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## The Development of Social Marketing: A Historiography Based on Bartels' Framework (1951-2009)

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*In 1962, Robert Bartels proposed a periodization framework for classifying the development of marketing thought between 1900 and 1960. This paper shows that a similar framework can be used to trace the progress of social marketing, a sub-discipline of marketing, from its roots in the 1950s to the present time. Using Bartels' titles for periods—discovery, conceptualization, integration, development, reappraisal, and reconception—the paper outlines the strides that social marketing took and the major contributions of various scholars in each period, then proposes areas for future research.*

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Social marketing thought, like that of any field of academic inquiry, has continued to evolve from its inception in the late 1960s and early 1970s, when Kotler and Levy (1969) proposed the broadening of marketing beyond business firms, to the present. The progress of the field has been recounted and evaluated at various points in time (e.g., Fox and Kotler 1980, Malafarina and Loken 1993, Andreasen 2003). This paper revisits the field's progress, this time taking a historiographic approach towards the study of the development of social marketing as a distinct area of marketing, using the same period titles introduced by Bartels (1962) in his periodization of the history of marketing thought at large.

Hollander and colleagues (2005, 32) define periodization as "the process of dividing the chronological narrative into separately labeled sequential time periods with fairly distinct beginning and ending points." Marketing historians have widely discussed the merits and limitations of periodization (e.g., Hollander et al. 2005, Stowe 1983). The chief shortcoming of the reduction of history to distinct periods is the tendency to oversimplify, emphasizing the distinguishing features of each period at the expense of other features and events (Heaton 1955, Hollander et al. 2005), and thus failing to recognize basic foundations that span across periods (Stowe 1983). In addition, it is often difficult to reach consensus on how to delineate periodic boundaries, as the same historical chronology can be divided based on an abundance of varying criteria (Hollander et al. 2005, Stowe 1983). Finally, Hollander et al. (2005) warn that periodization tends to exaggerate progress, chronicling an apparent evolution towards an ever more desirable state.

Nonetheless, periodization has many advantages that historians can exploit, while recognizing and accounting for the trade-offs. The exercise is useful in that it imparts order upon an otherwise seemingly chaotic overabundance of events (Stowe 1983), thus providing structure to history, allowing for comparisons among periods, and facilitating the analysis and assimilation of historical information (Hollander et al. 2005).

It is from this perspective that I attempt to periodize the history of social marketing. Such a periodization is valuable in that it provides an integrative perspective on the field's history and offers a common knowledge base to which academicians and practitioners can refer. Ironically, while Bartels (1974) disapproved of the inclusion of social marketing within the scope of marketing, the sequence of periods he identified in the development of marketing thought is useful for organizing the history of *social* marketing in a corresponding manner. However, while this paper borrows Bartels' period titles and their sequence, it departs in one significant way from his periodization scheme. Bartels uses simple calendar dates as the basis for his periodization technique, designating each decade (e.g., 1900-1910, 1910-1920, etc.) as a period, then proceeding to determine the distinguishing features of that period and hence giving it a label. While Bartels' approach has its merits—not the least of which is its simplicity—it has been criticized for its arbitrary use of decade boundaries to demarcate periods (Stowe 1983). This paper uses the method of periodization described by Stowe (1983) and recommended by Hollander et al. (2005, 37), namely "periodization by turning points"—which relies on momentous changes or turns of events to mark the beginning of each new period. Hollander et al. (2005) also distinguish between the history of marketing thought and that of marketing itself, or of marketing practice. The focus of this paper is on social marketing thought. While I will necessarily refer to social marketing practice, the turning points that guide this periodization are ones related to social marketing literature and academic thought.

**TABLE 1**  
**MARKETING HISTORY PERIODS ACCORDING TO BARTELS AND**  
**CORRESPONDING SOCIAL MARKETING HISTORY PERIODS**

Marketing Period	Accomplishments in the Field	Social Marketing Period	Accomplishments in the Field
1900-1910: Period of Discovery	<ul style="list-style-type: none"> <li>• Initial teachers of and courses in marketing emerged.</li> <li>• Marketing scholars borrowed theory from economics.</li> <li>• “Marketing” as a discipline conceived and given a name.</li> </ul>	1951-1971: Period of Discovery	<ul style="list-style-type: none"> <li>• Marketing terminology used in the literature in reference to non-commercial applications.</li> <li>• Kotler and Levy introduced the broadened concept of marketing.</li> </ul>
1910-1920: Period of Conceptualization	<ul style="list-style-type: none"> <li>• Marketing concepts developed and classified.</li> <li>• New terminology created.</li> <li>• Marketing functions identified.</li> </ul>	1971-1979: Period of Conceptualization	<ul style="list-style-type: none"> <li>• Social marketing defined and its legitimacy as “marketing” questioned.</li> <li>• Commercial marketing terminology such as “exchange” adapted to apply to social marketing.</li> </ul>
1920-1930: Period of Integration	<ul style="list-style-type: none"> <li>• Principles of marketing proposed.</li> <li>• Body of marketing thought integrated.</li> <li>• Specialized areas of marketing emerged.</li> </ul>	1979-1994: Period of Integration and Development	<ul style="list-style-type: none"> <li>• Questions regarding the applicability of commercial marketing concepts, such as the four Ps, posed and addressed.</li> <li>• Social marketing’s body of knowledge continued to grow, and several textbooks and scores of articles on the topic published.</li> </ul>
1930-1940: Period of Development	<ul style="list-style-type: none"> <li>• Specialized areas of marketing continued to emerge.</li> <li>• Hypotheses verified/quantified.</li> <li>• New approaches to marketing undertaken.</li> </ul>		
1940-1950: Period of Reappraisal	<ul style="list-style-type: none"> <li>• New needs for marketing knowledge emerged.</li> <li>• Concept of marketing was reappraised.</li> <li>• Traditional explanations of marketing were reappraised.</li> </ul>	1994-2003: Period of Reappraisal	<ul style="list-style-type: none"> <li>• New, more precise, definition of social marketing proposed by Andreasen.</li> <li>• New definition espoused in the literature that followed.</li> </ul>
1950-1960: Period of Reconception	<ul style="list-style-type: none"> <li>• Managerial decision-making, societal aspects, and quantitative analysis received greater emphasis.</li> <li>• Theory received greater emphasis.</li> <li>• Many new concepts introduced into marketing.</li> </ul>	2003-2009: Period of Reconception	<ul style="list-style-type: none"> <li>• More critical stance regarding the applicability of commercial marketing concepts to social marketing undertaken.</li> </ul>

Bartels' classification of the history of marketing into decades (Bartels 1962, Stock 2008) and the corresponding classification of the history of social marketing over the past half-century, are illustrated in Table 1.

For centuries, the concepts that would later be taught by social marketing academics were utilized by practitioners in areas as diverse as politics and public health. The Period of Discovery of social marketing occurred between 1951 and 1971, when marketing terminology entered the non-commercial arena, and Kotler and Levy's (1969) controversial article, "Broadening the Marketing Concept," was published. Following this breakthrough, the Period of Conceptualization (1971-1979) began. In it, key definitions—including that of social marketing itself—were constructed, amidst an ongoing debate surrounding the question of whether marketing should indeed be broadened to include non-business applications. With key concepts in place to serve as a foundation for future work, and the debate largely completed, scholars in the Period of Integration and Development (1979-1994) addressed questions regarding the applicability of commercial marketing concepts, such as the four P's, to social marketing. The body of knowledge in the field grew significantly, and was integrated in several textbooks. Social marketing was truly reappraised in the period that followed (1994-2003), when a new definition was proposed and espoused in the literature; the decade can aptly be named the "Period of Reappraisal." Finally, over the past five years, scholars appear to have changed their general outlook of integrating social marketing with commercial marketing, and began to pose the question of whether the area would benefit from more independence. Thus, while the specific issues addressed in each of these periods may differ from those addressed in the progression of the parent discipline of marketing during its own development, the themes remain parallel.

## THE DEFINITION OF SOCIAL MARKETING

While, necessarily, one of the aims of this paper is to chart the evolution that has occurred in the definition of social marketing, it is important to start by identifying, a single definition that scholars have predominantly come to agree upon. Relying on a single definition of social marketing that we can refer back to will help us gain perspective on the significance of various developments in the field; it will give us a solidly-grounded vantage point by which to evaluate these developments. The definition that I will use here is the one introduced by Andreasen in 1994 (110):

*Social marketing is the application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programs designed to influence the voluntary behavior of target audiences in order to improve their personal*

*welfare and that of the society of which they are a part.*

This definition will be revisited and elaborated in a latter section of the paper, but the pivotal concept here is that of *behavior influence*—as distinguished from mere education or dissemination of ideas—as the ultimate goal of social marketing.

## PRE-1951: EARLY BEGINNINGS

Bartels began his analysis of the history of marketing by identifying the most recent predecessors to the field. I shall do the same. Just as concepts from the discipline that we now identify as marketing were taught and practiced under different names—such as "product distribution" and "applied economics"—prior to the coining of the term "marketing" early in the twentieth century (Bartels 1962, 32), social marketing existed long before the term was conceived. Andreasen's definition helps us identify the seeds of social marketing. Some have claimed that the Ancient Greek and Roman campaigns to free slaves, the British campaign to eliminate child labor during the industrial revolution, and the US campaigns for abolition and prohibition are all examples of social marketing (Lyle 2003), while others have suggested that every political campaign constitutes a social marketing effort (Kotler and Levy 1969).

Perhaps the first campaigns that closely resemble what we now term "social marketing," however, were undertaken in the early nineteen-hundreds. Three illustrative examples follow.

First, In the 1910s and 1920s, the United Kingdom's National Council for Combating Venereal Diseases sponsored a sexual health campaign, using posters, pamphlets, and lectures to promote sound sexual practices and hygiene, thus preventing the spread of venereal diseases (Thomson 2007). "Moral hygiene...through education" was the behavioral product being promoted, and single women of the working class population constituted the target market (Thomson 2007, 2). Thus the goal of the campaign went beyond changing an idea to include influencing behavior—a concept that would not explicitly enter the definition of social marketing until 1994.

The second example occurred in the 1920s and 1930s, when the new government of the Soviet Union used posters to educate citizens on and promote behavior change related to various public health issues, including infectious diseases, infant mortality, and tobacco and alcohol consumption (Fox 2007). As Fox (2007, 97) points out, the posters not only communicated government officials' views of these health problems, but also included "what solutions they proposed, and what they wanted the public to do." Furthermore, the government was able to assure that these health messages monopolized the media, and that their

effect was thus not dampened by counterpropaganda (Fox 2007). Once again, these are notions that would appear in the social marketing literature decades later.

As a third example, Holden and Holden (1991) argue that a British woman, Ruth Drummond, employed the planning variables of marketing in her regular *Ladies Home Journal* column to promote Britain's social cause amidst attacks from Nazi Germany in 1939-1941, in order to elicit sympathy and perhaps household supplies from American readers of the magazine. The product was the unflinching view of Nazi Germany's actions against women and children as criminal, the promotional technique was personal selling through skillful communication, and the price was sympathy and supply packages (Holden and Holden 1991, 154). While each of these three examples, and others, appear to meet the criteria of a true social marketing campaign—with a specific target market, utilization of the four marketing planning variables, and a goal of influencing behavior none of them received this label at the time of their inception.

During this early period, several scholars from outside the field of marketing began to investigate the effectiveness of conscious campaigns aimed at promoting an idea or changing public opinion, though behavior change was not yet emphasized. In their 1948 (27) paper, Lazarsfeld and Merton posed the question:

*What are the conditions for the effective use of mass media for what might be called 'propaganda for social objectives'—the promotion, let us say, of non-discriminatory race relations, or of educational reforms, or of positive attitudes towards organized labor?*

They went on to outline the three conditions of which one or more must be satisfied for such "propaganda" to be effective. These conditions are monopolization of the mass media, or "the absence of counterpropaganda," the canalization of existing behaviors and attitudes—or the channeling of these behaviors into a desired direction, rather than the creation of completely new ones incompatible with the old—, and supplementation of the mass media by personal, face-to-face contact to reinforce the message (Lazarsfeld and Merton 1948, 27-29).

### 1951-1971: PERIOD OF DISCOVERY

The publication of sociologist G.D. Wiebe's 1951 work marked the beginning of the Period of Discovery, in which non-marketers integrated more explicitly the four planning variables of marketing into their discussion of non-business marketing applications, while marketing academics as well began to espouse this application. Wiebe (1951, 679) posed a compelling and eloquent question: "Why can't you sell brotherhood and rational thinking like you sell soap?" Like Lazarsfeld and Merton, he proposed

a set of factors that allegedly moderate the effectiveness of advertising—specifically television advertising—on attitude and behavior relating to a social cause. These factors are the *force* of the audience's motivation to act based on both its predisposition and the advertising message, the *direction* or clarity of the message's instructions regarding how to behave, the existence of a social *mechanism* to serve as a medium for action, the *adequacy and compatibility* of that social mechanism with regard to the desired behavior, and the *distance* between the audience and the behavior—or the energy required to act in relation to the expected rewards (Wiebe 1951, 681-682). Wiebe's analysis laid the groundwork for what was to follow in the establishment of social marketing as a rightful area of marketing. Wiebe began his article by asking whether commercial marketing techniques could be used to market social products, a question that marketing scholars reiterated and attempted to answer for decades afterwards. While Wiebe may not have used marketing terminology, he clearly integrated the concepts of product, price, and promotion, and went beyond attitude change to focus instead on behavior influence.

The remainder of this period witnessed the introduction of marketing terminology to non-business applications—specifically what we now term "social marketing." Like the early years of social marketing that Bartels had described, the first years of social marketing involved the borrowing of ideas—this time from commercial marketing—and the conception of a new discipline. Towards the end of this period came Kotler and Levy's (1969) widely-cited article "Broadening the Concept of Marketing," in which they argued that *all* organizations, business firms or not, engage in marketing and would benefit from the knowledge and application of marketing techniques.

Exemplifying the thought that was occurring prior to the publication of Kotler and Levy's paper, is the less well-known article by Simon (1968), "Some 'Marketing Correct' Recommendations for Family Planning Campaigns." In it, Simon offered examples of how various principles of advertising could successfully be applied to family planning campaigns. He outlined, for instance, the importance of testing various advertising messages and comparing their effectiveness, and of assessing the "dollar-value" for each member of the audience in order to conduct a cost-benefits analysis of the campaign. Simon referred to the members of the population targeted by the campaigns as "customers" and urged the responsible agencies to think of them as such. He ended his article by summarizing that "social psychologists and sociologists who have done yeoman work in the family planning movement would benefit from an examination of the principles of advertising and marketing..." (Simon 1968, 507). This article may well represent the introduction of marketing terminology into the non-business arena, this time by one of marketing's own academics.

Kotler and Levy's (1969) article, which followed shortly thereafter, was broader and more inclusive in that it referred to the utility of marketing for all organizations—not just public health agencies—and addressed the various marketing functions and tools—not just advertising. Kotler and Levy (1969, 11) argued that “every organization performs marketing-like activities whether or not they are recognized as such,” citing police departments, museums, school systems, and anti-smoking groups as examples. They broadened marketing by asserting that a product can take on many forms, including that of an idea, a person, or an entire organization, and that “consumers” can be specific clients or the general public at large. They also asserted that just like its business counterpart, the non-business organization should identify its target market and seek to exploit its own differential advantage in reaching that target group. Thus Kotler and Levy argued that what defines an endeavor as “marketing” are its tools and techniques, and not the particular product with which it is concerned. While the two scholars did not use the term “social marketing,” their seminal article is often considered to mark the “birth” of the field (e.g., Andreassen 2003).

The impetus for this broadened concept of marketing is likely to have been the growing significance of the marketing management school of thought in marketing, which replaced the functions, commodities, and institutional schools as the dominant school of thought in the 1960's (Shaw and Jones 2005). As marketing scholars (e.g., McCarthy 1960, Borden 1964) introduced and emphasized the notion of the marketing mix, and designated the determination of the components of this mix as the crucial role of the marketing manager, it became quite logical to conceive of the application of marketing in the non-business arena (Shaw and Jones 2005). Marketing management techniques would now have new applications, though, as I shall later detail, such broadening would involve a redefinition of marketing and many of its key concepts.

Kotler and Levy's article immediately provoked a debate among members of the marketing academia. Perhaps the most instantaneous rebuttal came from Luck's 1969 article “Broadening the Concept of Marketing – Too Far.” Luck (1969, 54), using a sarcastic tone that began in the title of his work, contended that Kotler and Levy's proposition would make marketing an all-encompassing field that included almost every activity, causing the field to “lose its identity.” While Kotler and Levy had argued that marketing involved *any* transaction, Luck (1969, 54) asserted that marketing should be confined to “*market transactions* ... characterized by buying and selling” and pointed out that the discipline was already of “enormous scope” and required no further broadening. The endless array of questions that remained to be answered, he argued, would only be hindered by Kotler and Levy's proposition.

## 1971-1979: PERIOD OF CONCEPTUALIZATION

While this debate ensued, social marketing as a field continued to develop. In Bartels' “Period of Conceptualization,” new marketing concepts and terms were developed and defined. For social marketing, likewise, the period beginning in 1971 involved new definitions, the adaptation of several marketing definitions to apply to social marketing, and increasing conceptualization of social marketing as a whole. Perhaps most importantly, the term “social marketing” was defined for the first time, marking the beginning of a new period of development. In 1971, Kotler and Zaltman (5) proposed the following definition:

*Social marketing is 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.*

Thus the focus, once again, was on influencing ideas, not behavior. Kotler and Zaltman went on, within the same work, to explain how McCarthy's four P's of marketing could be adapted and applied to social marketing, citing examples of good and poor applications. A social marketing product, for instance, often included a “core product”—such as safe driving—and a set of “buyable” products—such as safe-driving courses, educational material on safe driving, and insurance policies offering premiums discounts for safe drivers—which served to advance that social cause (Kotler and Zaltman 1971, 7). In this way, social marketing became less abstract, and its literature began to include more concrete and actionable concepts.

Another significant concept that emerged to serve as a supportive basis for social marketing was that of the expanded exchange paradigm proposed by Bagozzi in 1975. Marketing scholars viewed exchange as a strict *quid pro quo* concept, where one tangible thing of value was given in return for another, and only two parties were involved. Bagozzi saw this concept as restrictive and incomplete. It only described one type of exchange: “restricted exchange” (Bagozzi 1975, 32). Exchange, he asserted, could also be “generalized,” wherein three parties benefit each other both directly and indirectly in a single sequence of exchanges, or “complex,” wherein at least three parties are interconnected in a network of direct and indirect exchanges (Bagozzi 1975, 33-35). Furthermore, exchange could be utilitarian, involving only tangible goods or money; symbolic, involving intangible entities such as psychological or social values; or mixed, involving both (Bagozzi 1975, 36-37). Bagozzi argued that social marketing did indeed involve exchange, but not of the

restricted form. Instead, social marketing was concerned with generalized and complex exchanges, and ones that involved both tangible and intangible entities (Bagozzi 1975, 38). This innovative conception strengthened the link between marketing in the business arena and social marketing.

Meanwhile, the debate over the legitimacy of social marketing as an area of marketing remained unresolved. Bartels (1974, 74-75) poignantly summarized the debate as follows:

*The crux of the issue is this: is the identity of marketing determined by the subject matter dealt with or by the technology with which the subject is handled? Specifically, is marketing the application of certain functions, activities, or techniques to the dissemination of economic goods and services, including the satisfactions they provide? Or is it the application of those functions and techniques to the dissemination of any ideas, programs—noneconomic as well as economic, nonbusiness as well as business?*

Bartels took a more impartial stance compared with Luck, but—while he appreciated the advantages of broadening marketing—like Luck, he feared that the broadened concept would distract from other pressing business questions, shift the focus from substance to methodology, and alienate business practitioners.

Other examples of the controversy were the articles by each of Enis (1973) and Hunt (1976). Enis (1973) argued that the broadened concept of marketing required “deepening” before it could be useful. He had no objection to expanding the boundaries of marketing, but believed that the critical task was one of developing marketing theories, operationalizing them, and testing them in real situations. Only then could marketing, in its broadened sense, make progress. Hunt (1976) introduced a scheme of three dichotomies—profit/nonprofit, micro/macro, and positive/normative—by which marketing thought could be classified. As an example, Hunt (1976) classified social marketing as nonprofit/micro/normative. He stated that it would be more useful for scholars to define particular issues or research problems based on these dichotomies, than to dispute the scope of marketing as whole.

Around the same time, a survey of marketing professors by William Nickels (1974) seemed to close the debate. Nickels reported that 95% of the professors surveyed believed that marketing should be broadened beyond business firms, and 93% agreed with Kotler that marketing was not related only to economic goods and services. By the end of the decade, the literature predominantly concurred. Laczniak and Michie (1979, 214), for example, stated that “broadened marketing is almost a *fait accompli*.” Social marketing had become a respected area of marketing in its own right.

## 1979-1994: PERIOD OF INTEGRATION AND DEVELOPMENT

During the next period, the body of social marketing knowledge developed at an unprecedented rate. Likewise, the application of this knowledge expanded into various areas. The first textbooks in the field were also published, integrating the body of knowledge for the first time. This growth was fueled in large part by the articles published respectively by Rothschild in 1979 and Bloom and Novelli in 1981, recounting the problematic differences between commercial and social marketing, and posing the research questions that needed to be addressed in order to make commercial marketing techniques more effective in social marketing programs. Together, the two articles raised several compelling issues in the following areas:

- **Product:** Concrete product concepts are more difficult to formulate in nonbusiness situations (Bloom and Novelli, 1981, 82), and social products offer benefits that are often intangible and not immediate, and thus more difficult for the customer to perceive than those of economic goods (Rothschild, 1979, 12).
- **Price:** Prices in social marketing include non-monetary costs such as time, inconvenience, and psychological costs, which are difficult to quantify and vary widely among customers (Bloom and Novelli 1981, 83-84; Rothschild 1979, 12-13).
- **Channels:** Social marketers face more challenges in their relationships with intermediaries, because they have less control over them (Bloom and Novelli 1981, 84), because these relationships are often not governed by contracts and often do not involve direct monetary compensation.
- **Communications:** The lack of funds, the sensitivity of many of the issues addressed, and the complex nature of the product limit the nature of the promotional methods available for social marketers (Bloom and Novelli 1981, 84-85).
- **Segmentation:** Market segmentation in social marketing is complicated when a high level of participation is required by all members of the society in order for the campaign to be successful (Rothschild 1979, 15), or when the target segment—as is often the case—is the most disinclined towards the social product in question (Bloom and Novelli 1981, 81-82).

These issues and others provided ammunition for researchers in social marketing. The field’s scope and definition had been clarified further by Fox and Kotler (1980), when they distinguished between social marketing (marketing of a social cause), societal marketing (marketing in a socially responsible way), and nonprofit organization marketing. Now there was also a series of pressing

questions to be resolved. Indeed, a 1993 literature review by Malafarina and Loken identified at least seventy-six empirical social marketing articles published in five marketing journals between 1980 and 1991. The articles covered a wide array of topics and applications, including energy conservation and the environment, nutrition, substance abuse, and others.

Also fuelling the growth of social marketing during this period as well as the preceding one, was its successful field application. While debates and discussions continued among academics, various organizations were eager to begin applying the new—albeit at times vaguely-defined—concepts of social marketing. Perhaps most notably, the US Agency for International Development (USAID) and other organizations employed what was termed “contraceptive social marketing” in family planning programs (Harvey 1999, Ling et al. 1992). Such efforts enriched the development of social marketing, as an abundance of data became available for academics to analyze and integrate into theory (e.g., Rothschild 1977). Thus, following a transition when social marketing theory and practice seemed to develop along separate paths (Ling et al. 1992), direct collaboration ensued between social marketing academics and practitioners. Bill Novelli, co-founder of the consulting firm Porter Novelli—a renowned consulting firm specializing in social marketing—for example, began to author publications (e.g., Bloom and Novelli 1981, Novelli 1990). Alan Andreasen began to take part as a consultant in various social marketing programs (e.g., Andreasen 1980, 1987, and 1993). Such cross-fertilization was instrumental for the progress of social marketing.

During this period, the first social marketing textbooks were also published, demonstrating the growing body of knowledge in the field and conscious attempts to integrate that knowledge. Examples include Fine’s (1981) *The Marketing of Ideas and Social Issues*, Manoff’s (1985) *Social Marketing: New Imperative for Public Health*, and Kotler and Roberto’s (1989) *Social Marketing: Strategies for Changing Public Behavior*.

### 1994-2003: PERIOD OF REAPPRAISAL

Social marketing thought continued to follow a pattern of development parallel to that of marketing thought, as outlined by Bartels. The Period of Reappraisal witnessed a significant shift as the concept of social marketing was reassessed based on the scholarly work of the preceding period, and on the better-defined needs of social marketers. Andreasen’s introduction of a new, refined definition of social marketing, quoted at the beginning of this paper, marked the start of this period. As Table 2 demonstrates, throughout the two decades preceding this point in time, several definitions for social marketing had emerged—much like the definition of “marketing” has evolved over

the past century. Andreasen’s new definition was the most detailed, addressing the nuances of the meaning of social marketing and shifting the emphasis from *ideas* to *behavior*, and appears to be the widely-accepted definition even today.

Andreasen (1994, 110) emphasized the significance of behavior influence as the “bottom line” of social marketing, stating that a mere change of attitudes or ideas was inadequate. How, he asked, can a social marketer ensure that a change in attitude will reflect on future behavior? Without a definitive answer to this question, social marketing resources would go to waste. Andreasen also explicated his choice of terminology in detail. For example, he explained that behavior *influence* did not necessarily mean behavior *change*. Drug use prevention campaigns, for example, aim to discourage change. Similarly, Andreasen emphasized that social marketing’s focus was on influencing *voluntary* behavior, and not on coercion. Finally, he highlighted the implications of the word “programs” in the definition, stating that social marketing applied to ongoing, long-term programs. It applied, he asserted, neither to individual campaigns (that would be advertising, not marketing), nor to specific organizations (Andreasen 1994, 110-111).

This new, detailed, definition resolved many of the issues that had been faced by social marketing researchers, and thrust the field forward by providing unambiguous direction. It solved many of the measurement problems cited by previous researchers such as Rothschild, and Bloom and Novelli, as the goals of a social marketing program were now more concrete and measurable. As Andreasen later noted, his new definition also brought down many of the barriers between commercial and social marketing; the “ultimate measure of success” for both had now become behavior influence (Andreasen 2003, 297). By the end of this period, the reappraisal and redefinition of social marketing had solidified in the literature. Exemplifying the clear definition which had become associated with the term “social marketing,” is Rothschild’s 1999 article, in which he outlined the separate but complementary roles of education, marketing, and law in managing public health behaviors. Rothschild (1999, 25) provided a clear distinction between education, which involves messages for informational and persuasion purposes; law, which involves coercion to influence behavior; and marketing, “which refers to attempts to manage behavior by offering reinforcing incentives and/or consequences in an environment that invites voluntary exchange.”

**TABLE 2**  
**DEFINITIONS OF SOCIAL MARKETING OVER TIME**

Source	Definition
Kotler and Zaltman 1971, 5	"Social marketing is 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."
Kotler and Roberto 1979, 6	"An organized effort conducted by one group (the change agent), which intends to persuade others (the target adopters) to accept, modify, or abandon certain ideas, attitudes, practices, and behavior."
Andreasen 1994, 110	"Social marketing is the application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programs designed to influence the voluntary behavior of target audiences in order to improve their personal welfare and that of the society of which they are a part."

Thus, social marketing was reappraised and became grounded in its new definition. Progress also occurred in the establishment of the various institutions related to the field. For example, three social marketing conferences—the Social Marketing in Public Health Conference, the World Social Marketing Conference, and the Innovations in Social Marketing Conference—began to take place, and the journal *Social Marketing Quarterly* was established in 1994 (Andreasen 2003, 297).

### **2003 ONWARDS: PERIOD OF RECONCEPTION**

In the latest period of its history, social marketing has continued to grow, in both the theoretical and practical arenas. Andreasen (2002 and 2003) cites the ongoing publication of social marketing textbooks and social marketing chapters in general marketing textbooks, the establishment of social marketing centers in various countries, and the establishment and prospering of the Social Marketing Institute as indications of the growth in theory and concepts. He cites the successful use of social marketing approaches by agencies such as the US Department of Agriculture, the Center for Disease Control and Prevention, and the World Bank, as well as the establishment of several social marketing consulting firms, as signs of the growth of social marketing practice (Andreasen 2002 and 2003). More recently, the establishment of the UK's National Social Marketing Centre in 2006 both contributes to and evidences the continuing development of social marketing.

The onset of this period was marked by the birth of several ideas that are novel, and even border on the radical,

to the field of social marketing, making this period truly one of reconception. First, is the suggestion by some scholars that social marketing distance itself from commercial marketing techniques, thus reversing the trend that the field has striven for since its inception. Most notably, Peattie and Peattie (2003, 367) argue that "we need a more thoughtful and selective application that emphasizes the differences between commercial and social marketing." They state that social marketing would benefit from its own theoretical base, which would be derived from, but not identical to, that of marketing. They purport that a separate terminology would serve to more effectively advance the field. For example, in social marketing the term "social proposition" would replace "product," and "interaction," "exchange" (Peattie and Peattie 2003, 382). Such changes, they argue, would be similar to the "reframing" of services marketing and relationship marketing as sub-disciplines of marketing, but ones with their own tools and terminologies (Peattie and Peattie 2003, 383). Andreasen (2003, 299) has more subtly argued a similar viewpoint:

*The assumption that commercial sector concepts and tools ought to migrate seamlessly to social marketing is, in point of fact, just an assumption. Scholars and researchers need to explore more carefully and extensively the conditions under which transfer is both possible and potentially easy.*

Thus social marketing academics, having gained an acceptance by "mainstream" marketers, have begun to question whether such a close association is indeed beneficial.



A second, closely-related concept is that of how commercial marketing can benefit *from* social marketing. Andreasen has suggested that, because social marketing is concerned with behavior influence, its body of knowledge can be reapplied by business organizations in various ways. A business firm may have an interest in influencing the behavior of its own employees, franchisees, and channel partners, for example (Andreasen 2003, 299).

Third, branding has been introduced as a potentially useful concept in social marketing. Wood (2008) has cited instances where a social marketing campaign became a pervasive brand, such as Truth, an anti-smoking campaign in Florida, and Think!, a road safety campaign in the UK. Wood argues that just as commercial marketers use branding to build lasting relationships with customers, social marketers, too, may be able to use it as a promotional tool, especially among young audiences. However, the use of brands in social marketing continues to raise ethical questions among those who highlight the perceived manipulative nature of marketing (Wood 2008, 82-83).

## THE FUTURE OF SOCIAL MARKETING

Scholars have pointed to several factors that must be satisfied if social marketing is to continue to grow and prosper. These factors include social marketing's perceived strength relative to other social change techniques, its academic prestige, and the proper documentation of its past successes (Andreasen 2002, 4). The American Marketing Association's (2007) most recent definition of marketing as "the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large" is a step towards a broader acceptance of social marketing as an integral part of marketing than it has already achieved. The definition does away with the aspect of exchange and refers to "offerings" rather than "products," thus eliminating two of the concepts that were historically problematic in the conceptualization of social marketing.

In subsequent editions of *The Development of Marketing Thought*—which he renamed *The History of Marketing Thought*—Bartels (1976 and 1988) identified two additional periods of marketing history. During the Period of Differentiation (1960-1970), several specialty areas of marketing—such as marketing management, the systems approach, and international marketing—took on distinct identities. An intriguing question for future research is whether social marketing shows signs of similar differentiation—across schools of thought or areas of application—that would be expected to occur throughout

the next decade. The final period identified by Bartels is, interestingly, the Period of Socialization (1970-1980), when social issues enjoyed greater significance in marketing thought. Indeed, it is during that period that social marketing was conceptualized.

Future progress in the field would appear to benefit most from research efforts that address the following issues:

1. Social marketing research that has been undertaken thus far seems to be more applied in nature than research in other areas of marketing. This is signified, for example, by the way that Malafarina and Loken chose to classify the articles in their 1993 literature review: by issue investigated (e.g. environment, nutrition, etc.) rather than by construct studied or some other conceptual means of classification. While practical application is important, academics in the field should turn their attention to the building of theory and models that are generalizable in nature, using specific application areas only as a context for studies. They should strive, for example, to build consumer behavior models and explicate the relative effectiveness of various promotional techniques in ways that are applicable across a variety of practical social marketing questions—whether they relate to energy conservation or blood donation.
2. Along the same motif, social marketing application seems to have been historically dominated by public health campaigns. This may be due to historical reasons, for advertising and educational campaigns relating to public health issues emerged even before social marketing as a field of study was conceived. It may also be due to the heavy reliance of scholars on data and studies relating to public health programs. This raises the question: has social marketing failed to adequately permeate areas other than public health because research has focused on public health programs, or does research focus on public health programs because there is insufficient evidence in other areas (after all, public health is an area where funding has been available relative to other fields)? Regardless of the answer, scholars should make a conscious effort to use other areas as contexts for future studies.
3. While social marketing academics have repeatedly outlined the applicability of the four P's to the field, advertising—whether television, print, or direct mail—remains the dominant component in social marketing programs. Scholars should endeavor to investigate how the other marketing planning variables can be more widely applied in social marketing. In what ways, for example, can existing models related to *product packaging* be applied to

social marketing? How can social marketers better motivate and utilize *intermediaries*?

4. Finally, the most fundamental question that social marketing scholars must answer is this: Is social marketing's endeavor to remain an integral part of the higher-order field of marketing an advantage or a hindrance? The questions that Rothschild (1979) and Bloom and Novelli (1981) posed regarding the utility of commercial marketing concepts to social marketing—though they provoked numerous studies in the 1980s and beyond—merit further research, as evidenced by the comparable questions raised by Peattie and Peattie in 2003. Would social marketing benefit from more independence, and a renewed reliance on non-marketing fields such as sociology? How can such independence be reconciled with a continued association with marketing?

The progression and growth of social marketing over the past half-century points to its bright prospects; the field is not a passing fad. Its scholars must, however, strive to answer the questions that will continue to propel it towards future development.

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