries and institutions where to study, teach, or research social marketing.

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