Teaching and studying marketing history: a personal journey

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Abstract

Purpose – The purpose of this paper is to provide insights into the challenges and rewards of engaging in the inextricably intertwined activities of studying and teaching marketing history. The secondary purpose is to encourage marketing scholars to expand work in this area.

Design/methodology/approach – The approach invokes the memoir and that format traces the author personal development in the field of marketing history over 30 years. It discusses what the author learned, how he learned, and how these lessons can be applied.

Findings – The paper offers several findings: marketing history can be part of every marketing course; students should be engaged in the development and application of historical findings; marketing scholars must develop an understanding of historical methods as a means of supporting research and teaching; and marketing history should eventually be seen in marketing as economic history is seen in economics.

Practical implications – The paper puts forth an approach for undertaking historical research in marketing and suggests how to use those findings in teaching marketing history. The emphasis focuses on engaging students with the caveat that history is not predictive. The goal is to put marketing events in their proper context, to understand how they develop and how they play out. Marketing history has its own intrinsic value but also provides a new dimension for decision making.

Originality/value – The paper uses a first person narrative of working in developing a field, a historic device not frequently found in marketing. It also represents a historiography of marketing history.

Keywords Marketing theory, Research work, History, Learning, Teaching

Paper type General review

Introduction

Teaching marketing history was at the same time the most challenging and the most satisfying part of my career. A lifelong interest in history was started by an aunt who showered me with history books long before I understood why history mattered. My interest in marketing history developed from interactions with a number of marketing scholars including Louis P. Bucklin, Delbert Duncan, E.T. Grether, and David A. Revzan, all of the University of California, Berkeley, and Wroe Alderson, Ralph F. Breyer and Reavis Cox, all affiliated with the Wharton School of the University of Pennsylvania. Each of these scholars viewed marketing history differently, none provided directions for undertaking research, but all discussed its importance. To them it was greater than the collection of facts and more than a chronology of events. Their legacy is simply:

• What does the historical record say?
• How can history be used to improve marketing practice and theory?

The purpose of this paper is to discuss how I taught marketing history which as will be seen depended upon first learning how to study marketing history. In all honesty, I never taught a course titled “marketing history” though I developed a prospectus for
such a course. Marketing history was always raised in my courses although it was not until the mid-1980s that I formally introduced the topic as such. There were significant challenges in introducing marketing history into the curriculum. The literature was limited to distribution, it was descriptive rather than analytic and synthetic, and much of the best work was done outside of marketing. There was little interest in teaching marketing history, as opposed to the history of marketing thought, in doctoral programs. Textbooks made little note of historical matters and at best included some retail and wholesale statistics but with rare exception did not acknowledge the history of marketing practices. Those who undertook historical research and teaching did so at their own peril. It was not highly valued in the academy because it was not seen as having the rigor of the behavioral and quantitative disciplines that were reshaping marketing. I recall Stan Shapiro once asking me if I would recommend marketing history as an area for doctoral research (in contrast to the history of marketing thought). My answer was “no” even though years earlier I had taken leave of my senses to engage in marketing history as part of my pursuit for promotion to professor. I am not certain my answer would be different today although there is more acceptance of historical research. Once past the “rite of passage,” I began to work in marketing history, which I define as the history of marketing practices, by studying how historians went about their craft, by engaging in historical research, and finally by integrating history in my teaching. By the way, Ferguson’s (2008) The Ascent of Money: A Financial History of the World is an excellent example of what marketing history might look like.

Scope and scale of historical research and teaching

Becoming a marketing historian requires an appreciation of the scale and scope of historical methods. Much as the single dot in a pointillistic painting has value, its true value is found in its relationship to the whole. Historians focus on the relationships between events in a large context and although there is no agreement about which approach offers the greatest value, they do agree on the need for a comprehensive framework. This is the historical landscape containing the basic elements of form, function, location, and time. The Landscape of History and How Historians Map the Past provides excellent examples for research and teaching marketing history (Gaddis, 2002).

History is a discipline of the senses. The first challenge is to see or visualize the landscape. It contains physical, social, spatial, and temporal elements that form maps. Seeing entails enhanced perception, observation, description, and comparison. Gaddis uses four town plans of Oxford, England from 1250, 1500, 1850, and 1990 drawn from an illustrated history of the university for an introduction (Prest, 1993, pp. xvi-xxi). He urges us to contemplate the enduring pattern of public space originating with “the path taken by oxen making their way from the ford across the Thames or Isis to the one across the Cherwell, and back again” (Gaddis, 2002, p. 131). While the paths are now streets, it is easy to see changes in functions and structures and contemplate what might happen next. The landscape provides direction in organizing the elements and it serves as a prompt for asking questions such as when did they originate, why have they changed, when did they change, and what forces affected them. The second challenge is to hear the voices of the past; some are recorded, some are transcribed and some are transformed into images. Listening and reading requires an appreciation of languages, their changes over time, and the variations among different speakers. The third challenge is tactile, to feel the artifacts,
to see how they were made, and to determine who made them and who used them and how they were used.

Before Gaddis, the best discussion of the issues of scope and scale was found in Braudel’s narratives (Braudel, 1980). Chapter 1 of The Mediterranean and the Mediterranean World in the Age of Philip II is the most engaging and inclusive historical landscape I have come across; he writes about geography, geology, and topography and culminates with the people and their activities (Braudel, 1996). He enshrines the importance of the “human sciences” in history including demography, economics, geography, and sociology (Savitt, 2000). Other historians such as Bloch (1953), Gardiner (1961), Marwick (1970), and Carr (1982), noted in order of their publication, also offer important insights about scale and scope. Each has different views about research methods, analytic and synthetic methods, and the writing of history, but they agree that the landscape is the stage on which history plays.

History focuses on the activities, the episodes, and the incidences of the past, the environment, and the individuals that make it happen. Carr establishes this point when he noted “modern physicists constantly tell us that what they investigate are not facts, but events” (Carr, 1982, p. 9). This ensures a range of experiences beyond an individual or single observation and the experiences of different times, places, and situations improve our understanding of the present. Historical study with its numerous interactive variables differs from traditional marketing research with its guiding theory, structured research methods, and statistical procedures for evaluating results. It is macro rather than micro and it conflicts with marketing’s predisposition to use predictive hypotheses to develop law like statements. Research and teaching are messy, full of conflict, and often without precise conclusions. They demand analysis and synthesis and are clearly not for the fainthearted who are uncomfortable with ambiguity, complexity, and the absence of statistical precision. From a distance, marketing history appears not to have the demands or rigor of quantitative analyses, but that is a false impression that is quickly shattered once research and teaching begins.

Do we know what we think we know?
The starting point for marketing history is the examination of “common knowledge,” those constructs that are the core of the discipline and represent what we teach. Not everything in our textbooks has historical validation and marketing history can help us identify what we think we know and stimulate research to understand what we need to know. As I reviewed books for courses, I compiled a list called “folklore” that is valuable for expanding the scope of marketing history. At the top were “the marketing revolution” and “the wheel of retailing.” Was there ever a marketing revolution? Keith (1960) an executive at Pillsbury, argued in the Journal of Marketing that marketing had gone through “revolutionary” stages. His thesis was that there were four marketing eras – production, sales, marketing and marketing control – and yet except for limited examples from Pillsbury, he provided no evidence. Although marketing historians have rejected this, it still remains a “historical artifact,” most likely because authors have not sought out the historical literature or even worse are not aware of important work in marketing history (Fullerton, 1988; Hollander, 1986; Jones and Richardson, 2007).

Another is the “wheel of retailing.” My first exposure to historical lapses in marketing came in an MBA seminar in 1962 when I was assigned to discover historical evidence to support McNair’s (1958) “wheel of retailing.” My study had serious limitations including a
poor understanding of historical methods, the paucity of information, and my access to firms within the San Francisco Bay area. I concluded that while McNair's proposition was interesting, it did not appear to have a historical basis. Twenty years later I returned to the topic as part of a study of Comet, a British discounter that should have "turned with the wheel." Comet's history showed no evidence of change that approached the constructs in "the wheel." Comet managers thought the idea was "daft" and they gloried in their continuing success (Savitt, 1984). Although seductive, easily teachable, and frequently the focus of academic debates, the wheel of retailing never represented an accurate description of the history of retail change yet it continues to be found in textbooks albeit more in a normative format. As I wrote some 20 years ago, its greatest contribution to marketing was building academic careers including my own; however, not everyone has shared that view (Savitt, 1988; Brown, 1988).

Basic propositions
My experiences teaching marketing history generated four propositions:

1. Marketing history can be included in every marketing course. I began in the core course where it was easy because of my philosophy of teaching marketing as part of systemic management decision making. The first lectures examined the location and consequences of marketing in traditional financial statements. "Cost of goods sold" was the opening for examining the role of marketing decisions. I traced inventory practices that moved that item from a passive analytical variable in accounting and finance in the nineteenth century to an active management variable in the twentieth. I drew on examples from Filene's and Macy's (Filene, 1930; Hower, 1946). The discussions resulted in research that I eventually used in my courses (Savitt, 1992, 1999). If nothing else, students saw the essence of the history of a marketing practice and some idea of the events that caused it. The symbiotic relationship between teaching and research and research and teaching should not go unnoticed.

2. Students must actively participate in marketing history through class discussions, written cases, and term papers. There are limits on what can be expected of undergraduates, but that has been said about every advancement in the marketing curriculum including quantitative methods. Evaluation is difficult since students do not have the background to either criticize historical materials or to develop their own. I used history as a means of encouraging inclusion of diverse ideas that went beyond the "bullet points" in marketing analysis. I became known as "that guy looking backward," however that was a measure of my success! Students began to think about and question the origin of marketing practices. I was careful to note "history does not repeat itself." It does provide an understanding of how we got to where we are and the kind of events that we need to be consciously aware of as we move forward. For the unconvinced, I distributed a copy of "What history can teach managers" from the Financial Times (Owen, 1986).

3. Research methods should be introduced early. I always taught research methods as the second topic in the core course, so it was easy to add historical methods under the heading of qualitative research. I used my 1980 article and Nevett’s, 1991 paper to provide a grain of legitimacy for the study of marketing history (Savitt, 1980; Nevett, 1991). My lectures illustrated different research methods and the
differences between research methods such as case, observation, simulation, and survey, and the statistical methods used to analyze data in the various research methods. I concentrated on the types and sources of information, the differences among primary, secondary, and other sources, and the varieties of data including photographs among others. Handouts illustrated examples of alternative sources and locations of information, such as archives and public record offices, and different classification systems (Savitt, 1983).

(4) Marketing history is learned by reading and writing. Often, specific reading assignments were included in the syllabus. However, getting students to read the textbook was enough of a challenge let alone materials on library reserve. The problem was twofold; students did not believe that going beyond the “textbook package” was necessary, and the general malaise of student literacy. One year, I had the good fortune to have a graduate assistant with an undergraduate degree in history for my core course. His task was to help in improving student writing skills. He knew little about marketing, but he served as a crusader for my objective of introducing historical materials. My expectations were limited and I was pleased when students used history in their assignments. Change comes slowly and the fact that students were willing to accept historical issues indicated that one step on the long process had been taken.

The course that never was
Early retirement arrived before I taught Marketing History, however I did develop a prospectus. Tempting as it was, the plan was not to offer a survey of marketing history. The purposes of the course were to develop a working knowledge of historical methods and to provide an experience in gathering and using historical findings. My reference point was a course I took from the Open University in Great Britain in 1979 where I read about changes in English church architecture after the reformation, studied historical methods, and completed a history of retail changes on an Edinburgh “high street” over a 100 year period.

The course I prepared was designed for a semester of 12 weeks with three hours of class each week. The Introduction, the first three weeks, would develop the landscape and identify themes in marketing history. I concentrated on retail history because of my interests in that area. My mantra was exploration and discovery, searching in time and space, and locating and identifying new knowledge, respectively. That mantra came from the historical work I was doing in the management of polar exploration.

The first reading assignment was my 1989 Journal of Retailing article and although I was not conscious of this use when I wrote it, it contains an introduction to the retail landscape, themes of retail change, and research methods, as well as several examples; it represents exploration (Savitt, 1989). Discovery would come from the study of the history of Sears Roebuck by Emmet and Jeuck (1950). The book is magnificent with its comprehensive picture of Sears. The text provides insights about research methods and offers an excellent analysis and synthesis. I envisaged students discussing the book much as in a doctoral seminar with a series of formal papers.

The first written assignment was a brief history of a nineteenth century Vermont merchant based on his daybooks and diaries, material that I had discovered in the Town Hall of Calais, Vermont during a month long archeological “dig” sponsored by the Vermont Historical Society (Hathaway, 1832). Hathaway was a successful
merchant and kept detailed accounting records and even wrote about how to improve his business by satisfying his customers. Students were to consider what marketing practices he employed, what events influenced his decisions, and what they would need to do to undertake a comprehensive history. The students would experience historical thinking. Except for not having to collect the data which would be on library reserve, the assignment was as real as it could be. They would define the landscape and then go on to assess the vagaries of original information, make sense of the time and place, and write a narrative (Savitt, 1983). This was a run up to the work of the next section of the course which involved first selecting a manageable topic and then outlining an approach to studying that topic. My plan was to have students study local businesses and I had begun contacting several of these businesses to see if they were willing to help. To my pleasure and surprise, a number expressed serious interest.

The research proposal was to be completed in the second three week period. Each student would evaluate a previously published journal length study as a means of identifying the underlying processes of proposal design. Each student proposal was to be comprehensive and define the landscape, themes, research methods, and the sources and location of information. Extensive support for students is critical at this stage and I planned for lectures by colleagues from the history department and arranged for seminars by the business librarian to provide “hands-on” experience with archival, governmental, and photographic collections and with web based resources. At the end of the period, students would present their proposals to class.

The last six weeks of the course were dedicated to research and presentation. My expectations were that students could present a brief but substantial paper. That paper was limited to 20 pages excluding exhibits, figures, and references. At the end of the process, students would share what their research had revealed by making presentations to colleagues, faculty, and those who helped them. Less time was allocated to the writing of history because of its enormous challenge; I simply could not include everything. Good writing comes from reading and I believed the course would provide the requisites for knowing how historical research occurs. That, in turn, would prepare students for critical reading and, hopefully, the more they read the better they would write.

Moving from the prospectus to the syllabus would have required refinement and changes. I would not have abandoned the research exercise although it would have had to be brought in the limits of a term. A reasonable goal for the course might have been the research proposal with an expansion of readings in marketing history. More time evaluating the marketing history literature to better understand methods, processes, and a variety of writing exercises also makes sense but without creating a survey course. The research itself might have been moved on to the next term through an independent study. Other changes would certainly have taken place as the prospectus moved to a syllabus and even more changes would have been forthcoming once the course was taught.

The present as the past
In the early 1980s, I began extensive discussions with several historians and I soon realized I had much to learn about historical research. The methodology in my 1980 Journal of Marketing article was simplistic but it did give credence to the role of marketing history (Savitt, 1980). Its weakness is the methodology. Instead of extending logical positivism as I did, the discussion should have presented historical research methodologies.
Even though fully deserved, there has been less criticism over the years than I expected (Witkowski and Jones, 2006). Ironically, a recent piece on qualitative research offers up the methodology as if it were a Kantian imperative rather than a first effort in proposing methods for historical research (Bousquet, 2005). At the same time, and not unrelated to methodology, I became interested in knowledge management, innovation, and the diffusion of marketing practices, specifically retail inventory management. However, I was unable to spark interest in a historical study and so I abandoned the area.

I became interested in knowledge management and with the renewal of interest in polar exploration in the mid-1990s, I shifted from marketing to the management of polar exploration, an area that had fascinated me since childhood. At the center of the revival was literature on Ernest Shackleton’s ill-fated Antarctic expedition in the _Endurance_ which interestingly focused on “explorers as managers” (Stuster, 1996; Morrell and Capparell, 2001). At the lowest common denominator, there are similarities between retail inventory systems and polar slogging practices. Both actors faced partial ignorance, limited knowledge of the environment, and the challenges of implementing innovations. There were several advantages in studying slogging practices. There were vast amounts of readily available materials in the public domain. Explorers had very large egos and they wrote extensively about their activities in hopes of turning fame into fortune. Although never completely appreciated by polar historians, explorers wrote about their management skills and because of many disasters in the polar world there was no end to the criticism of expedition leaders. Also, there were active explorers who were eager and willing to discuss what they did and how they had learned to manage expeditions. Finally, I was able to garner institutional support by people who appreciated the value of studying management outside of the traditional framework.

I applied “time path analysis” from evolutionary economics, using organizational structure and patterns of innovation, to frame the historical development of slogging methods (Nelson and Winter, 1982). That was only the beginning and the easy part! I had to understand the polar world as seen and known by others. I began with the physical landscape, geography, geology, and ice morphology; I took lessons in using a sextant to appreciate how difficult it was to make one’s way across uncharted landscapes. I spent several days with a master carpenter and Antarctic explorer who was building traditional sledges for a BBC documentary on Shackleton. He taught me a great deal about tacit knowledge and how he learned to interpret the writings of nineteenth century explorers. Locating polar collections was simple but gaining access to them was challenging because they are not found in libraries but in archives, government depositories, and private collections, and gaining access is often complicated. Some materials are held by families or in trusts that require permission for their use and they often have limitations on how much can be used, what can be directly quoted, and sometimes the right to review manuscripts before publication; none required royalties.

The physical handling of materials is daunting because of their age and importance; often they can only be handled with sterile cotton gloves, notes can be made only in pencil, and copying is generally forbidden! The literature includes mythology, biography, poetry (The Rime of the Ancient Mariner), history, and even an econometric study of the differences between public and private expeditions in the Arctic (Karpoff, 2001). Expedition records are massive but they are not always found in a single collection or even in a single country. They include personal narratives, official records such as logs,
investigative hearings, memoirs, journals, fragments of all sorts, and miscellaneous documents including everything from employment records to sales records from ship chandlers to letters between expedition members and their families. In spite of the challenges, I have always found a thrill in handling an original document or artifact. It is the moment when exploration and discovery come together.

More than two years of work went into gathering information and another two years were devoted to developing findings. There are always the nagging questions about the quality, variety, and quantity of the materials — whether there are more of them and where — and there is also the question of their veracity. Validation is difficult; it is a complex process using triangulation and comparison of events through the eyes and ears of many actors. It was easy to trace the development of Norwegian sledge design for which there is an extensive record. That, however, was not the case for Inuit sledging innovations; they were difficult to verify them because they were only reported in secondary sources, many reports reflected European lack of understanding “native peoples” who saw urinating on bone sledge runners as primitive rather than as a rational solution for creating smooth running surfaces!

In this phase, I identified and reviewed the records of 141 polar expeditions, however after almost two years, I could only use 36 expeditions based on the amount of information on sledging. I learned much from those not included and came to appreciate fragmentary information and the challenges in making historical inferences. The study period began with an 1818-1819 British expedition in the Arctic and ended with Shackleton’s 1914-1916 expedition in the Antarctic. The events spoke clearly about the influence of organizations and innovations through time. Formal organizations such as the Royal Navy limited innovative behaviors; they relied heavily on formal doctrine and were intolerant of experimentation. Less formal organizations usually dominated by strong individuals, often scientists, were more innovative (Savitt, 2004). The general history of tacit knowledge in sledging was published in one article and other parts of the work which emphasizes the contributions of individual explorers has begun to emerge (Savitt and Lüdecke, 2007; Savitt, 2008). After completing this latter stage, my goal is to put the materials together in a book length manuscript.

Studying marketing history today
The lessons of the past ten years are relevant to the study of marketing history. Counterfactual analysis, revisiting the past by varying conditions to see if they would produce different results, what I would have done 30 years ago with marketing history if I only knew what I know today is appealing but it is not good history. The overarching lesson is that historical research requires both a substantial, unwavering personal commitment to the work, and the strength not to be seduced by other interesting topics. It is easy to think about history as the past and to move to topics with a different time definition because the historical event will always be there. But doing that diminishes the purpose of historical research and teaching. As with real estate, the starting point is “the landscape, the landscape, and the landscape.” Developing an understanding of the landscape and becoming operational with it takes time and energy and often the rewards do not show up until the work is completed. The need to convince administrators and colleagues about rewarding “work in progress” should not be necessary but it is not realistic to expect that such farsighted changes
will be forthcoming. Good marketing history or good economic history or good history recognizes:

- historical events are in the past and cannot be known as contemporary events are known;
- historical events are unique and unclassifiable;
- history is about actions, statements, and the thoughts of human beings; and
- historical events have irreducible richness and complexity (Gardiner, 1961, p. 34).

What is required is knowing beyond marketing. It is not that the marketing historian must become a savant in each discipline but it is necessary to understand different ideas from disciplines at great intellectual distances and to communicate with the scholars in those fields. This takes time and effort, but ensures quality. It will help to establish credibility for marketing history. Our goal should be the creation of a respected body of work within marketing, and one measure of our success will be that work's value to scholars in other disciplines who begin to use it in their own activities.

A variety of frameworks or models can be used to structure historical studies but the events must always speak for themselves. The models are guides for structuring research rather than the bases for testing ideologies. For example, Marx, the historian, argued that history can best be understood by looking at the production process, meaning that economics is the fundamental factor for studying history and one on which all others are dependent. This is not the same person, Marx the economist, calling for the establishment of socialism (Hobsbawm, 2007, pp. 186-225).

Writing history is a demanding activity; there are many formats and choice depends on the available materials, the importance of events, the actors and their roles, as well as the audiences. Reading both the works and the commentaries of various historians that I have cited is the starting point. Currently, I am trying to master biography; it is a different way of seeing and requires different skills than used in the social sciences (Kendall, 1965).

**Teaching history today and tomorrow**

Teaching marketing history has become easier in the past 20 years as the result of valuable research published in the *Journal of Macromarketing* and in the conference on historical analysis and research in marketing proceedings. With the establishment of the *Journal of Historical Research in Marketing*, there will be even more to draw upon. The quality of output has been increasing but there is still much to do especially in synthesizing past research to establish what we know and what we might study. One goal here would be to equal the level of synthesis now found in the history of marketing thought. There are no mandates for historical research or teaching except that the teaching should be of high quality; a quality that must be built on the quality of the research that precedes it. As we move forward in teaching, we must move toward increasing the amount of research developed from primary sources. This will be one measure of improvement in quality.

An ever increasing level of quality will attract more scholars into historical research and teaching. No special accommodations should be necessary for historical research and teaching; they should be held to the same standards but with recognition that the process of historical research and publication varies from traditional practices.
Scholars of marketing history must assert its uniqueness to the discipline much as the case of economic history vis-a-vis economics. Teaching marketing history requires a belief that it should be done and that it is an essential element of marketing’s integrity.

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