

## **Historical Research in Marketing Theory and Practice: A Review Essay**

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### **Summary Statement of Contribution**

This article provides a review of the last thirty years of historical marketing research. It engages with the key areas likely to interest the multiple audiences of the *JMM* whether they are managerial, cultural or critically oriented in their research.

# **Historical Research in Marketing Theory and Practice: A Review Essay**

## **Introduction**

A thirtieth anniversary issue provides us with an opportunity to step back and look at the development of marketing from a historical perspective. In recent years, there has been a distinct historical turn, with some of the most prominent scholars in our field encouraging a greater degree of historical reflection, using it to inform theory, conceptual development and pedagogy (e.g. Dholakia, 2012a, 2012b; Hunt, 2010; Petkus, 2010; Witkowski, 1989). We are deeply sympathetic to the idea that history adds context and richness to our self-understanding as a community of scholars and practitioners (Fullerton, 2011). It helps us avoid reinventing the wheel (Tadajewski & Saren, 2010). It helps frame and legitimise the contributions to marketing knowledge that we make (Hollander, 1985). And, to cap it all, it ensures we provide appropriate gestures to our intellectual predecessors. This is an important point.

The intellectual path to the present day has been marked by contributions from numerous academics, practitioners and those who operated between these domains who approached their endeavours by drawing from the best and widest perspectives of their time, using these to scrutinise the development of the marketing and advertising systems, as well as consumer practice. Their work was often affirmative, constructive, ethically and critically minded (e.g. Zuckerman & Carsky, 1990). It cuts across the boundaries that we sometimes see reified today between mainstream, cultural, macromarketing and critical marketers (Belk, 2014; Dholakia, 2009; Firat, 2014; Hackley, 2009; Reibstein et al., 2009; Saren, 2009; Sherry, 2014), perhaps revealing an important lesson in doing so (cf. Monieson, 1988, 1989).

While it is easy to think from the misleading narratives that appear in many of our textbooks (Jones & Richardson, 2007) and are repeated within prominent journal outlets (Tadajewski & Jones, 2008), that the intellectual birth of the discipline – the Copernican-like turn at which the main concepts and ideas were developed (Keith, 1960) – can be traced to the post-World War II era (e.g. Webster, 1988), historical reflection suggests we need to be less egocentric. The earliest scholars and practitioners were often sophisticated thinkers whose ideas have a greater degree of commensurability (and points of disjuncture as well) to those that form the mainstream of the canon today.

We believe that being historically minded is central to good academic practice (Hunt, 2012, 2013). Indeed, history and the production of marketing theory and thought, not to mention the preparation of future practitioners go hand-in-hand. As Witkowski (1989, p. 55) reminds us,

‘The study of history will contribute much to the developing managerial skills and judgment of marketing students. Learning from the lessons of the past will help students avoid naïve perceptions and statements and, instead, learn from the lessons of the past. Historical knowledge provides a much needed reference point.’

Reference points that we often lack unfortunately.

## **The Loss and Recovery of Historical Memory**

Before we start to outline our main project, some context is appropriate in a general marketing journal. Historical research about marketing began to be published during the early 1930s. The post-World War II period saw dramatic changes in the nature of marketing scholarship that reflected wider criticism of business education and the rigour and relevance of its research. There was a perception that marketing research was somehow less scholarly, less credible than it should or could be. It was too descriptive (Kassarjian, 1994, Kassarjian & Goodstein, 2010). This necessitated a response and Bartels (1988), the famous marketing historian, described the 1950s and 1960s as a period of intellectual ‘upgrading’, when older descriptive research was avoided by those who wished to ensure their work had academic respectability.

This was the time of the behavioural science ‘revolution’, the further turn towards the hypothetico-deductive approach, when there was a widespread desire to ensure that marketing research was relevant to practitioners. Such an intellectual revolution led to the marginalisation of history (Savitt, 1980). This is unsurprising. Attention was focused not just on the present, but on the future, and the ideals of prediction that underwrite so much scholarship did not sit comfortably with historically-oriented research. In spite of this, a historical orientation did not lay beyond the pale for too long. During the early 1980s, a number of specialised conferences and collections of readings fuelled a dramatic growth of interest. The Conference on Historical Analysis & Research in Marketing (CHARM) which has been held biennially since 1983 was notably significant in supporting historical research.

For a number of observers, history offered a way to compensate for the limitations of the behavioural and psychological approaches that held sway:

‘During the past decade, consumer researchers have initiated a substantial broadening of methodological orientation. This has resulted from recognition that social science research paradigms based in economics, cognitive psychology, and behaviorism, long dominant in consumer research, limit the research questions the discipline can answer.’

(Smith & Lux, 1993, p. 595)

These authors link the interest in history to the ‘interpretive turn’, a turn which encouraged reflections on marketing and consumption phenomena from historical, cultural, psychoanalytical and other perspectives (Brown, 1995). And Smith and Lux are especially articulate with respect to the contribution that historical research can offer to the academy and practice:

‘...history stands virtually alone among the social science disciplines in its ability to analyze particular episodes or empirical cases, and to explain broad-gauged patterns of social, cultural, political, economic, and intellectual activity. In exploring change, historical research questions actually emphasize complexity rather than simplicity...The historian’s insistence on including the full complexity of human activity within the research domain is the basis for history’s potential as a research tool for analyzing complex and volatile consumer phenomena.’

(Smith & Lux, 1993, p. 595)

It is these facets of historical research that make it so central, yet so daunting to those wanting to engage with it. This said, the intellectual community has risen to the challenge and the growth in published historical research is illustrated in Table 1. This shows the cumulative number of publications by decade since 1930, as listed in the Google Scholar

database. It includes peer-reviewed papers, theses, books, abstracts, and articles from academic publishers, professional societies, reprint repositories, universities, and other scholarly organisations.

Using the search phrases indicated in Table 1 yielded a cumulative 6,566 entries for historical research in marketing from 1930 through to May 2012. These searches undoubtedly understate the actual amount of research activity since some authors do not use those phrases in their publications. For example, during the 1930s and 1940s there were a number of studies published in the *Journal of Marketing* about the origins of the discipline that are not registered in searches of the Google Scholar database.

The growth in historical research since the 1980s has led to the publication of overviews of this literature periodically. For instance, most publications prior to 1980 were covered in Jones' (2010) history of historical research in marketing. Jones et al (2009) presented a content analysis of the 445 papers presented at CHARM conferences from 1983 to 2007 and traced the impact of CHARM on publishing activity more generally. On a related note, Jones and Shaw (2006) reviewed the strong record of the *Journal of Macromarketing* in publishing historical research from its inception in 1981 through to 2006. While these studies offer intellectual substance, for those not typically interested in marketing history and the history of marketing thought, they can seem a little abstract, leaving the reader wanting to know more about the qualitative changes and movements of our intellectual architectonic.

Clearly, to delve into the range of marketing history that is available is a difficult task. It requires selectivity and our review is restricted to journal articles and books published from 1980 to 2013, focusing mainly on marketing management as defined by the 'aims and scope' of the *Journal of Marketing Management* (JMM), including marketing management, market research, market segmentation, product management, marketing thought and practice, along with marketing and the consumer society.

Marketing management is not undertaken in a vacuum, affecting only those within the organisation and its customers. It shapes the society in which it is practiced, performed and controlled at the macro and micro levels. To reflect this, we incorporate discussion of related issues which fall under the remit of marketing's effects on wider society; an area we designate as 'consumer society'. Related to this, we engage with the relationship between marketing and the management of subjectivity. We subsequently explore the growing calls for historical research to form an influential component of interpretive, consumer culture theoretic and critical marketing research. Broadening our focus in this way thus ensures the relevance of the present paper for all the intellectual communities in marketing from managerial to culturally oriented scholars as well as advocates of critical marketing studies.

The contribution of this paper is three fold: firstly, we engage with the historical development of marketing management. Secondly, we offer a qualitative review and critical discussion of such debates. Thirdly, our paper is intended to help the non-specialist navigate the pathways of the development of marketing management theory and thought.

**Table 1: Cumulative Volume of Historical Research in Marketing**

<b>Ending Date</b>	<b>Marketing History<sup>1</sup></b>	<b>Retailing History<sup>2</sup></b>	<b>Advertising History<sup>3</sup></b>	<b>Combined History of Marketing<sup>4</sup></b>	<b>History of Thought<sup>5</sup></b>	<b>Total</b>
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1940	7	0	2	9	0	9
1950	17	3	12	32	0	32
1960	29	4	30	63	0	63
1970	40	19	66	125	0	125
1980	89	27	141	257	7	264
1990	244	68	356	668	52	720
2000	680	188	1,014	1,882	165	2,047
2010	2,021	705	3,070	5,796	614	6,410
2012	2,082	716	3,130	5,928	638	6,566

Source: Google Scholar database accessed May 25, 2012. Includes peer-reviewed papers, theses, books, abstracts, and articles from academic publishers, professional societies, reprint repositories, universities, and other scholarly organizations. The search phrases used here capture the major categories of historical research in marketing.

<sup>1</sup> Using the search phrases ‘marketing history’ and ‘history of marketing’, with ‘history of marketing thought’ excluded to avoid double counting.

<sup>2</sup> Using the search phrases ‘retail history’, ‘retailing history’, and ‘history of retailing’, with ‘marketing history’ excluded to avoid double counting.

<sup>3</sup> Using the search phrases ‘advertising history’, and ‘history of advertising’, with ‘marketing history’ excluded to avoid double counting.

<sup>4</sup> Total of marketing history, retailing history, and advertising history.

<sup>5</sup> Using the search phrase ‘history of marketing thought’.

## Methodology

Bearing in mind the various restrictions on our literature search discussed above, each author independently generated a substantial list of material that resulted from the use of search terms noted in the table above. The search was interdisciplinary, ranging across the social sciences and humanities. We subsequently shared our respective lists. Using a categorisation scheme suggested by the topical focus of the *JMM*'s ‘instructions to authors’, we proceeded to identify areas of agreement and disagreement on categories and content. This process was iterative and qualitative in nature, with the resolution of disagreements facilitated by each author articulating why inclusion in a given category was appropriate or not. It is a selective sample of work but sufficiently large to provide a solid overview which is organised thematically. We describe the trends studied and critically assess the nature and scope of historical research.

## Marketing Management History

The essence of marketing management is marketing strategy, the creation of superior customer value through the use of marketing mix elements. This involves the ability to select markets in which the firm can operate with competitive advantage, to understand competitive dynamics and how markets evolve over time, to set goals in terms of selected product-markets, and to understand how the marketing mix can be used to accomplish those objectives. The foundation of successful marketing strategy is the ability of a marketing manager to understand customers (markets) better than any competitor and to allocate scarce resources (through market segmentation, targeting, and positioning) to markets where the firm has superior strategic fit. If there is a starting point for developing marketing strategy, then, it must be with market research.

## *History of Market Research*

Prior to the 1980s there was very little study of the history of market research and all of it focused on the individuals and institutions instrumental in formalising market research practice and teaching in America during the early century (Jones, 2010). The explosion of research on marketing history since the 1980s includes a great deal of work on the development of market research. There are several themes in this literature. The development of survey research has been the subject of some of the most detailed studies and a major theme of others. Neither of the two major works on the history of survey research focuses exclusively on marketing applications (Converse, 1987; Robinson, 1999). While market research is described by Converse (1987) as the ‘most direct line’ in the development of survey research, her book devotes considerable space to developments in sociology, policy research, and the roles of universities and government in developing this methodological tool. Robinson’s (1999) primary focus is political polling but, like Converse, he recognises the ancestry of public opinion polling in earlier developments by market researchers.

The only general historical overview of market research published in the last thirty years is Stewart’s (2010) book chapter which is broad in chronological and topical scope but predictably brief. He guides us through the ‘pre-history’ of market research in the nineteenth century, then engages with the familiar beginnings of formal research by advertising agencies and early academic contributions by Harlow Gale and Walter Dill Scott, practitioners such as J. George Frederick and George Eastman, and institutions including the Harvard Bureau of Business Research funded by Arch Shaw, a major early contributor to the development of marketing thought (Jones, 1992; Jones & Monieson, 1990).

Most of Stewart’s chapter describes key developments in market research technique including focus group research by Lazarsfeld and Merton; survey research and sampling by Gallop, Lazarsfeld, Roper, and Crossley; experimental design by Scott, Starch, Hopkins, and others; and multivariate analysis. Interestingly, in a separate study of the adoption of statistical techniques by market researchers, Germain (1994) notes that early twentieth century texts ignored the statistical techniques which were already in circulation. He speculates this may have been due to the limited training received by college undergraduates at that time, as well as the fact that market research professionals relied on large sample sizes alleviating the need for inferential statistics. Other work on market research technique highlights the pioneering role of Pauline Arnold in radio audience measurement through the use of coincidental telephone surveys and in the mobilisation of a national field staff for survey research (Jones, 2013).

Several published case studies have examined specific organisations and individuals involved in the development of market research. J. Walter Thompson (JWT), most notably, has been the subject and source for several studies due to the outstanding archival records available for the company (Kreshel, 1990; Nixon, 2012; Robinson, 1999). Researchers have investigated the efforts by agency President, Stanley Resor, to make the company’s research more scientifically rigorous (Kreshel, 1990) and JWT’s engagement with qualitative market research during the 1920s and 1930s (Schwarzkopf, 2009).

In addition, the last thirty years have been a rich period for biographical research. The large literature includes reviews of the pioneering experimental psychology conducted into the evaluation of advertising effects by Harlow Gale (Eighmey & Sar, 2007), the behaviourist contributions of John B. Watson (Kreshel, 1990), and surveys of psychologically oriented

scholars who were moving in industry circles (Benjamin, 1997; Landy, 1997). More recently, the emergence of interpretive and qualitative research has been examined, especially as part of a growing interest in the significance of motivation research (e.g. Fullerton, 2013; McLeod, 2009; Schwarzkopf, 2007; Schwarzkopf & Gries, 2010; Tadajewski, 2006, 2013). On its own this is the most studied topic in the history of market research, with Ernest Dichter, the leading figure in this area, garnering much attention. He was the son of a Jewish family in Austria who moved to the United States in 1938 where he later founded the Institute for Motivational Research. He became well known during the 1950s when he advised corporations on how to uncover the 'hidden' motivations of consumers. He was a 'hidden persuader' in Packard's (1957) controversial critique of American marketing.

Via a close reading of Dichter's work, Tadajewski (2006) has made connections between this variant of motivation research, linking it to contemporary perspectives like Consumer Culture Theory (Arnould & Thompson, 2005). Specifically, he questions the idea that interpretive research came to prominence during the 1980s and 1990s. Adopting a historical position reflective of the work of Michel Foucault, he illuminates the axiology, epistemology, methodologies, and view of human nature that underwrote Dichter's form of motivation research. The Schwarzkopf and Gries (2010) volume on Dichter includes biographical material and many of the chapters engage with a rich and varied tapestry of issues. Since each moves across disciplinary boundaries, we will note the key topics explored across the volume. These include consumer culture (Horowitz, 2010; Tadajewski, 2010; Blaszczyk, 2010; Hellman, 2010), feminism (Horowitz, 2010; Parkin, 2010), and the methodology of motivation research (Tadajewski, 2010; Gries & Schwarzkopf, 2010) among others.

Furthermore, whilst Dichter's impact is worthy of attention, an important move in this literature has been to explore other contributors to consumer motivation studies. These include Sidney Levy (Harris, 2007), Herta Herzog, Louis Cheskin, Steuart Henderson Britt to name just a few. In her account of the rise of motivation research in Australia, McLeod (2009) examines David Bottomley's studies of the influence of colour on consumer attitudes and references other forms of motivation research beyond that practiced by Dichter. Dichter, of course, is not the only market researcher whose contributions to the field have been documented. We mentioned above that historical study of market research prior to 1980 focused on individuals and institutions. This pattern has been continued and includes biographical studies of Percival White (Jones & Tadajewski, 2011; Tadajewski & Jones, 2012) and Pauline Arnold (Jones, 2013) who founded the Market Research Corporation of America. Attention has been focused upon Charles Coolidge Parlin (Ward, 2009, 2010) who directed market research at the Curtis Publishing Company, along with Henry Weaver's work as head of customer research at General Motors (Marchand, 1998). Paul Lazarsfeld's market research studies undertaken in central Europe at the Institute for Economic Psychology from 1926 to 1933 have also merited close scrutiny (Fullerton, 1990).

Finally, since market research practices vary from country to country, and industry to industry, historical case studies have been published on the market research efforts of the American and British motion picture industry (Bakker, 2003), American patent medicines (Robinson, 2012), the American cotton industry (Pietruska, 2012), French real estate (Yates, 2012), and the research efforts by the American gasoline industry to target women (Donofrio, 2012). There has also been a reaction to the traditional emphasis on American practice and scholarship resulting in studies of market research in Canada (Blankenship *et al.*, 1985),

Australia (McLeod, 2009), Britain (Schwarzkopf, 2007; 2009, 2012) and other European countries (Berghoff *et al.*, 2012).

In summary, then, the history of market research has witnessed a major period of growth, with scholars shifting their attention from an almost total focus on the United States as the crucible of practice and development, to study other countries and their uses and applications of market research.

### **History of Market Segmentation**

The practice of segmenting markets is a key ingredient of marketing strategy and inextricably connected with the marketing concept and relationship marketing. Despite the continued prevalence of the belief that the marketing concept and market segmentation both originated in the 1950s (Keith, 1960; Smith, 1956), such assumptions have been repeatedly undermined by historical scholars (e.g. Fullerton, 1988, 2012; Hollander, 1985; Hollander & Germain, 1992; Rappaport, 1996; Tedlow, 1990).

There has been a lively debate about the origins of market segmentation, a wide range of industry-specific studies (e.g. Petty, 1995; Quickenden & Kover, 2007; Walsh, 2011), focused research on segmentation by individual companies (e.g. Hollander & Germain, 1992), and attempts to periodise the evolution of segments such as the gay market (e.g. Branchik, 2002), the African-American market (e.g. Branchik & Davis, 2009) and the American seniors market (e.g. Branchik, 2010).

In an important contribution to this literature, Tedlow (1990) has developed a three-phase historical model of marketing, crediting a key role for production technology as a driver of marketing practice. His three phases were characterised by: (1) fragmented markets and a corresponding lack of market segmentation (nineteenth century), (2) the emergence of a large national market targeted using simple mass marketing (<1950s), and (3) the mid-twentieth century use of demographic and psychographic segmentation. Thus, Tedlow proposed that segmentation as we know it today originated during the 1950s. He later added a fourth phase exemplified by mass customisation (Tedlow, 1993). While Tedlow (1990) did provide detailed case studies to 'test' his model (e.g. Tedlow, 1997), further research has yielded little direct support for his theory (Church, 1993; Hollander & Germain, 1992; Sparks, 1993; Morgan & Moss, 1993).

Fullerton (2012), for example, gives us one of the earliest and most detailed studies of segmentation, focusing on the German book trade from 1800 to 1928. He describes how it was first developed by publishers who used sophisticated segmentation by age, gender, occupation, educational level, religion, geography, social class, income, shopping preferences, benefits sought, deal proneness, price sensitivity and lifestyle to develop their markets. Fullerton explains the inductive connection between segmentation practice and the conceptualisation of segmentation, crediting a publisher, Horst Kliemann, with the first full discussion of market segmentation in a 1928 book.

So, overall, there is a very wide range of products or industries for which historical studies have been published, studies that look at segmentation practices as far back as the eighteenth century and pinpoint the conceptualisation of market segmentation as early as 1928.

### ***Product Management History***

There are three major themes running throughout research on product management including the history of branding, product development and packaging. Of these, branding history has rapidly become the most popular and is the focus of articles by Bastos and Levy (2012) and Moore and Reid (2008). These collaborations use a broad interpretation of the meaning of brand and branding, from the literal interpretation of burning and marking artefacts through to the ‘golden era of branding’ as a much more complex phenomenon at the core of modern marketing.

Moore and Reid examine the transition in branding practices from the utilitarian provision of information to image building and on to brand personality through six historical periods dating from 2250 BC to modern times. Both papers are noteworthy for attempting to survey the development of practice as well as theory. The latter has a shorter history than the former. Succinct general reviews of branding history are offered by Low and Fullerton (1994) whose primary focus is the history of the brand management system in America, by Eckhardt and Bengtsson (2010) as part of their study of three thousand years of branding in China, and by Petty (2011) in his documentation of the origins of U.S. trademark law.

As is evident in Table 2, the golden era of branding is generally thought to be from the late nineteenth to early twentieth century. Most of the work referenced in this table consists of case studies of branding practices in specific industries or companies, some in specific countries. The majority of research documents the conditions for the emergence of brands and their reception by consumers. Of special note, entrepreneurship and the role of technology in standardising production and communication were major drivers of important early brands. And the history of modern brands is dependent on the history of trademarks. As such, brand identity protection has been a popular focus of scholarship which tries to determine where trademark protection originated. The candidates are America, Britain, France, and Spain.

**Table 2: Case Studies of Branding History**

<b>Time Period</b>	<b>Industry / Region</b>	<b>Issues / Influences</b>	<b>Source</b>
1890 – 1940	Motion Picture	movie stars, stories, ‘shelf’ life, brand extensions	Bakker (2001)
1800 – 1880	Alcohol	role of supply chain institutions, channel management	Duguid (2003)
18 <sup>th</sup> – 20 <sup>th</sup> C	Sports	entrepreneurship, technology, names, rule-making, equipment	Hardy et al (2012)
1880 – 1920	Food	entrepreneurship, technology, communication, ‘alchemy’	Lonier (2010)
1890 – 1940	Beverage (Cola)	brand identity protection, logos, packaging, legal challenges	Petty (2012b)
1890 – 1940	Food	product innovation, product range, chain stores, cooperatives	Van den Eeckhout & Scholliers (2012)
18 <sup>th</sup> – 20 <sup>th</sup> C	Food, plateware, retailing, cosmetics, computers	entrepreneurship, understanding customers & markets	Koehn (2001)
20 <sup>th</sup> C	Food, beverages, fashion	entrepreneurship, advertising, globalization	da Silva Lopes & Casson (2007)
1850 – 1946	Paper & textiles /	brand identity protection,	Saiz & Perez

	Spain	legislation, trademark applications	(2012)
19 <sup>th</sup> – 20 <sup>th</sup> C	Textile & Metal fabrication / Britain	brand protection, International, intellectual property, institutional solutions	Higgins (2012)
1870 – 1929	Britain	brand protection, negotiation, lobbying, collaboration	da Silva Lopes & Casson (2012)
19 <sup>th</sup> C	France	brand protection, international, intellectual property law, copyright law, diplomacy	Duguid (2009)
960 – 20 <sup>th</sup> C	China	social function of branding, consumer culture	Eckhardt & Bengtsson (2010)

Another major theme in the product history literature concerns innovation and product development. Church (1999) presents a balanced evaluation of competing stage theories, focusing on one in particular (Leiss *et al.*, 1986) that highlights the mediating role of advertisers in the relationship between consumers and products. He suggests that the Leiss *et al* theory of consumers' changing perceptions of products over time holds seminal implications for studying the process by which products are developed, that is, whether as innovations through changing technology or changing production processes.

In empirical work, Church and Clark (2001, 2003) have produced case studies of three British consumer packaged goods companies (Colman's, Reckitt's, and Lever Brothers) from the period 1870-1914. In the first study, they conclude that product innovation enabled these firms to become leaders in their respective industries. Further, the process of innovation was gradual rather than revolutionary. A follow-up study (Church & Clarke, 2003) examined product diversification decisions by the firms and found that all increasingly used formalised strategies carried out by new product committees relying on market research.

Other exemplary explorations of product innovation and development include Speikermann's (2009) study of cultural context and consumers' perceptions of product innovation in the German food industry, Berg's (2002) study of the process of imitation and product innovation in the marketing of luxury goods, and Denegri-Knott and Tadjewski's (2010) account of the unintended commercialisation of MP3 technology as a consumer product.

One last subset of research in this domain examines packaging. This is a small body of work conducted mostly by one scholar. Twede's (1997, 2002, 2012) programme of published work on the history of packaging has broadened from a specific brand (Uneda Biscuit), to a single category of packaging (commercial amphoras), to a range of different types of packaging (paper cartons, cans, bottles). In each study, she focuses on the technical innovation and functional benefits each form of packaging provided as part of marketing strategy. The Uneda Biscuit paperboard box (Twede, 1997) is an icon of early consumer packaged goods marketing and symbolised the slow shift to self-service retailing in the early twentieth century. Commercial amphorae were large ceramic containers used from 1500 BC to 500 AD to ship wine and other products throughout the Mediterranean (Twede, 2002). Twede's (2012) most ambitious study to date explores three innovations in packaging as part of the broader context of food marketing. During the period 1879-1903, mechanised processes were developed for manufacturing paperboard cartons, tinplate cans, and glass bottles – all of which revolutionised the marketing of food and beverages in America.

## *Retailing and Channels History*

As with advertising history, our Table 1 indicates large numbers of publications in the field of retailing history, especially during the last couple of decades. In her recent review of the work on retail history, Deutsch (2010) notes that it has “traditionally been an area that attracted interest from across the academy... characterized by work that emerges from a variety of sub-disciplines and disciplines” (p.130). Both advertising and retailing have been studied intensively by business historians and, in the case of retailing, also by historians of labor, gender, race, social movements, and even political economy. However, whereas their research in advertising history often focused on consumer culture and the development of the American mass market, topics that resonate with marketing scholars, much of the research by business historians on retailing is further afield. Earlier work included book-length histories of large, individual retail stores and biographies (see Becker and Larson, 1987 for a bibliography) of their founders which, taken together, provided a well-rounded view of large scale retailing through much of the 20<sup>th</sup> century. We focus here on a sample of more recent research on retailing history that deals somewhat more narrowly with marketing management issues (see Table 7).

Several popular themes in this work have been identified in recent reviews of the literature. Deutsch (2010) points to the importance of social power relations and local context, small business retailers, and the study of pre-20<sup>th</sup> century retailing. Her call for more work on small business retailers and earlier eras was answered, in part, in a special issue of the *Journal of Historical Research in Marketing (JHRM)* on “Retailing Beyond the Shop: Britain c. 1400 – 1900”. Stobart’s (2010) review of the literature highlights studies of the history of shopping that focus on the relationship between retailers and consumers and on the relationship between “modern” retailing and the emergence of consumer culture. Alexander (2010) also suggests an increase in interest in retail supply chains including the wholesale sector (Kitchell, 1995; Boothman, 2009; Mittelstaedt and Stassen, 1994; Ortiz-Buonofina, 1987), innovation in retailing and the role of consumers in the innovation process (Alexander et al, 2009; Cochoy, 2009; Mitchell, 2010; Coles, 1999). As indicated in Table 7, these are some of the issues addressed in more recent research on retailing history.

Compared with research published through the early 1980s, we are seeing fewer biographies and studies of individual firms, and more work that looks at retailing across firms in specific industries (Beckman, 2011; Mittelstaedt and Stassen, 1994; Smith, 2002; Toplis, 2010), especially in the food industry (Basil, 2012; Boothman, 2011; Phillips et al, 2005; Kumcu and Kumcu, 1987). Britain and the U.S. have long dominated studies of retailing history that cross industries at a national level, and that is still true (see, for example, volumes 2.1 and 2.3 special issues of *JHRM*). However, more research is being published on retailing in different countries including Mexico (Bunker, 2010), Canada (Monod, 1996; Boothman,

2009; Basil, 2012), Germany (Coles, 1999; Logemann, 2013), Ireland (Walsh, 2014), France (Dixon, 1994), Japan (Kitchell, 1995), and even Turkey (Kumcu and Kumcu, 1987) and Guatemala (Ortiz-Buonofina, 1987). There seems to be a declining interest in department stores and chains and much more interest in small shop retailing as well as some in non-store retailing (Mitchell, 2010; Miller, 2011).

## **History of Marketing Thought and Practice**

The history of marketing thought is concerned with the production, diffusion and affirmation of marketing ideas, concepts, eras, as well as the establishment of schools of thought and institution building. Exemplar studies have charted the relationship between economics and various strands of marketing thought (e.g. Dixon, 1981, 1990, 1999, 2002), the changing definitions of marketing (Lichtenthal & Beik, 1984) and the turn away from macro-conceptualisations of marketing to micro-level definitions and the implications of this for research and practice (Wilkie & Moore, 2003, 2006).

A number of explorations of the history of marketing management and strategy as well as key concepts like the marketing mix, pricing theory, product life cycle, and SWOT analysis have been made (Bauer & Auer-Srnka, 2012; Madsen & Pedersen, 2013; Shaw, 2012). In addition, the literature has witnessed major challenges to received wisdom. Scholars have argued that aspects of the seminal contributions of Bartels (1988) are problematic. For some, this a methodological issue, focusing on his periodisation of marketing into decades (e.g. Hollander *et al.*, 2005). For others, it is the pinpointing of the first use of the term marketing – an issue central to our disciplinary identity – that is troubling.

Bartels famously positioned the first usage of the term ‘marketing’ ‘as a noun’ ‘between 1906 and 1911’ (Bartels, 1988, p. 3). This has been revised to 1897 by Brussiere (2000), to 1887 by Tamilia (2009), whereas Dixon (2002) and Shaw (1995) move beyond the academic literature and refer to the usage of the term in the sixteenth century. Beyond such nuanced explorations excellent historical surveys of the development of marketing management (Usui, 2008) and the key schools of marketing thought (functions, commodities, institutional, marketing management, marketing systems, consumer behaviour, macromarketing, exchange, and marketing history) are now available (Powers, 2012; Shaw & Jones, 2005).

But, it is the criticism levelled at key concepts which make this area of historical scholarship one of the most interesting for non-historians. These include critiques of the marketing concept (e.g. Fullerton, 1988; Hollander, 1985; Jones & Richardson, 2007) and relationship marketing (e.g. Tadajewski, 2008, 2009; Tadajewski & Saren, 2008). The idea that practices now associated with the marketing concept were only discussed in the 1950s has been seriously contested, with scholars documenting the existence of related ideas such as the pursuit of profit rather than sales and a focus on the customer, from the eighteenth century (Fullerton, 1988) and accelerating markedly in terms of documentary evidence through the nineteenth (Jones & Richardson, 2007) and into the twentieth century (Tadajewski, 2009).

Challenges have been levelled at the existence of certain eras. An exemplar is Fullerton’s (1988) critique of the production era. It has even been claimed that Pillsbury, the

company that Keith (1960) and generations of subsequent academics have upheld as a beacon of marketing practice, was not necessarily as customer oriented as was claimed. Evidence indicates that they were involved with attempts to control the market and thereby disadvantage the ultimate customer (Tadajewski, 2010). What this means is that we should be attentive to the mobilisation and use of certain categories or concepts and ask questions about why they appear at certain times, that is, scrutinise the ideological function of these concepts and the way they are intended to legitimate certain industries or organisations (Marchand, 1985, 2001) or redirect critical attention (Schwarzkopf, 2011a). Most commonly, this is achieved through recourse to some notion of service to the consumer (e.g. Rappaport, 1996) or the democratic workings of the marketplace (e.g. Dixon, 1992; Schwarzkopf, 2011b; Trentmann, 2009). For critical commentators, the promotion of the marketing concept is representative of an attempt to elide the structurally unequal relationship between consumers and the business community (e.g. Benton, 1987; Firat, 2014). Indeed, such accounts are important in encouraging us to register that consumer needs are not necessarily the driving force for corporate activities irrespective of claims otherwise (Dholakia, 2012).

Issues of power relations, then, permeate the historical literature on the growth of the market and the patterning of consumption (e.g. Clarke, 2003, 2007). These readings can be more affirmative, stressing the role of marketing and advertising research in giving the consumer a voice in organisational decision-making. And they can be less positive, stressing the production of consumer desire, the selling of the consumer to advertisers (e.g. Miller & Rose, 1997), the co-optation of political programmes and messages to promote goods and services (e.g. Howard, 2010; cf. Maclaran, 2012; Scott, 2000) and the pursuit of sales irrespective of the benefit or harm to the ultimate consumer (e.g. Clark, 2003).

The idea that all customers were not necessarily the centre of the business universe has been validated by studies that documented the influence of racism, colonialism and ‘civilising mission’ type narratives in marketing practice (e.g. Domosh, 2006; McClintock, 1995). These studies trace the presence of race and racist based assumptions permeating advertising and promotional materials during the latter half of the nineteenth century which represented those from outside of the United States and England in fairly unfavourable terms. But, it was not just marketing communications that bore the hallmarks of ‘scientific racism’ (Tadajewski, 2012), ‘commodity racism’ (McClintock, 1995) or ‘flexible racism’ (Domosh, 2006), the research reports compiled by influential organisations in the U.S. were inflected by similar assumptions. It is these which add a new – and troubling – dimension to the invocation of the phrase ‘the customer is king’. For many within our discipline this is an axiological principle. It is repeated in textbooks. In his recent study of the emergence of market research and the contributions of Charles Coolidge Parlin – the figure most frequently linked to the above turn of phrase – Ward (2009) says that when we pay attention to the way it is used in the research reports of the Curtis Publishing Company, not everyone was a candidate for sovereignty (cf. Trentmann, 2009, p. 115). As he puts it,

‘...market research created for American businesses a working image of the American consumer...In defining certain groups as consumption leaders, as some demographic characteristics...[as] more desirable than others...[the] Curtis Publishing Company codified a view that reflected the cultural values of its mostly middle- and upper-class white employees. The consumer was indeed king, as Parlin argued over and over in speeches, articles, and reports in the early twentieth century, but often only the white consumer, only the native-born consumer, and only the non-Southern consumer.’

The above cited studies – Ward (2009), Domosh (2006) and McClintock (1995) – should remind us that while much historical research aims to document how early practitioners were more sophisticated than they are given credit for, there is in equal measure a more troubling side to the development of marketing than is found in our textbook presentations of the subject. The discipline often refracts and reflects wider biases in society, whether these are racist in tone or ethnocentric. Put differently, attempts to revise the intellectual history of marketing thought both reveals indications of practitioner enlightenment – the ethical orientations of early scholars and companies, for instance – and the problematic assumptions and practices brought into play at the same time.

As Friedman (1998) points out in his history of sales practice, there were some companies operating during the late nineteenth century that were extremely competitive and violated ethical norms such as the Golden Rule. Moreover, they were not catering to the customer, but trying to cultivate fear to ensure they purchased the company's products or services. The example he uses is the National Cash Register Company (NCR) whose tactics included 'pressuring prospects', 'forcing competitors to fail' and related dubious approaches. Despite ideas associated with the marketing concept being in circulation at the same time (Jones & Richardson, 2007), NCR's business behaviour was not consistent with a marketing orientation, nor viewed in positive terms by the U.S. government following the enactment of antitrust laws in 1890 (see Dickson & Wells, 2001). Related studies that emphasise how some business practitioners were engaged in collusion whilst others pursued a more customer oriented approach can be found in the work of Fitzgerald (2000, 2005) who has studied the development of the confectionary business.

### ***Key Institutions and Intellectual Conduits***

There has been a great deal of interest in charting the impact of key institutions on the development of marketing theory, thought, pedagogy and practice. Jones and Monieson (1990), for example, have argued that early marketing thought is indebted to the worldview associated with the German Historical School (GHS). The work of scholars associated with this thought community is some distance from the neoclassical, functional vision of marketing promoted successfully by the Harvard Business School (e.g. Jones, 1992, p. 129).

Underpinning the GHS was an axiology that entailed scholarly commitment to marketplace efficiency and distributive justice. By distributive justice, these scholars meant to direct attention to what was called 'the marketing problem' namely that the price farmers received for their products was often far less, and unjustifiably so, than the price the ultimate consumer paid (Jones, 1994; Jones & Monieson, 1987). While there was much merit in this ethical orientation, it was ultimately overtaken by more business-focused scholarship which was interested in understanding the consumer and their needs, wants and desires, rather than taking a macro-structural orientation in unravelling issues of equity and efficiency. In spite of this, the macro-orientation of this school is considered a progenitor of macromarketing given the focus of the latter on the impact of marketing on society.

The growth of marketing as an intellectual discipline has been the focus of a considerable amount of research. The mechanisms that enabled this such as the founding of the earliest journals including the *American Marketing Journal* and *National Marketing Review* have been examined and the contents of early volumes discussed in detail (see also

Jones, 1992). These two journals combined to form the *Journal of Marketing* in the mid-1930s (Witkowski, 2010). A stimulus for much of the intellectual growth of the discipline has been the American Marketing Association (AMA). The organisation itself has been the focus of sociologically rich research from Franck Cochoy (1998). Cochoy has been extremely active in the last few years, writing about the development of marketing thought from an Actor-Network-Theory approach. At its most basic, this means he takes the ideas and concepts circulated by a variety of stakeholders extremely seriously, charting how they attempt to influence and direct the workings of the economy (Cochoy, 1998), retailing practice (Cochoy, 2010a, 2010b) or marketing research and pedagogy (Cochoy, 1998, 2014), albeit in a non-deterministic fashion. As Cochoy points out, in the social world there are many actors all competing to shape the view of reality that becomes preeminent, and this means that their articulations can cancel each other out, affect the others in unpredictable ways, and so forth.

In two fascinating articles, Cochoy (1998, 2014) explores how marketing as an intellectual discipline has been enrolled in attempts to perform the economic system. He illuminates this proposition by showing how early scholars were active in describing and trying to trace the networks and bottlenecks of the marketing system both out of scholarly interest and in order to make it more efficient. To be able to do this effectively required a number of ‘conditions of possibility’: scholars needed to come into contact with each other and they needed mechanisms that enabled them to communicate and publish. Arch Shaw and his journal *System* was important in fostering such conversations; the AMA more so. Cochoy traces the AMA’s role in facilitating the construction of terminological dictionaries that perpetuated a shared lexicon. With a shared language, research could progress faster and more effectively (see also Kerin, 1996; Witkowski, 2010; cf. Firat, 2014; Sherry, 2014).

Above and beyond these contributions, there have been considerable efforts to flesh out turning points in the development of marketing thought. These include the migration of scholars from Europe (before, during and after World War II). This had major ramifications for the intellectual vitality of consumer research (Kassarjian, 1994), with the period following World War II especially vibrant. It was a point in the history of the discipline when logical empiricist and behavioural scientific approaches, approaches that remain extremely influential today (Belk, 2014; Firat, 2014; Sherry, 2014), were institutionally affirmed. What is notable is the extent to which this was not a function of the determination by scholars that such approaches to developing knowledge were necessarily the best means to advance marketing thought, but contingent upon wider changes taking place in society such as the growth of the Cold War and the pernicious influence of McCarthyism on the academy (Tadajewski, 2006).

Notwithstanding the politics of the period, it was an expansionist time for marketing scholarship, witnessing the emergence of the Marketing Science Institute (Bloom, 1987), the establishment of the Association for Consumer Research (late 1960s) (Belk, 2014; Cohen, 1995; Kernan, 1995a; Sherry, 2014), the founding of *Marketing Science* (Morrison, 2001), the *Journal of Macromarketing* (Hunt, 2011b), the *Journal of Consumer Research* (Frank, 1995; Kernan, 1995b), and *Psychology & Marketing* (Shabbir *et al.*, 2011). While much of this research has focused on the outputs of academics or academic associations and engaged with the main publishing outlets, there were other training providers and publishing opportunities for sales and marketing practitioners.

## ***Non-University Sources of Instruction, Publishing Mechanisms and Professional Associations***

Non-university forms of instruction have very recently garnered attention from historians. Witkowski (2011), for instance, explored the role played by early salesmanship texts on the enculturation of migrants to the U.S. Tadajewski (2011, 2012) has investigated the role of correspondence schools in educating those unable to access more elite forms of higher education, focusing on the Sheldon School (Tadajewski, 2011) and the Blackford correspondence courses (Tadajewski, 2012). Given space limitations we will focus on the former. Sheldon was a major contributor to the training of marketing and sales practitioners throughout the early twentieth century. Whilst he is now a largely forgotten figure, he was influential in terms of his pedagogic role and textbook publishing; he also made contributions to theory. Specifically, Sheldon advocated an ethically oriented sales practice and made a case that the AIDA (awareness, interest, desire, action) model of marketing communication should be extended. In a refrain that sounds like contemporary relational perspectives, Sheldon averred that it should not be assumed that stimulating ‘action’ was the end-point of marketing endeavour. Rather, the end of the process was the creation of a satisfied customer; a customer who would return to the company again. This was his vision of ‘business building’ and it involved the creation of long-term business-customer relationships.

Walker and Child (1979), by contrast, direct our attention from the U.S. to the U.K. context. They unravel the role of sales management associations in fostering a professional ethos among practitioners, focusing on the Sales Managers Association. This was founded in 1911 by an American, E.S. Daniells (Walker & Child, 1979, p. 29). They elucidate the activities of the institution, the journal it published, and the commitment that members of the association espoused to ethically-oriented marketing and sales activities. Importantly, Walker and Child’s analysis complements that offered by Jones and Monieson (1990) and Jones (1992) by noting some of the earliest courses in marketing instruction in the U.K. It also provides information on domestic and internationally oriented marketing courses. As such, it is worth reading in conjunction with the university oriented sister studies that mapped the emergence of international marketing in the first decade of the twentieth century at the University of California delivered by Simon Litman (Cunningham & Jones, 1997) and the ‘foreign marketing’ course offered at Queen’s University in Canada taught by W.C. Clark (Jones, 1992).

### ***Intellectual Currents in Marketing Thought***

Moving from the macro-structuring effects of institutions, there have been a number of prominent intellectual currents that have received attention. These include the debates around the broadening of marketing from its traditional for-profit base into non-profit uses. Kotler (2005) has explained why he and Levy considered the broadening of the domain to be important and valuable. This revolved around the needs of practitioners, the potential for theory and conceptual development by exposing marketing tools and assumptions to new contexts, and because it would help legitimise marketing in the face of criticism that was widespread during the turbulent 1960s.

Connected to the broadening debates, an important paper by Arnold and Fisher (1996) has reviewed the philosophical and conceptual reflections that took place in the 1960s and 1970s. Parts of their study, especially the element dealing with the social

marketing and reconstructionist communities, have attracted further historical attention. Andreassen (1994, 2003) studies the history of social marketing, offering a fairly traditional account by tracing it back to the 1950s. Stole (2013), by contrast, takes the genealogy of social marketing back to the First World War (Hollander, 1985), subsequently documenting a major campaign undertaken by the Advertising Council during World War II (Stole, 2013). The reconstructionist movement – a movement that sought to rethink the discipline at the philosophical level, often through recourse to the work of the radical humanist, Erich Fromm – has, in turn, been linked to the history of critical marketing studies (Tadajewski, 2010).

The variety of interconnected threads that led to the emergence of macromarketing (e.g. Nason, 2011) and sister perspectives such as Transformative Consumer Research (Mick, 2006) have merited some attention of late (e.g. Mick *et al.*, 2012). These paths lead from the German Historical School and their macro-systems orientation at the start of the twentieth century (Jones & Monieson, 1990), via the decline in interest in this perspective after WWII (Shapiro, 2005), through to the subsequent re-emergence of attempts to interrogate the contribution of marketing to society from the late 1960s (Wilkie & Moore, 2003, 2012). While we cannot go into detail regarding the key contributions and perspectives of this period, the rise of the ecological, ‘conservator’, environmental and green marketing movements must be noted (Shapiro, 2012) as should the associated conceptual debates around consumer well-being (Pancer & Handelman, 2012).

### ***Influential Individuals in Marketing Thought***

From key concepts and institutional structures, we move on to influential individuals. There has been an outpouring of biographical reflection. The most pertinent place for interested scholars to start is with Jones’ (2011) recently published book which contains some reprinted and expanded studies of his biographical research on the early international marketing scholar, Simon Litman (Jones, 2004), the polymath Percival White (Jones & Tadajewski, 2011), the wholesaling scholarly titan, Theodore Beckman (Jones, 2007), the macromarketing scholar David Monieson (Jones *et al.*, 2010) and numerous others.

Stephen Brown has been similarly active. He engages with prominent marketing theorists including Theodore Levitt (Brown, 2004), Philip Kotler (Brown, 2002a), Shelby Hunt, Wroe Alderson (Brown, 2002b) and Morris Holbrook (Brown, 1999) to draw out lessons about academic writing. Related publications provide further literary theoretic contributions to the history of marketing thought (Brown, 2009) and consumer research (Brown & Schau, 2007).

Above and beyond the contributions by Jones (2011) and Brown (2005), autobiographical and biographical reflections have been published on frequent basis. They include marketing historians like Stan Hollander (e.g. Hollander, 2009; Jones & Keep, 2009; Jones *et al.*, 2009; Jones *et al.*, 2009; Nason, 2009), academic-entrepreneurs such as Michael Baker (Baker, 2013), former American Marketing Association Presidents (e.g. Lazer, 2013), major contributors to macromarketing (Shapiro, 2013) and historically important European contributors such as Karl Knies (Fullerton, 1998). Knies was one of the earliest scholars to scrutinise the cultural and economic effects of advertising. He offered an account of advertising as a vehicle of communication which provided information to consumers, thereby helping them save time and enabling product choice (Fullerton, 1998). Of particular importance to readers of the *JMM* is Percival White. White is a credible candidate for the

position of grandfather of marketing management, Kotler and Alderson being contenders for father. White's contributions to market research, methodology and marketing thought are some of the most advanced of the time. In the 1920s he was a prominent consultant, very prolific author, and advocate of the idea that the whole organisation should be oriented around the consumer (Jones & Tadajewski, 2011; Tadajewski & Jones, 2012).

As might be expected there have been major streams of research focusing on the academic, pedagogic and service contributions of Wroe Alderson and Philip Kotler. Alderson's conceptual innovations, interdisciplinary skill and panoramic knowledge mean he attracts a great deal of attention. He has been studied biographically (Beckman, 2007; Shaw *et al.*, 2007; Wooliscroft, 2003; Wooliscroft *et al.*, 2005), using literary theory (Brown, 2002b), and against the backdrop of the Cold War (Tadajewski, 2009). His interest in general theory and role in theorising the links between producers and consumers in a systems-analytic, functionalist framework (the organisational behaviour system) is often noted (Beckman, 2007), as well as his contribution to theorising marketing from a managerial perspective (Shaw *et al.*, 2007). And recently Aldersonian ideas have been compared with those associated with 'service dominant logic'. Juxtaposing Vargo and Lusch's (2004) *Journal of Marketing* paper with Alderson's writing, Wooliscroft has made a compelling case that there is a significant degree of reinvention taking place (Wooliscroft, 2008). Similarly, Alderson's transvection concept continues to have utility for analysing distribution systems today (e.g. Hulthen & Gadde, 2007).

Like Alderson, Kotler's legacy seems assured, in view of the numerous contributions that stress his impact on marketing theory and thought (e.g. Bourassa *et al.*, 2007), as well as pedagogy (e.g. Cunningham, 2003). His influence has not just reverberated through traditionally capitalist economic systems, but even made its presence felt – in a slightly abbreviated format – in the former Soviet Union via his textbook, *Marketing Management* (Fox *et al.*, 2005; Patterson, 2003, p. 209n59).

### ***Female Contributions to Marketing Work and Thought***

One of the most important streams of historical research within the past few years has sought to redress the gender biases deeply embedded in our discipline. Scholars have argued that female consumers were not just the dupes of the marketplace, succumbing to the temptations offered by new retailing vistas or the catalogues that winged their way to the country. Tadajewski and Maclaran (2013), for instance, describe how women from a range of classes owned and operated retail environments or worked in sales related activities from the sixteenth century through to the twentieth century in Europe, Great Britain, and the U.S. On related matters, Witkowski (1999, 2004) elucidates how both genders engaged (to some extent) with house furnishing during the eighteenth and nineteenth centuries. While there were structural pressures limiting the activities that women could undertake in most marketplaces (Craig, 2001; Hoffert, 2008), he underscores that the representation of women as relatively powerless consumers is contradicted by empirical evidence. They were 'active...in shaping consumer culture during the late pre-industrial era' (Witkowski, 1999, p. 112).

The reason why the image of the female consumer as dupe was perpetuated has been attributed to ideology. Belisle (2011) explains how this representation helped shore up male superiority in the household. Rappaport (1996) highlights its use by smaller retailers being buffeted by economic circumstances largely outside of their control. There was a tension in this discourse, however. The female consumer was presented as naïve and gullible, yet also

‘selfish’. Commentators who contributed to these debates were also unwilling to acknowledge the rational motives behind shopping at the visually appealing, comfortable, well-stocked department stores which were comparatively unthreatening (e.g. Rappaport, 1996, p. 61), in the sense that staff were tasked with helping customers, rather than pressuring them into making a purchase.

Recently, the contributions of female practitioners and scholars active in the early twentieth century have been surveyed (Peiss, 1998). Attention has been devoted to female editors of periodicals and magazines (e.g. Gertrude Battles Lane, Martha Van Rensselaer). Articles have noted female owners and operators of advertising agencies (e.g. Helen Resor, Caroline Robinson Jones) (Davies, 2013; Scanlon, 1995, 2013). And credit has been given to advertising creatives and copy-writers not just for their creative virtuosity (Scanlon, 2013), but for their valuable role as critics of the industry (Tadajewski, 2013).

Beyond the field of periodical editing and advertising work, there were prominent consultants (Graham, 2013), female product designers (Blazczyk, 2008), and many young women working as assistants in retail stores for low pay whose roles have been underlined (Benson, 1981). A number of papers have emphasised the disciplinary demands made of female retailing staff, especially the monitoring of their physiology, presentation of self, at the same time as they were ‘encouraged’ to ensure that their (lower) class based forms of distinction<sup>1</sup> did not offend the clientele (Benson, 1981; Reekie, 1991). Such work effectively historicises recent debates on aesthetic and sexualised labour (e.g. Tyler, 2009).

The role of female members of the academy is a burgeoning area (e.g. Mason, 1998, 2000; Parsons, 2013; Zuckerman & Carsky, 1990). The contribution by Zuckerman and Carsky (1990) has been the stimulus for this topic. Foundationally, their work and the papers that followed, has drawn attention to how early female scholars pointed out the desirability of focusing on customer needs far in advance of Keith (1960). And they stressed the importance of product symbolism, making arguments not dissimilar to those accorded seminal status later (e.g. Belk, 1988). In short, their conceptual skill and theoretically sophisticated reviews of large swathes of literature is worthy of note (e.g. Mason, 2000; Tadajewski, 2013). Nonetheless, it is fair to say that this literature is a starting point, indeed rallying call, for future research. There are many female scholars and practitioners whose contributions demand exploration (see Tadajewski, 2013).

### **Marketing, the ‘Consumer Society’ and the Management of Subjectivity**

The history of the rise of the ‘consumer society’, the ‘consumer revolution’ (McKendrick *et al.*, 1982) and the fostering of ‘consumer populations’ has been explained in considerable detail (Featherstone, 1983) in various contexts (e.g. Wu, 2008; Zhao & Belk, 2008). The historical claims for the emergence of ‘consumer societies’ has, even so, been subject to a considerable degree of criticism by historians (e.g. Trentmann, 2004, 2005, 2009) who argue that attaching this label to whole societies during periods such as the eighteenth century (e.g. McKendrick *et al.*, 1982) is questionable in analytic terms when the label was not used or applied at the time. This has not stopped writers claiming to have identified – usually their own – countries as manifesting the attributes associated with this label (e.g. growing levels of market-based consumption across at least the middle classes) before the period McKendrick

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<sup>1</sup> On the disciplinary processes that male and female lower middle class retail workers faced, see Hosgood (1999).

et al claimed the United Kingdom attained this status (for a non-western perspective, see Karababa, 2012; Karababa & Ger, 2010).

Rather than trying to attach the label ‘consumer society’ or its equivalent, it is more satisfactory to simply leave it to one side and focus on the changing patterns of consumption and marketing’s role in fostering new ways of life (Trentmann, 2004, 2005, 2009). Clearly, it is true that some groups such as the nobility, the landed gentry and wealthy business people, have long been able to realise their consumption desires through the marketplace (Rappaport, 1996). Likewise, consumption items have figured prominently in people’s lives since early recorded history (e.g. Rassuli & Hollander, 1986). But, for those of more modest means, the opportunity to satisfy their market-based consumption requirements does date from roughly the seventeenth century, when gradually consumption patterns started to reflect to a combination of artisanal and mass market-provisioning (Belk, 1992; Trentmann, 2009; Witkowski, 1989).

The rising prominence accorded to consumption is tied to the emergence of department stores and the growth of professional advertising and market research agencies (Nevett, 1982). As Strasser (1989) points out, the nineteenth and twentieth centuries witnessed a technological windfall that helped marketers expand their reach, as the means of transportation (railroads, shipping) and communication (telegraph, postal service, telephone), and new media vehicles (Lavin, 1995), eased distribution and sales activities. Much attention has been devoted to explicating how marketing activities were facilitated. The banking industry and accessibility of credit that greased the wheels of capitalism has been studied (Clark, 2007; Dholakia, 2012; Smith, 2010). The sales intermediaries that helped organisations tap their customer base have enjoyed scholarly attention (e.g. Friedman, 2004; Harris, 2008) and contributions have identified the ways in which the activities of sales people were disciplined, so that they were consistent with organisational objectives (e.g. Fougere & Skalen, 2013; Hosgood, 2009).

The impact of advertising has attracted attention from across the paradigmatic spectrum. Neo-Marxist accounts with their interest in power relations gravitate towards the industry (e.g. Ewen, 1978). And while contemporary critics have bemoaned the expansion of marketing communications into public space (e.g. Klein, 2000), it seems clear that this is a longstanding problem. Certainly what is now known about the promotional saturation witnessed in the UK during the eighteenth and nineteenth centuries (McFall, 2002, 2004a, 2004b) reminds us that advertising has been a feature of the urban and countryside landscape for a long time.

Nonetheless, the nineteenth century did see the spectacularisation of the retailing landscape (e.g. Leach, 1984, 1993). Connected to this, scholars have situated the rise of large scale retailing against the backdrop of the arcades of Europe and the Grand Expositions (Parker, 2003; Rappaport, 1996). While studying the visually impressive Wanamaker stores (U.S.) or the Bon Marche (Paris, France) is a treat in and of itself, scholars have used these institutions to make theoretical and conceptual contributions. Often these relate to issues of consumer agency, processes of seduction, the creation of a ‘desiring gaze’ (Rappaport, 1996), and the different types of value that people derive from their engagement with the world of consumption such as use, exchange and symbolic values (e.g. Ewen, 1976; Featherstone, 1991; Klein, 1980; Laermans, 1993; Parker, 2003). Parker (2003), for example, asserts that large retailers traded in symbolic currency, thereby rethinking related debates in postmodern scholarship by over a century (cf. Trentmann, 2009, p. 112). Tadajewski (2008), by contrast, provides a close reading of Wanamaker’s writings, advertisements and biographical accounts,

to make a case that he engages in similar practices to those now conceptualised as relationship marketing.

From more institutional and meso-level analyses, it is appropriate that we now focus on micro-level concerns. As readers will no doubt be aware, much attention has been given recently to the concept of the working consumer (Cova & Dalli, 2009), the implications of 'consumer generated content' (Muniz & Schau, 2011) and the management of brand communities (Muniz & O'Guinn, 2001). These topics stimulate attention because they indicate how consumer practices can be a source of creative inspiration and profit generation for companies. In equal measure, what these debates index is a greater appreciation for the management, control and profit potential from consumer subjectivity and imagination (Brown *et al.*, 2003; Cova & Dalli, 2009; Firat, 2014).

While these ideas are salient in an era of internet enabled communication, we should not assume that an interest in the management of subjectivity is a recent form of marketing intervention. Marketing, after all, is one of the 'modes by which, in our culture, human beings are made subjects' (Foucault, 1982, p. 777). Indeed, historians have highlighted how subjectivation processes are inherent in the production and affirmation of a world in which consumer goods are the motor of economic vitality and the index of social success (Ewen, 1976). Investigations of these issues can be found in Susan Strasser's (1989) *Satisfaction Guaranteed* in which she details the emergence of the mass market in the United States. For Strasser, the period between the late eighteenth and early nineteenth century saw the widespread conceptualisation of the market as a malleable entity. Domosh (2006) makes a complementary argument, suggesting that the same period saw the characterisation of the consumer as malleable (see also Rappaport, 1996; Trentmann, 2009). These ideas about malleability can be tracked through various strands of literature. Most explicitly these assumptions drove corporate advertising communications (Domosh, 2006; Leiss *et al.*, 1985; Lynd, 1936; Miller & Rose, 1997; Pollay, 1986; Strasser, 1989; Tadajewski, 2013), the activities of department stores (Laermans, 1993), the types of consumption and leisure activities promoted by employers (Goldman & Wilson, 1977; Hosgood, 1999), and the advertising supported soap operas produced and circulated via mass market mediums like the radio (Lavin, 1995).

Domosh (2006), for example, describes how large international organisations like Singer, the sewing machine company, sought to promote their products to consumers in international markets as part of a wider 'civilising' process that aimed to bring the benefits of the industrial knowledge developed in the U.S. to those whose industrial and consumption practices lagged behind. In equal measure, Heinz, the food producer, wanted to transform the subjectivity of both their American and international audiences, trying to mould them to understand themselves as consumers of packaged food items, not as producers of similar food themselves.

### **Socialist Marketing and Advertising Practice**

In the literature there has been increased attention on the Second World War and the Cold War in shaping a consumerist worldview, particularly in Germany (Castillo, 2005; Veenis, 2011) and Yugoslavia (Patterson, 2003). These processes were frequently contested (e.g. Reid, 2009). What is fascinating about such work is how they juxtapose the role of marketing in America versus perceptions and practices in socialist countries. In the latter, the stress is on product functionality, catering to appropriate (ideologically congruent) needs rather than stimulating consumer desire, and the function of advertising (and shop assistants) was simply

to provide information in place of the role it performed in the United States in stimulating demand (e.g. Crowley, 2000; Ibroscheva, 2012; Patterson, 2003; Reid, 2002; Veenis, 2011).

### **Retail Practice and Consumer Behaviour**

In a series of papers that examine an under-utilised periodical, *Progressive Grocer*, Franck Cochoy has provided some of the most theoretically innovative contributions in recent years. *Progressive Grocer* was distributed free to small retailers and funded wholly by advertising revenues. Cochoy's analyses all explore the contents from the late 1920s until the 1950s and are contributions to an 'archaeology of the present times' (2010a). What this neat phrase entails is recognition of the 'distributed agency' of all potential actors (including writers, publishers, material objects, as well as consumers) that helped constitute markets. In methodological terms, this means paying attention to 'what is shown besides what is said' (Cochoy, 2010b, p. 33). Cochoy does not thus limit himself to studying only written documents, rather he examines how this trade journal tries to structure future retailing practice by the things it says, but also by the things it shows, and how it demonstrates them.

Commensurate with the 'context of context' debates (e.g. Askegaard & Linnet, 2011), the interest in the spatial structuring of consumer behaviour (e.g. Cook, 2003) and wider examinations of the concept of consumer sovereignty (e.g. Schwarzkopf, 2010), the consumer is displaced from the centre of these analyses. In directing attention to the structures that frame consumer behaviour and retailing practice, Cochoy is deliberately 'provocative'. Echoing Fromm, he claims that consumer practice manifests a degree of herd-like behaviour (Cochoy, 2010b). This provocation is his way of encouraging us to be attentive to the spatial and temporal organisation of the retail environment.

In highlighting how the activities of retailers were shaped by the journal, Cochoy points out it presented an image of progressive business practices that were far removed from actual business methods of the time via pictures of cutting-edge retail stores (Cochoy, 2010b), scale models, and the testimony of grocers themselves (Cochoy, 2010a). By doing so, it attempted to bring new practices into wider usage, most notably self-service.

To begin with, the shift from counter service to self-service did not occur overnight; it was a staggered change. Alternative forms of product presentation were used, including clear presentation cases that allowed the customer to see the product but not actually handle it (Cochoy, 2010a). This reticence by shopkeepers was a reflection of their concern that self-service would lead to greater theft. The customer was not king but a potential thief. Even when self-service was implemented, what Cochoy presses home is that this did not entail greater agency for the customer. Their behaviour was 'channelled' in many different ways:

'On the one hand, the progressive arrangement of self-service performs the liberal utopia of a fluid and free action of economic agents on the market... On the other hand... marketing professionals know well that such a utopia can only succeed through very tight framing and control operations... by means of fluxing tools (conveyor belts), channelling components (rails, gondolas), and control agents (cashiers), or even by means of some interlocked devices that combine these three operations like the turnstiles, magic doors, and checkout counters.'

(Cochoy, 2010b, p. 44)

What unites Cochoy's series of papers on the retail trade is a reflection on the notion of choice. He achieves this by situating the changes taking place in retailing against the historical context of the rise of the chain store and by recognising the constraints that operate

on small retailers and consumers alike. For retailers, the changing environment was fraught with tension. The chain store gained ground and their vision as a retailer was limited in cognitive and spatial terms. They literally were constrained by the demands of their job, since they could not leave the store for a prolonged period. This prevented them from examining their competition for ideas about best practice. They had to rely on a proxy measure, *Progressive Grocer*. This both expands and shapes the vision of what a modern, progressive retail outlet should look like:

‘*Progressive Grocer* presents to him thousands of images and reports on experiences and equipment...*Progressive Grocer* thus leads our grocer to take the vanguard of distribution as the present state of commerce and consequently his own state as the rearguard. Since the poor man worries about the competition and the innovations reported in the journal, he has no other choice, if he wants to remain in the business race and still be worthy of his profession, but to engage his person, his shop, and his clients in this irresistible modernization movement that has apparently already taken hold of much of his fellow grocers.’

(Cochoy, 2011, p. 178)

### **The Future for History?**

The growing number of scholars interested in the history of marketing will, undoubtedly, pursue this research agenda come what may; they have a sense of the research directions they intend to work towards, and we would not want to be so intellectually presumptuous to suggest areas where we think they should channel their energies. What we will do is reprise the argument made at the start of the paper that historical research should be of interest to all marketing scholars.

What we have found interesting during the writing of this manuscript is how scholars from across the paradigmatic spectrum all recognise the importance of history for their research (e.g. Brown *et al.*, 2003; Stern, 1996). For instance, Thompson (1997) stresses the need for phenomenological research to incorporate historical and cultural knowledge when trying to make sense of how people use consumption to craft a sense of identity and place in the modern world. Likewise, Arnould and Thompson (2005) ascribe importance to historical analysis in determining the structures that envelop the consumer, most notably in reference to the literatures subsumed under the labels ‘The Sociohistoric Patterning of Consumption’ and ‘Mass-Mediated Marketplace Ideologies and Consumers’ Interpretive Strategies’ in their literature review.

In their critique of existential phenomenological research, Askegaard and Linnet (2011) remind scholars of the necessity for an awareness of meso- and macro-level influences in shaping the interpretive process. Fleshing this point out, Askegaard and colleagues have illuminated the impact of macro-level factors such as globalisation and ‘modernisation’ on the perceptions and practices of young consumers (e.g. Askegaard *et al.*, 2005; Kjeldgaard & Askegaard, 2006).

Related to consumer culture scholarship, Gopaldas (2013) has argued that marketplace discrimination research needs a core element of historical and ‘genealogical’ research. This is meant to inform the explication of how longstanding processes of discrimination have influenced the disadvantageous subject positions that some people occupy, whilst offering platforms through which others can succeed. Gopaldas’ analysis takes us into the domain of critical marketing studies which seeks to challenge the societal status-quo.

An historical perspective often features in the writings of critical theorists where it is used to question assumptions of progress and the promises offered by Western capitalism (e.g. Honneth, 2004; Murray & Ozanne, 1991). This focus is a reflection of the on-going influence of Karl Marx (1919), particularly his comments in *The Eighteenth Brumaire of Louis Bonaparte*, where he signals the structuring power of history.

For critical theorists, historical study enables us to see how consumer and consumption behaviour is shaped by social structures (e.g. gender, longstanding public policy decisions) and the ultimate hope is that this consciousness raising exercise leads to emancipation.

The final strand of research that places historical analysis central to its endeavours is ethnoconsumerism. In spite of the pioneering work by Venkatesh (1995), there has been minimal development in producing such research. Given the growing awareness about the problems which accompany transferring concepts and theories developed in the West to the rest of the world, we expect that this approach will experience growth in future.

Ethnoconsumerism involves ‘the study of consumption from the point of view of the social group or cultural group that is the subject of study. It examines behavior on the basis of the cultural realities of that group’ (Venkatesh, 1995, p. 27). Different locations have different histories and this influences subsequent patterns of interaction and behaviour. As such, the use of a concept derived from the United States (e.g. materialism) is influenced by the history of the cultural environment in which it was expressed and therefore the meaning of the concept should not be assumed to be stable irrespective of location.

In putting forward a proposal for a ‘culturally based epistemology’ Venkatesh asserts that concepts and theories have to be generated from within the context that is being studied (Meamber & Venkatesh, 2000). This demands immersion in the history of the culture because ‘many aspects of cultural life have developed historically’ (Venkatesh, 1995, p. 29). This reflexivity will be essential in understanding ‘current practices’ (Meamber & Venkatesh, 2000, p. 98) and researchers need to be knowledgeable regarding ‘social histories and memories’, ‘appreciate pertinent historical and socio-economic trends’, and be prepared to undertake archival research to map the ‘historical-socio-cultural themes of the culture embedded in texts, local histories, value systems and archival sources’ (Meamber & Venkatesh, 2000, p. 106).

In view of these developments, we submit that the future for historical research seems bright.

## **Conclusion**