

A history of historical research in marketing

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Introduction

The purpose of this chapter is to review historical research in marketing. Because of space limitations, this review is more a chronicle of what has been published about historical research in marketing than a critical historical analysis, hopefully providing the reader with a roadmap to further reading on historical topics of interest. Scholars in a wide range of disciplines have published historical research about marketing and have done so in various publications, many outside what would be considered the ‘marketing literature’. Except for some overall frequencies of publication reported in this introduction, this review has focused mostly on historical research published in marketing periodicals and in books.

The discipline of marketing emerged early in the twentieth century as a branch of applied economics strongly influenced by the German Historical School and its offspring, the American Institutional School (Jones and Monieson, 1990). Thus, from its beginnings the academic study of marketing was influenced by an historical perspective. However, for economists studying marketing at the turn of the twentieth century, history was a means to an end rather than an end in itself. Marketing economists during that era studied the histories of marketing practices carried out in industries and by firms in order to discover marketing functions and principles.

The earliest university courses in marketing in North America were taught in 1902/03 when the Universities of Illinois, Michigan and California offered the

first courses in what was then called distribution (Bartels, 1962). The term 'marketing' was used by economists in a manner consistent with current practice as early as 1897 (Bussiere, 2000) and gradually replaced 'distribution'. A handful of general marketing texts was published by 1920 (Converse, 1933) and the first scholarly journals on the subject appeared in the mid-1930s, merging to form the *Journal of Marketing* in 1936 (Witkowski, 2007). Their sponsoring associations, the American Marketing Society and the National Association of Marketing Teachers, also merged to form the American Marketing Association on 1 January 1937. As the marketing discipline crystallized in the 1930s, scholars began to reflect on their heritage and published what today is considered some of the earliest historical research in marketing.

With some exceptions, historical research about marketing and marketing-related subjects is conducted by two relatively distinct groups of scholars – marketing professors working in business schools, and business history professors who, for the most part, work in history departments. Again, with some exceptions, these two groups tend to present their work at different academic conferences and publish in different journals. Throughout this chapter we'll focus mostly, but not exclusively, on the work of marketing historians publishing in marketing periodicals as well as books.

Marketing historians usually recognize two overlapping, but relatively distinct, general fields within historical research in marketing – 'marketing history', and the 'history of marketing thought'. Marketing history includes, but is not limited to, the histories of advertising, retailing, channels of distribution, product design and branding, pricing strategies, and consumption behaviour – all studied from the perspective of companies, industries, or even whole economies. The history of marketing thought examines marketing ideas, concepts, theories, and schools of marketing thought including the lives and times of marketing thinkers. This incorporates biographical studies as well as histories of institutions and associations involved in the development of the marketing discipline. These two fields or categories of historical research provide one of the two main organizing themes for this chapter. The other theme, of course, is chronological. The history of historical research in marketing is divided here into three eras: (1) 1930–1959; (2) 1960–1979; and (3) 1980–present. Periodization in this case is driven by turning-points in the material being reviewed (Hollander et al., 2005), developments that occurred during the early 1960s and early 1980s.

As detailed below, marketing history as History began to be published during the early 1930s. The 1960s saw a decline of interest in historical research by marketing scholars, probably driven by an increasing pragmatism in business education during that time. Nevertheless, the scope and rigour of individual works published after 1960 was improved considerably over earlier research. During the early 1980s, a number of specialized conferences, collections of readings, and special issues of periodicals fuelled a dramatic growth of interest in historical research in marketing. This growth of interest is illustrated in Table 3.1 which shows the cumulative number of publications on historical research in marketing by decade since 1930, as listed in the Google Scholar database. That database includes peer-reviewed papers, theses, books, abstracts and articles from academic publishers, professional societies, reprint repositories, universities and other scholarly

Table 3.1 Cumulative volume of publications in historical research in marketing, 1930–2009

Search Phrase	Up to:	1930	1940	1950	1960	1970	1980	1990	2000	2009
Retailing history		0	0	2	5	7	17	38	77	147
Advertising history		3	5	8	12	21	67	151	315	553
Marketing history		1	5	6	8	19	33	117	342	837
History of marketing thought		0	0	0	0	1	4	17	49	141
Total		4	10	16	25	48	121	323	783	1,678

Note: All data are end-of-decade count

Source: Google Scholar, accessed 9 June 2009.

organizations. Using the search phrases ‘marketing history’, ‘retailing history’ (with ‘marketing history’ excluded to avoid double counting), ‘advertising history’ (again, ‘marketing history’ excluded), and ‘history of marketing thought’, yielded a cumulative 1,678 publications in historical research in marketing from 1930 through May 2009. These searches probably understate the amount of publishing activity in historical research in marketing since some authors undoubtedly do not use those phrases in their published work. For example, during the 1930s and 1940s there were a number of studies published in the *Journal of Marketing* about the origins of the marketing discipline that do not show up in these searches of the Google Scholar database.

Of course, not all of the publications counted in Table 3.1 were reviewed for this chapter. The relatively smaller number of publications through the 1970s was manageable. However, as Table 3.1 indicates, since 1980 and especially during the past decade there has been dramatic growth of publication activity in this field. For that more recent period this review is more selective, focusing on major publications in the marketing periodical literature as well as the most relevant books.

Recording the facts: 1930–1959

The first scholarly marketing journals, *The Journal of Retailing*, *The American Marketing Journal* and *The National Marketing Review*, began publication in 1925, 1934, and 1935 respectively, with the last two merging in 1936 to form the *Journal of Marketing*. The sponsoring organizations for the two parent journals, the American Marketing Society and National Association of Marketing Teachers, also merged in 1937 to form the American Marketing Association (AMA). These developments provided an important impetus for historical work as they naturally led to reflection about the origins and development of the marketing discipline. At the same time, the *Journal of Marketing* provided a specialized outlet for the publication of such historical reflection. Thus, beginning in the early 1930s there were a number of attempts to put things on the record.

History of marketing thought

From the early 1930s to late 1950s historical research in marketing was dominated by the study of marketing thought. During this period, attention was focused on tracing the earliest literature (Applebaum, 1947, 1952; Bartels, 1951; Converse, 1933, 1945; Coolsen, 1947; Maynard, 1951) and marketing courses taught in American universities (Bartels, 1951; Hagerty, 1936; Hardy, 1954; Litman, 1950; Maynard, 1941; Weld, 1941). The earliest historical study included in this review was Converse's (1933) 'The first decade of marketing literature', published in the *NATMA Bulletin*. Converse's article was typical in its attempt to identify historically significant events. In his opinion the first modern books on marketing were Nystrom's (1915) *The Economics of Retailing* and A.W. Shaw's (1915) *Some Problems in Market Distribution*.

Other early historical studies focused on the individuals and organizations that pioneered the development of the discipline (Agnew, 1941; Bartels, 1951; Converse, 1959b). A series of 23 biographical sketches published in the *Journal of Marketing* between 1956 and 1962 was later reprinted as a collection edited by Wright and Dimsdale (1974) and subsequently reprinted along with other, more recent biographies of other pioneer marketing scholars in Tadjewski and Jones (2008). Bartels' (1951) article titled 'Influences on the development of marketing thought, 1900–1923' was seminal in its attempt to go beyond a simple chronicle of 'firsts'. It drew upon numerous interviews of pioneer scholars in order to examine some of the sources of early marketing ideas. Bartels' article was also the most ambitious historical analysis at that time as it was based on his (1941) doctoral dissertation at Ohio State University, the first such work known.

During the 1950s a trend began towards focusing on the history of marketing concepts (Breen, 1959; Kelley, 1956), theories (McGarry, 1953), and schools of thought (Brown, 1951). Cassels (1936) had earlier examined the influence of significant schools of economic thought on marketing, but it wasn't until the 1950s that marketing *ideas* or *concepts* were developed enough to warrant a retrospective. An important collection of such articles was published in 1951 under the title *Changing Perspectives in Marketing*. It claimed to be 'one of the few, if not the only one, in which a series of papers has been compiled to give historical treatment and perspective to the development of marketing [thought]' (Wales, 1951: v). This included topics such as retailing, sales management, marketing research and marketing theory. Its contributors were eminent scholars in marketing. Most had been recipients of the American Marketing Association's prestigious Paul D. Converse Award.

Marketing history

There was less research done during this early period on marketing history, most of which focused on the history of retailing and wholesaling (Barger, 1955; Emmet and Jeuck, 1950; Jones, 1936; Kirkwood, 1960; Marburg, 1951; Nystrom, 1951; Phillips, 1935). Barger's (1955) book titled, *Distribution's Place in the American Economy Since 1869*, examined the changing role of wholesale and retail sectors in the

American economy from 1869 to 1950. It was a unique study of the cost and output of distribution, and of the relative importance of wholesale and retail sectors as measured by the proportion of the labour force engaged in each. Early books on retailing history included Hower's (1946) history of the R.H. Macy department store; the well-known classic history of mail-order house Sears, Roebuck and Company by Emmet and Jeuck (1950); and histories of the F.W. Woolworth chain store by Phillips (1935) and Kirkwood (1960).

A more general history of marketing, distinctive both for its scope of subject matter and for its breadth of historical perspective, was Hotchkiss' (1938) *Milestones of Marketing*. Using the American Marketing Association's definition of marketing to guide his choice of topics, Hotchkiss traced what he believed to be the most important steps in the evolution of marketing back to ancient Rome and Greece through medieval England to modern North American practices, focusing on retailing, advertising and merchandising.

Another marketing history which complemented the Hotchkiss book in time period by focusing on marketing practices of the early twentieth century was Converse's (1959a) *Fifty Years of Marketing in Retrospect*. This was written as a companion to his (1959b) study of the beginnings of marketing thought cited earlier. Converse described his marketing history book as 'the story of business and particularly of market distribution as I have seen it and as I have studied it' (1959a: vi). In addition to marketing practices such as advertising and promotion, pricing and merchandising, Converse described the changing economic conditions and technological developments during the early twentieth century that influenced such practices.

Throughout this early period, historical research was relatively descriptive as marketers focused on recording the facts of marketing history and the history of marketing thought. The most prolific and perhaps most important contributor during this era was Paul D. Converse whose two monographs published in 1959 are typical of historical research in marketing to that point in time.

Foundations of the new marketing history: 1960–1979

The 1960s was a transition period with fewer, but more ambitious studies of marketing history and the history of marketing thought. A number of significant works and events laid the foundation for the growth of interest in historical research evident today. For example, during the early 1960s successive conferences of the American Marketing Association featured tracks on historical research (Greyser, 1963; Smith, 1964). Most of the papers presented at those sessions called for more historical research and offered justifications for doing such work and, in that way, helped to legitimate subsequent historical research. Although there was a notable decline in the number of publications in the periodical literature (Grether, 1976), several important books were published. Four books in rapid succession were published on the history of marketing

thought (Bartels, 1962; Converse, 1959b; Coolsen, 1960; Schwartz, 1963). A wide-ranging collection of work on seventeenth-, eighteenth-, and nineteenth-century marketing practices was also published (Shapiro and Doody, 1968). And finally, a carefully researched, well-documented study of changes in American distribution channels during the nineteenth century provided some foundation for later studies of retailing history (Porter and Livesay, 1971).

History of marketing thought

Converse's (1959b) *The Beginnings of Marketing Thought in the United States* served as a transition, both in time and in depth of analysis, in the study of the history of marketing thought. One of Converse's students, Frank Coolsen, followed with a dissertation on the marketing ideas of four nineteenth-century liberal economists (Edward Atkinson, David Wells, Arthur Farquhar and Henry Farquhar), which was published in 1960 under the title *Marketing Thought in the United States in the Late Nineteenth Century*. According to Coolsen, the writings of those four economists presented a fairly comprehensive view of the scope and importance of marketing in the late nineteenth century. However, their work did not have much influence on the early twentieth century development of the marketing discipline (Jones and Shaw, 2002).

Two other books on the history of marketing thought which complemented each other were Bartels' (1962) *The Development of Marketing Thought* and Schwartz's (1963) *Development of Marketing Theory*. Bartels' book was essentially a chronology of published literature, university courses, and events that had played a role in the development of marketing thought since 1900. Schwartz was more concerned with specific theories in marketing. His was a more concentrated and rigorous follow-up to the 1951 collection edited by Hugh Wales (cited above). In addition to examining the development of well-recognized marketing theories such as retail gravitation, regional theory, marketing functions and Alderson's functionalist theory, Schwartz included chapters examining the potential contribution of fields such as social physics and game theory. That may explain why it has been largely ignored by students of the history of marketing thought. Bartels' book (1962), on the other hand, was twice updated (1976, 1988) and became a staple reading for many doctoral courses in North America. In addition to those general works, there were a few studies of specific concepts and theories during the 1960s. Examples included Hollander's historical analysis of retailing institutions (1960, 1963a, 1966), and historical examinations of marketing management by Keith (1960), Lazer (1965) and LaLonde and Morrison (1967).

During the 1960s some researchers began to integrate marketing history with the history of marketing thought. Such work went beyond the narrower approach of earlier writings by using the history of marketing practice to interpret the development of marketing thought. A good example of this was Hollander's work, cited above, and more recently his re-examination of the origins of the marketing concept (1986). Hollander's distinctive approach to historical research was deconstructed by Rassuli (1988).

Marketing history

As the marketing discipline moved away from the traditional institutional and commodity schools of thought and began to popularize marketing functions through the managerial approach, research into marketing history during the 1960s reflected that trend. This included historical research in advertising and promotion (McKendrick, 1960), product innovation (Silk and Stern, 1963), and personal selling (Hollander, 1963b, 1964). A broad range of marketing history, especially in economic development, regulation, institutions and advertising, was covered in Shapiro and Doody's (1968) *Readings in the History of American Marketing: Settlement to Civil War*. As editors of that extensive collection, Shapiro and Doody stated that their objective was to 'awaken the interest of students of marketing in history and historical analysis' (1968: 12). Their book of readings and Bartels' (1962) *Development of Marketing Thought* were probably the most important publications during the 1960s. In both of those books the scope of coverage was unprecedented.

However, as the 1960s drew to a close there seemed to be a decline of interest in historical research in marketing. After the publication of the Gordon and Howell (1959) report, the marketing discipline moved during the 1960s in a more quantitative, scientific direction and historical research may have seemed less rigorous and less relevant.

The new marketing history: 1980–2009

Returning to Table 3.1, the increase in number of publications since 1980 is dramatic. During the 1980s, a number of specialized conferences, collections of readings, and special issues of periodicals fuelled tremendous growth of interest in historical research in marketing. Perhaps most important was the organization of the biennial North American Marketing History Conference. In 1983 the first North American Workshop on Historical Research in Marketing was held at Michigan State University. That conference, now known as the Conference on Historical Analysis & Research in Marketing (CHARM), has been held biennially ever since. At 14 conferences over the past 26 years there have been 487 papers presented and published in the CHARM proceedings. The entire collection of papers is available online at the CHARM website, www.charmassociation.org. A history of the CHARM conference and content analysis of the first 13 conference proceedings is provided by Jones et al. (2009).

In the early 1990s, CHARM became a major contributor of content for the *Journal of Macromarketing* (see Jones and Shaw (2006) for a review of that body of work). From 1994 through 2008 historical research accounted for 72 of the 196 full articles published in *JMM* representing fully 37 per cent of that journal's content. Most of those articles were first presented at a CHARM conference. More recently, the CHARM Association was the driving force behind the new *Journal of Historical Research in Marketing*, which began publication in March 2009.

In 1985 and 1988 the Association for Consumer Research and American Marketing Association respectively held conferences that included a major focus on historical research in marketing. In 1990 the *Journal of the Academy of Marketing Science* published a special issue on the history of marketing thought. Most of those articles were originally papers presented at CHARM. Other journals to feature special issues on historical research in marketing included *Psychology & Marketing* in 1998 and *Marketing Theory* in 2005 and again in 2008. Since its inception in 2000, *Marketing Theory* has regularly published articles dealing with the history of marketing thought. In the UK, the University of Reading hosted conferences in 1991 and again in 1993 on historical research in marketing that resulted in the 1993 publication *The Rise and Fall of Mass Marketing* (Tedlow and Jones, 1993) which includes an interesting selection of papers about British marketing history. Strong interest in historical research in marketing in the UK is further evidenced by the formation in 1998 of the Centre for the History of Retailing and Distribution (CHORD) at the University of Wolverhampton which hosts annual workshops and seminars. Beyond these specialized marketing conferences and periodicals, there is a growing interest in marketing-related history by business historians which is represented by the Business History Conference and in periodicals such as *Enterprise & Society*, the *Business History Review*, *Economic History Review*, and others.

Reflecting on the increased volume, changing focus, and rigour of historical research in marketing since the early 1980s, Hollander and Rassuli described it as the 'new marketing history' (1993: xv). In addition to research on marketing history and the history of marketing thought, one of the important developments in historical research in marketing since 1980 is a growing discussion about the use of historical research methods in marketing.

Historical research methods and historical research in marketing

If one were looking for a single publication that signalled the emergence (or rather, the revival) of history as a 'legitimate' field within the marketing discipline, it might be Savitt's (1980) 'Historical Research in Marketing' published in the *Journal of Marketing*. In substance it was a statement of the rationale and method for historical research, although in the latter, only one of a range of possible approaches. In spirit Savitt's article was both a symbol of the legitimacy of doing historical research by marketing scholars, and a challenge to them to do so. As a statement on method, Savitt's article initiated a much needed discussion in the marketing literature about the theory and methods of historical scholarship.

'Historical Research in Marketing' thus represented an early attempt to articulate some of the methodological issues faced by marketing scholars interested in doing historical research, as well as a rallying cry for more historical research by marketing scholars and, as such, it created a bridge to the mainstream marketing

journals. More recently, Savitt (2009) used the format of a memoir to describe what he has learned about doing historical research over the last 30 years, how he learned, and how those lessons can be applied to historical research and teaching in marketing. Admitting that his earlier discussion of historical method was an oversimplified extension of logical positivism, Savitt's more recent work suggests a more interpretive approach to historical research in marketing. As Savitt (2009) concludes:

Good marketing history ... recognizes (1) historical events are in the past and cannot be known as contemporary events are known; (2) historical events are unique and unclassifiable; (3) history is about actions, statements, and the thoughts of human beings; and (4) historical events have irreducible richness and complexity. (2009: 198)

It is important to recognize that history is a discipline or subject, not a singular research method or methodology. There is a wide range of methodological approaches to studying history, from positivistic (e.g. Hempel, 1959) to hermeneutic (e.g. Collingwood, 1974), or from scientific to traditional (Jones, 1993). Like marketing, history is viewed by some as a social science (Golder, 2000; Kumcu, 1987; Savitt, 1980; Smith and Lux, 1993) capable of producing scientific knowledge, and by others as an art or as one of the humanities (Fullerton, 1987; Jones, 1998; Nevett, 1991; Savitt, 2009; Stern, 1990; Witkowski and Jones, 2006). History as social science tends to rely on formal hypothesis testing, development and testing of theory, classification and quantification of data, statistical analysis, and generalization. History as art relies more on unique, qualitative evidence, creative interpretation and descriptive narrative, sometimes described as storytelling. Both of these methodological approaches are used in historical research in marketing, yet even such pluralism is considered inadequate by Brown et al.'s (2001) postmodern critique of historical research methods in marketing.

Fullerton (1987) and Jones (1993) distinguish between the philosophy of history, which is concerned with epistemological and ontological issues, and historical method – the techniques of data collection, analysis, and reporting that follow from the philosophy of history in which one believes. While the philosophical assumptions of most marketing historians may be evident from their work, they are seldom made explicit. Published work rarely includes discussion of research method beyond a description of source materials, if that. And while some of the contributors to this historiographic discussion in marketing acknowledge different points of views (Golder, 2000; Smith and Lux, 1993; Witkowski and Jones, 2008), there is to date no complete discussion of the range of possible methodological approaches to historical research in marketing.

In the echoes of discussions about the philosophy and method of marketing history, there have also been voices calling for more historical research (Fullerton, 1987; Savitt, 1980, 1982), and providing rationales for using marketing history in teaching (Nevett, 1989; Witkowski, 1989a). Nevett (1991) described how historical method relates to marketing decision-making and

offered recommendations for applying historical thinking to marketing practice. As well, there are various descriptions of source materials for historical research in marketing (Jones, 1998; Pollay, 1979, 1988a; Rassuli and Hollander, 1986; Witkowski, 1994) and a discussion of various strategies for periodizing marketing history (Hollander et al., 2005).

Marketing history

Until the 1980s, historical research in marketing was dominated by interest in the history of marketing thought. That emphasis has since changed with most research now focusing on marketing history. Of the 487 papers presented at CHARM conferences from 1983 through 2009, 318 focused on marketing history (see Jones et al., 2009 for a content analysis of that body of work), the most popular topics being histories of industry/firm marketing strategies (94 papers), advertising history (74), macro-level consumption behaviour history (67), and the history of retailing and distribution channels (52). From 1981 through 2005, the 75 historical articles published in the *Journal of Macromarketing* included 47 that focused on marketing history (see Jones and Shaw (2006) for an historical review of that literature), with histories of marketing strategies leading in popularity followed by marketing regulation, retailing and channels, macro-level consumption behaviour and marketing systems.

The interest in histories of various aspects of marketing strategy, cited above, was also generally evident in periodicals and books that focused on advertising and promotion history (Beard, 2005; Branchik, 2007; Davis, 2007; De Iulio and Vinti, 2009; Fox, 1984; Gross and Sheth, 1989; Hawkins, 2009; Johnston, 2001; Jones et al., 2000; Kopp and Taylor, 1994; Laird, 1998; Lears, 1994; Marchand, 1985; Meyer, 1994; Mishra, 2009; Nevett, 1982; Pollay, 1984a, 1984b, 1985, 1988a, 1988b, 1994; Pollay and Lysonski, 1990; Pope, 1983; Robinson, 2004; Schudson, 1984; Sivulka, 1998; Stern, 1988; Witkowski, 2003), personal selling (Friedman, 2004), product simplification strategy (Hollander, 1984), product innovation (Keehn, 1994), channel management (Hull, 2008; Marx, 1985), segmentation strategy (Fullerton, 1985; Hollander and Germain, 1992; Tedlow, 1990), branding (Bakker, 2001; Church and Clark, 2001; Duguid, 2003; Golder, 2000; Koehn, 2001; Low and Fullerton, 1994), market research (Fullerton, 1990; Germain, 1994; Ward, 2009), retailing (Benson, 1986; Bevan, 2001; Dixon, 1994; Howard, 2008; Monod, 1996; Stanger, 2008; Witkowski, 2009), and marketing strategies in industries such as the public library system (Kleindle, 2007), and specific companies such as Nestle (Kose, 2007) and Singer (Godley, 2006). It would seem that no matter what your interest in marketing, there is now historical research about it in print.

As evident in Table 3.1, advertising and retailing are two major topics of interest within marketing history. In advertising history, the work of two marketing scholars is noteworthy. One of these was Terence Nevett who published extensively on the history of British advertising (1982, 1985, 1988a, 1988c, 1988d). Much of Nevett's work was comparative and cross cultural, for example, his study with Fullerton of

societal perceptions of advertising in Britain and Germany (Fullerton and Nevett, 1986), and of American influences on British advertising (Nevett 1988a), as well as British influences on American advertising (1988c). At times his work has taken on a macromarketing perspective (Fullerton and Nevett, 1986; Nevett, 1985, 1988b) by looking at the impact of advertising on society. Others have also contributed to the study of British advertising history, focusing on specific companies (Ferrier, 1986; Seaton, 1986), professional sales promotion organizations (Leigh, 1986), and self-regulation in the advertising industry (Miracle and Nevett, 1988).

A second marketing scholar whose work on advertising history has been prominent is Richard Pollay. During the late 1970s Pollay observed that there were very few significant sources of advertising history (1979: 8) and those had been written outside the marketing discipline. To address that situation, he outlined an ambitious research programme for advertising history, including the justification, research method, and data sources required for such work (Pollay, 1977, 1978, 1979). Having identified and developed important archival sources (Pollay, 1979, 1988a), Pollay conducted a rigorous content analysis of twentieth-century American print advertising in order to identify the portrayed values (Belk and Pollay, 1985; Pollay, 1984a, 1988b), the extent of informativeness (1984b), and the creative aspects of advertising strategy (1985). Later on, his work, like Nevett's, took on a macromarketing perspective (Pollay and Lysonski, 1990), specifically his work on the history of cigarette advertising and its impact on society. That interest in the history of cigarette advertising is shared by others such as Wilcox (1991) who examined the correlation between advertising and cigarette consumption for the period from 1949 to 1985 and Beard and Klyueva (2010) who provide a detailed account of one of the most controversial advertising campaigns of all time – the 'Reach for a Lucky instead of a sweet' cigarette campaign.

A wide range of methodological approaches to historical research is evident in advertising history. Pollay's use of quantification, content analysis and hypothesis testing is representative of the social scientific approach to historical research. In a similar fashion, Gross and Sheth (1989) performed content analysis of advertisements spanning 100 years in the *Ladies Home Journal* to investigate the use of time-oriented appeals. On the other hand, Stern (1988) has used literary criticism to examine the medieval tradition of allegory in relation to the development of contemporary advertising strategies. Nevett also used biographical data and a qualitative interpretation of advertisements to examine the development of British advertising (1988d).

There is an impressive collection of books about advertising history that has been published since the early 1980s, written by business historians (Fox, 1984; Johnston, 2001; Laird, 1998; Lears, 1994; Marchand, 1985; Norris, 1990; Pope, 1983; Robinson, 2004; Schudson, 1984; Sivulka, 1998). Laird's work is particularly valuable for marketing scholars because of its relatively broad scope in relating changes in advertising during the period from the late nineteenth-century through to the early twentieth century to changes in business culture and consumer marketing practice, and for its relevance to marketing strategy more generally.

Two of the more wide-ranging studies of marketing history focusing on marketing strategy more broadly are Tedlow's (1990) *New and Improved: The Story of Mass Marketing in America* and Strasser's (1989) *Satisfaction Guaranteed: The Making of the American Mass Market*. These are the two assigned readings in the undergraduate course I teach in marketing history at Quinnipiac University. Tedlow's book describes how some of America's most important corporations of the twentieth century, including Coca-Cola and Pepsi, Ford and General Motors, A&P, and Sears and Montgomery Ward, battled for dominance in key consumer product markets during the past 100 years. An emergent theme in Tedlow's work is the evolution of market structure in America from a fragmented market in the nineteenth century, to a mass market, and then to market segmentation. For example, with respect to the soft drink industry Tedlow concludes, 'there was no such thing as the Pepsi Generation until Pepsi created it' (1990: 372). It is that statement which is turned around in the title of Hollander and Germain's (1992) in-depth examination of the history of segmentation practices. Hollander and Germain disagreed with Tedlow's three-phase theory and provided detailed evidence of earlier segmentation practices as well as conceptualizations of segmentation by early marketing scholars.

Like Tedlow, Strasser (1989) covers a wide range of marketing strategies including branding, channel strategy, product development, market research, and advertising and promotion, as well as retailing. Both Tedlow and Strasser make extensive use of archival materials, trade periodicals, ephemera, and available company histories. Both clearly demonstrate that modern, sophisticated marketing practices were in place by the early twentieth century. One of the key differences between these two important studies of marketing history is the class of firm studied: Tedlow clearly focused on large corporations, Strasser on small-scale independent retailers. Another key difference between these two histories is the time period covered, with Strasser's more focused on the late nineteenth and early twentieth centuries. Tedlow covers most of the twentieth century.

Other subcategories of marketing history, more macro in orientation, have attracted considerable attention. First, corporate and industry marketing history has emerged as a popular topic of study (Carlos and Lewis, 2002; Godley, 2006; Hawkins, 2009). Second, the study of the history of marketing systems – whole economies or systems of marketing – also emerged during the 1980s as a significant topic for historical research (Corley, 1987; Fisk, 1988; Fullerton, 1988b; Kaufman, 1987; Kitchell, 1992; Pirog, 1991; Speece, 1990). This is undoubtedly related to the important role played by historical research in the *Journal of Macromarketing*, cited earlier. Pirog's (1991) study of changes in the structure and output of the US distribution system builds on Barger's (1955) seminal work mentioned earlier in this review. Of course, a key issue in the study of marketing systems is the relationship between marketing and economic development (Dixon, 1981; McCarthy, 1988; Savitt, 1988), and that critical role for marketing history has been used as a justification for more historical research in marketing since the late 1950s (Myers and Smalley, 1959).

One other major field of interest that has emerged since the early 1980s is the history of consumption. Some of this work has been carried out by marketing scholars interested in consumer behaviour (Belk, 1992; Belk and Pollay, 1985;

Friedman, 1985; Witkowski, 1989b, 1998, 2004). However, there is a growing body of literature on the history of the 'consumer society' written by business historians (Blaszczyk, 2009; Cohen, 2003; Cross, 2000; Donohue, 2003; Fox and Lears, 1983; McKendrick et al., 1982). The ideology behind much of this work, like that by other business historians writing about advertising history, is more liberal and more critical of marketing's impact on consumer welfare than typical of marketing scholars studying marketing history.

History of marketing thought

Earlier research on the history of marketing thought focused on identifying the first textbooks, university courses, and pioneer teachers. During the 1960s some work began to trace the development of key marketing concepts and theory. During the 1980s and since, there have been much more sophisticated historical studies of influences on the development of marketing thought, of the evolution of schools of marketing thought, and examinations of important theoretical developments over time. As well, there has been renewed interest in biographical research. While the relative volume of work on the history of marketing thought has declined (compared with marketing history) since the early 1980s, there has been important work published including the final edition of Bartels' seminal book (1988), a survey of schools of marketing thought (Sheth et al., 1988), edited collections of readings (Baker, 2001; Hollander and Rassuli, 1993; Tadajewski and Jones, 2008; Wooliscroft et al., 2006) and book-length studies of the history of marketing management (Usui, 2008) and advertising education (Ross and Richards, 2008). There have also been broader studies of the development of the marketing discipline that complement Bartels' earlier work (Jones and Shaw, 2002; Wilkie and Moore, 2003) as well as historical studies of schools of marketing thought (Shaw and Jones, 2005; Sheth et al., 1988).

Since the early 1980s, there has been less research on the history of the marketing literature. Grether's (1976) 40-year review of the *Journal of Marketing (JM)* was followed by a 60-year retrospective of *JM* by Kerin (1996) and there is a related, detailed study of the founding of *JM* by Witkowski (2007). There have been retrospectives of other major journals in the field of marketing (Berkman, 1992; Muncy, 1991) and, while somewhat dated now, McCracken's (1987) is a very good review of the consumption history literature. More recently, there has also been less research about the history of marketing teaching (Lazer and Shaw, 1988; Schultz, 1982) but some on the teaching of marketing history (Witkowski, 1989a). There remains a need, however, to examine such developments that occurred outside the United States, such as in Jones' (1992) study of early marketing courses in Canada and Jonsson's history of early marketing education in Sweden (2009).

There is renewed interest in biographical research (Bourassa et al., 2007; Green, 2001; Harris, 2007; Hollander, 2009; Jones, 1994, 1998, 2004, 2007; Kreshel, 1990; Nason, 2009; Shaw and Tamilia, 2001; Wittink, 2004; Wright, 1989;

Wooliscroft et al., 2006) which had dropped from the historical agenda after the early 1960s. In that connection, the third edition of Bartels' (1988) *History of Marketing Thought* is notable for its addition of biographical information about important scholars of the 1960s, 1970s and 1980s. Some 35 short biographies of marketing pioneers are included in a recent three-volume collection of readings on the history of marketing thought (Tadajewski and Jones, 2008) including many from the original *Journal of Marketing* series published between 1956 and 1962, as well as more recent biographical sketches. Stephen Brown has added an interesting dimension to this biographical work by analysing the writing styles of several pioneer marketing scholars, including Theodore Levitt (Brown, 2004), Stanley Hollander (Brown, 2009) and Wroe Alderson (Brown, 2002).

Biographical work is featured in a noteworthy collection of work examining the life and career of Wroe Alderson, considered by many to be the greatest marketing theorist of the twentieth century, in *A Twenty-First Century Guide to Aldersonian Marketing Thought* (Wooliscroft et al., 2006). This encyclopaedic historical study of Alderson and his work is divided into six parts including a biographical sketch of Alderson, selected writings by Alderson about his theory of market behaviour and about marketing management practice, commentaries about Alderson's thinking by other well-known scholars, some fascinating biographical commentaries from other scholars about Alderson, and finally exhaustive bibliographies of Alderson's published work. As one reviewer described it, this collection of readings is 'a fitting tribute to the life, writings, and intellectual legacy of Wroe Alderson ... and a reference work of the first magnitude' (Shaw, 2007). Shortly following the publication of this collection of readings, the *European Business Review* (2007, Vol. 19(6)) published a special issue about Alderson adding to the body of work about this pioneer marketing scholar. And finally, Tadajewski (2009d) documented Alderson's trip to Russia as part of a Quaker-organized visit to comment on US foreign policy. The latter work adds an interesting detail to our knowledge about Alderson.

Alderson was best known as a marketing theorist and the history of ideas and theory in marketing now attracts considerable attention. This work includes historical studies of Reilly's retail gravitation theory (Brown, 1994), spatial theory in retailing (Babin et al., 1994), motivation research (McLeod, 2009; Tadajewski, 2006), service marketing (Vargo and Lusch, 2004; Vargo and Morgan, 2005), channels theory (Wilkinson, 2001), the four utilities concept (Shaw, 1994), and marketing productivity. Both Shaw (1987, 1990) and Dixon (1990, 1991) have done extensive work on the historical development of the concept and measurement of marketing productivity. Shaw's historical review of empirical studies concludes that marketing productivity in the United States during the past century has increased, but he points to the continuing lack of clear concepts and measures of marketing costs and effectiveness (1990: 290).

One theory, in particular, has generated much controversy and considerable interest for marketing historians. It is, in fact, an historical stage theory of marketing's development – the so-called four eras of marketing, first proposed by Keith in 1960. The essential historical question here is when the 'marketing concept' and its

closely related notion of relationship marketing emerged, and not just the practice but the articulation of this concept. Hollander (1986), Fullerton (1988a), Gilbert and Bailey (1990), Jones and Richardson (2007) and Tadajewski (2009b, forthcoming) have all published detailed, critical historical accounts of the development of the marketing concept and Church (1999) provides an overview of related historical work. A parallel line of research by Tadajewski examines the history of relationship marketing (Tadajewski, 2008, 2009a, 2009c; Tadajewski and Saren, 2009) building on similar work by Keep et al. (1998). As a body of work, these studies all concluded that serious and sophisticated marketing activities driven by a customer orientation have been practised much longer than conventional wisdom suggests, and that marketers have used a customer or marketing orientation at least since the nineteenth century. With some measure of poetic justice, Tadajewski (forthcoming) uses FBI files to test Keith's own (1960) claims regarding the marketing practices adopted at Pillsbury during the so-called 'marketing' and 'marketing control' eras. Tadajewski documents the participation of Pillsbury in anti-competitive practices beginning in 1958, continuing through the mid-1960s and resulting in Pillsbury being charged and fined for their involvement in a price fixing cartel, behaviour that is hardly consistent with a consumer-friendly, relationship-building, 'marketing orientation'.

Taken together, these studies point to the value, and in some cases the necessity, of historical research in evaluating existing theory, *especially, of course, historical theory*. More importantly perhaps, they have contributed to a more critical perspective and to a rewriting of the history of marketing thought presented by Bartels and other mid-twentieth century marketing historians. This includes an extensive re-evaluation of the schools of thought from which marketing emerged as a discipline (Jones and Monieson, 1990), an extension of our historical perspective beyond the twentieth century (Dixon, 1978, 1979, 1981, 1982) and studies of the development of marketing thought outside North America (Ingebrigtsen, 1981; Jones, 1992; Jones and Monieson, 1990; Jonsson, 2009; Usui, 2000). Ironically, a Japanese scholar has recently taken a much more detailed look at the emergence of marketing management in America between 1910 and 1940 (Usui, 2008). That work is distinctive for its focus on the connections between scientific management and the early development of marketing management ideas.

Schools of marketing thought have attracted increasing attention from marketing historians. Discussions of the so-called traditional schools – institutional (Hollander, 1980), functional (Hunt and Goolsby, 1988) and commodity (Zinn and Johnson, 1990) – have been complemented by studies of more contemporary schools of thought, including consumer behaviour (Kassarjian, 1994; Mittelstaedt, 1990; Sheth and Gross, 1988), macromarketing (Layton and Grossbart, 2006; Savitt, 1990) and others (Shaw and Jones, 2005; Sheth et al., 1988). In *Marketing Theory: Evolution and Evaluation* (1988), Sheth et al. identified, classified and evaluated 12 schools of marketing thought comprising commodity, functional, regional, institutional, functionalist, managerial, buyer behaviour, activist, macro-marketing, organizational dynamics, systems, and social exchange schools. The

classification and meta-theoretical 'evaluation' by Sheth et al. could easily be debated, but are not essential to the historical theme which provides the bulk of the presentation. Using the Sheth et al.'s work as a point of departure, Shaw and Jones (2005) identified and chronicled 10 schools of marketing thought, beginning with the traditional functional, commodities, and institutional schools; adding the interregional school; and followed by more modern schools of marketing management, marketing systems, consumer behaviour, macromarketing, exchange, and even marketing history. The theme that emerges from this work is a lament over the growing loss of identity, vagueness of subject matter and lack of disciplinary boundaries in marketing. Much of that theme overlaps with Wilkie and Moore's (2003) study which divided the development of the marketing discipline into four eras: (1) founding the field of marketing (1900–1920); (2) formalizing the field (1920–1950); (3) a paradigm shift to more managerial and scientific perspectives (1950–1980); and (4) fragmentation of the mainstream into specialized interest areas (1980–present).

If the Sheth et al. (1988) book replaced Bartels' (1962, 1976, 1988) classic as the staple reading material for doctoral courses during the late 1980s and into the early 1990s, it too was eventually replaced by a two-volume set of readings by Hollander and Rassuli (1993). Hollander was an outspoken critic of Bartels' work on the history of marketing thought and for the doctoral course Hollander taught at Michigan State University (Jones and Keep, 2009) he developed a comprehensive set of readings on both marketing history and the history of marketing thought (Hollander and Rassuli, 1993), a collection that in several ways suggested a new approach to teaching the history of marketing thought to graduate students of marketing. Hollander believed that one could not understand the history of marketing thought without a parallel understanding of marketing history, and included both fields in this two-volume collection. The readings also included discussions of a wide range of macromarketing issues, marketing research and consumer behaviour, in addition to the more obvious material about the history of various aspects of marketing strategy. The collection also included several selections about historical methods in marketing.

Fourteen important readings about the history of marketing thought are included in Baker's (2001) multi-volume collection on critical perspectives in marketing. The historical work there includes some older, seminal works that are difficult to access. Another distinctive feature of this collection is the inclusion of European authors, for example Gilbert and Bailey (1990) and Vink (1992), whose work is often overlooked.

A more recent, three-volume collection of readings, edited by Tadajewski and Jones (2008) is respectfully entitled *The History of Marketing Thought*. (That was the same title used by Bartels for his seminal work in this area.) Like the Hollander and Rassuli collection of readings, this more recent offering takes a much broader approach than that by Bartels and earlier historians. At the same time, the Tadajewski and Jones (2008) collection is more focused than the Hollander and Rassuli collection or the Baker collection, including only articles on the history of marketing thought, and has more depth in that area, blending vintage historical scholarship with much of the more recent contemporary work.

The Tadjewski and Jones collection begins by examining historical research about pre-twentieth-century marketing thought, segues into several key readings about the early development of the marketing discipline, and includes considerable coverage of the schools of marketing thought. The collection features 35 biographical sketches of marketing pioneers, including recent work on Robert Bartels, Stanley Hollander and Sidney Levy. This extensive collection of biographical sketches provides details about the intellectual backgrounds and political context of key marketing thinkers and in that way is intended to connect theoretical debates in marketing with wider socio-political changes. A final section of the readings in this collection continues that ideal by focusing on more macro, contextualizing influences on marketing thought.

The emerging discipline: today and tomorrow

History adds perspective, richness, and context to the study of marketing. More practically speaking, history provides a framework for building and integrating knowledge. We must know where we've been in order to understand where we are, to know what questions have already been answered and which ones still need further study. The history of marketing and marketing ideas has not always been a popular or rewarding field of study. That has clearly changed. Yet, ironically, there was also a time when the study of the history of marketing thought was required in many, if not most, doctoral programmes in marketing. Sadly, that no longer seems to be the case. So while more scholars are doing more and better historical research in marketing, fewer marketing students are being educated about marketing history and the history of marketing thought.

Historical research in marketing has developed over time, naturally enough, from recording the facts about the founding of the discipline, to studies of marketing practices and the ideas about those practices, to schools of thought and eras of study. Over time marketing historians have extended the scope of history beyond the turn of the twentieth century, beyond the core elements of marketing strategy, and have broadened their tool kit of historical methods of research. We have used history to situate the current status of the marketing discipline and have critically evaluated conventional wisdom about how and when key marketing practices and concepts emerged. There has long been a place for marketing history as a component in the work done by business historians, but more business historians are specializing in marketing history, especially in advertising history, retailing history, and the history of consumption. That is also broadening the study of marketing history in some valuable ways.

Over the past 30 years there has been a dramatic growth of interest and activity in marketing history and the history of marketing thought. Specialized academic associations have been formed that sponsor conferences on historical research in marketing. Historical research is now explicitly included in statements of scope and content for several marketing periodicals and we can celebrate the

launch of a new academic quarterly dedicated to publishing historical research in marketing. There is a bounded body of knowledge about marketing history and the history of marketing thought and a critical mass of academics that self-identify as marketing historians. In some ways, marketing history (more broadly defined) might qualify as a discipline according to the criteria used by Richardson in his recent study of the development of accounting history (Richardson, 2008; Witkowski and Jones, 2008).

What are some of the priorities for future historical research in marketing? There needs to be greater synthesis and contextualization of marketing history and the history of marketing thought. Too many studies have focused on marketing practices or marketing ideas in isolation without considering the social, economic, and political conditions of the time period being studied. Further, in that connection, we need to acknowledge that practice is not entirely thoughtless and that thought, especially in a discipline that has relied so much on inductive reasoning, is driven by practice. In other words, marketing history and the history of marketing thought must be integrated. This was the foundation of Stanley Hollander's thinking about historical research in marketing (1989). However, as a 'discipline', marketing history still has not made much progress in that direction.

Most of the historical research about marketing and marketing thought is done by marketing scholars trained in social science research methods and can be, therefore, naive about even the most basic historiographic issues, such as the differences between primary and secondary source material. There is a need for more discussion of the broad range of historical research methods, illustrated with examples from historical research in marketing. Finally, marketing historians need to make their work more relevant to marketing education. Marketing history and the history of marketing thought must be integrated into graduate, certainly, and even undergraduate curricula. As Richardson (2008) notes in his history of accounting history, 'the ultimate test of an academic discipline is its ability to offer courses in its own area' (2008: 268). I hope the student text you are reading now will help in that connection.

Recommended further reading

Journal of Historical Research in Marketing

Marketing history

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History of marketing thought

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