Historical Research in Marketing: Retrospect and Prospect

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The history of historical research in marketing is reviewed as background to an examination of the state of the art. We focus on the major current contributors to historical research in marketing, their recent works, and opinions about future prospects for this field.

INTRODUCTION

In 1976 E.T. Grether examined four decades of publication in the *Journal of Marketing* dividing the literature into twelve categories, one of which was “historical.” At that point in time as a percent of articles published, historical research in marketing represented the category of lowest relative interest. Furthermore, Grether’s analysis pointed out the fairly consistent decline in interest (and hence publication) since the late 1940s. Of course, the *Journal of Marketing* was not the only outlet for historical research in marketing, although few would disagree with Grether that it has “played an integral role in the development of marketing as a discipline” (1976, p.63). Even fewer could have predicted the explosion of activity in this field during the 1980s. Indeed, the quantity and quality of historical research in marketing is now such that a review of this work would be useful.

The purpose of this article is to review historical research in marketing. The editors of the first Marketing History Conference Proceedings expressed the need for “amplification, synthesis, and promotion” (Hollander and Savitt 1983, p. v) of the substantially growing literature in marketing history. This article attempts to address that need. We begin with a history of the history, so to speak, focus on recent activity in the field, and then speculate on its future directions.

CLASSIFICATION OF THE LITERATURE

For the purposes of this paper historical research in marketing refers to research which deals with marketing exclusively or almost exclusively from an historical perspective as well as publications on doing historical research in marketing (e.g., methodological). As Savitt (1980) has pointed out, historical research in *marketing* includes marketing content (the activities, practices, and processes of marketing) as well as marketing thought (the ideas about marketing content). In either case, historical research in marketing is defined by the content of marketing (1980, p. 52). Therefore, any or all events or activities generally understood to be part of marketing (e.g., advertising, marketing research) at the time such research was carried out could be included. Because of space restrictions, however, a few exceptions have been made here.

First, many company and industry histories include much discussion of marketing practice, especially those of retailing institutions (e.g., Hower’s *History of Macy’s of New York, 1858–1919*). However, such histories seldom have as their primary purpose an examination of marketing. Therefore, except for some recent examples from conference proceedings and the periodic literature these have been excluded from this review. Also, although not that recent, Hidy (1970) presented an excellent review of books covering this area. A second (qualified) exception is advertising. Again, a somewhat dated bibliography and review of this area has been published (Pollay 1979). Since then several books on
advertising history have been written, although most by historians outside the marketing discipline (Pollay 1988, p. 195). Therefore, we will restrict our attention here primarily to the advertising history which has appeared more recently in the marketing and marketing-related literature. Finally, the history of consumption (McCracken 1987; Rassuli and Hollander 1986) has also been reviewed very recently. Therefore, these areas will not be given the attention otherwise warranted in a complete review of the history of historical research in marketing.

Again, this review includes research which deals with marketing exclusively or almost exclusively from an historical perspective. An historical perspective involves the description, analysis, or explanation of events through time (Savitt 1980, p. 53); even more so, it involves a thorough, systematic, and sophisticated awareness of change—or lack of it—over time, and of the contexts of place, situation, and time in which change—or continuity—occurs (Fuller on 1987, p. 98). That perspective characterizes most of the research reviewed here. In some instances it was difficult to assess the extent to which a publication dealt with change or explained events through time since they essentially described marketing at some point in history (rather than through time) and only implicitly compared to some other era.

Again, however, an exception is noteworthy. A good deal of the earliest research by marketing scholars in this century, for example, Nystrom’s (1915) The Economics of Retailing followed an historical perspective. However, since this research appeared before there were well recognized traditions of business and marketing history, and has been reviewed elsewhere (Jones 1987; Jones and Monieson 1990) it has also been excluded from this survey.

Our search included all of the major marketing journals, business and economics history periodicals, a computerized bibliographic search, and a survey of participants at the first three Marketing History Conferences. This produced a bibliography of 318 publications including 172 conference proceedings, 101 journal articles, 26 articles in books of readings, and 19 books, not including the exceptions mentioned above. It was a thorough, but not exhaustive, review of the literature. Without the relatively narrow definition of historical research in marketing given above we undoubtedly could have added to this list. Nevertheless, we believe our more restricted set accurately represents the mainstream of historical research in marketing.

Three broad categories of research were identified including the two suggested by Savitt (1980)—“history of marketing thought” and “history of marketing content”. To this we added a third category represented by Savitt’s article cited above—“methodology.” Further, a variety of subcategories were developed to produce the classification shown in the Table. Each publication reviewed was classified according to its major thrust. Of course, some of the works dealt with more than one topic and were classified accordingly. We were interested in identifying any patterns or changes over time. Therefore, the number of publications was summed by subcategory for each decade starting with the 1930s. There was no reason to group the literature by decade other than for convenience. Each decade/column indicates the number of publications dealing with each topic or subcategory as well as the relative proportion of total publications for the decade. For example, between 1930 and 1939 one publication (Converse’s (1933) “The First Decade of Marketing Literature”) dealt with “history of marketing thought—literature.” That article represents 17 percent of all publications for the decade.

Admittedly this taxonomy is subjective. We can only echo the sentiment expressed by the editors of the second Marketing History Conference Proceedings, “taxonomy is in the eyes of the [authors] and readers are cordially invited to consider other ways of classifying” (Hollander and Nevett 1985, p. xvii). There is not sufficient space here to adequately define all of the subcategories employed. However, a brief discussion of the ones most heavily represented is useful.

The category “marketing thought—theory/schools of thought” included research which dealt with ideas in their various forms and levels of aggregation—concepts (e.g., marketing management concept), theories (e.g., wheel of retailing), and schools of thought (e.g., functional approach). “Marketing content—activities/functions” included marketing practices such as advertising (the most heavily represented in this category), pricing, and product innovation strategies. While subcategories such as retailing, wholesaling, and market research could certainly be considered as marketing practices they were considered separately in this review.

RETROSPECT

As illustrated in the Table, a steady increase in publication through the 1960s was followed by a sharp drop during the subsequent decade. Thus, Grether’s observation in 1976, cited above, was not surprising. However, an explosion of interest in historical research during the 1980s is evident in the dramatic increase in the number of publications during that decade. Along with the increase in scope there has been a change in the nature of historical research in marketing. Recently there has been a relative shift towards researching the history of marketing practices and writing about historiography. However, there has always been a consistent interest in the history of marketing thought.

Recording the Facts: 1930–1959

From 1930 to 1959 historical research in marketing was dominated by interest in the development of marketing thought. The earliest example reviewed for this study was Converse’s (1933) “The First Decade of Marketing Literature” published in the NATMA Bulletin. During this period attention was focused on tracing the earliest literature (Applebaum 1947; 1952; Bartels 1951; Converse 1945; Coolen 1947; Maynard 1951) and the teaching of marketing (Bartels 1951; Hagerty 1936; Hardy 1954; Litman 1950; Maynard 1941; Weld 1941). A few publications focused on individuals and organizations that pioneered in the development of the discipline (Anew 1941; Bartels 1951; Converse
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1Some publications, especially books, dealt with multiple topics. Totals may differ from 100% due to rounding.

1959b), and a series of biographical sketches published in the Journal of Marketing between 1956 and 1961 was later compiled in book form (Wright and Dimsdale 1974). During the 1950s, however, a trend began towards focusing on the history of major marketing concepts (Breen 1959; Kelley 1956), theories (McGarry 1953), and schools of thought (Brown 1951; Cassels 1936).

There was less historical research done between 1930 and 1959 on marketing content. Most of this focused on the history of retailing and wholesaling (Barger 1955; Jones 1936; Marburg 1951; Nystrom 1951). A more general history of marketing content which was distinctive in its scope of subject matter and historical perspective was Hotchkiss's (1938) Milestones of Marketing. Using the American Marketing Association's definition of marketing to guide his choice of topics Hotchkiss traced "the most important steps in the evolution of marketing" (p. vii) back to ancient Rome and Greece through medieval England to modern North American practices (mostly retailing, advertising, and merchandising). Since the book drew heavily from published sources on economic history one reviewer described it as an "economic history of marketing" (Larson 1938, p. 13).

Barger's (1955) book examined the changing role of wholesale and retail sectors in the American economy from 1869 to 1950. It was a unique statistical study of the cost and output of distribution, and of the relative importance of wholesale and retail sectors as measured by the proportion of the labor force engaged in each.

A history of marketing content which complements the Hotchkiss book by focusing on marketing practices of the twentieth century is Converse's (1959b) Fifty Years of Marketing in Retrospect. This was written as a companion to his (1959a) study of the beginnings of marketing thought. Converse described it as "the story of business and particularly of market distribution as I have seen it and as I have studied it" (p. vi). In addition to marketing practices such as advertising and promotion, pricing, merchandising, and others, Converse describes the changing economic conditions and technological developments which influenced such practices.
Throughout this early period historical research was mostly descriptive as marketers focused on recording the facts of marketing history and the history of marketing thought.

Integration of Practice and Thought: 1960–1968

The 1960s were a transition period for historical research in marketing. A number of significant works and events laid the foundation for the growth in interest evident today. During the early 1960s successive conferences of the American Marketing Association featured tracks on historical research (Greysen 1963; Smith 1964). Most of the papers published from those sessions presented justifications for doing historical research. Four books in succession were published on the history of marketing thought. Converse (1959a) presented a biographical and literature survey of the development of the discipline. Coolsen (1960) described the contributions to marketing thought representative of liberal economics in the late nineteenth century. Essentially, this was an expansion of some of the material in Converse’s book (no surprise, since Converse was part of the committee for Coolsen’s thesis on which the book was based). Two books which complemented each other were Bartels’ (1962) The Development of Marketing Thought, which focused on a chronology of published literature, courses, and events since 1900, and Schwartz’s (1963) Development of Marketing Theory, a summary of the development of major theoretical approaches in the discipline. In fact, historical research on concepts, theories, and schools of thought was the largest subcategory of publication during the 1960s. Other examples include Hollander (1960; 1963a; 1966), Keith (1960), Lazer (1965), and LaLonde and Morrison (1967).

A distinctive quality of some research during the 1960s was the integration of marketing content with marketing thought. Such work went beyond the descriptive character of earlier writings by using the history of marketing practice to analyze the history of marketing thought. An example of this was, and continues to be, Hollander’s work (cited above, and more recently 1986b). His distinctive approach to historical research has recently been explicated by Rassuli (1988). This approach also helped to raise the popularity of historical research on marketing content close to that of marketing thought.

The history of marketing activities or functions emerged as a strong subcategory of marketing content. This included research in advertising and promotion (McKendrick 1960), product innovation (Silk and Stern 1963), and personal selling (Hollander 1963b; 1964). And a broad range of marketing content, especially in corporate/industry and activities/functions, was covered in Shapiro and Doody’s (1968), Readings in the History of American Marketing. Settlement to Civil War.

Shapiro and Doody stated that their objective was to “awaken the interest of students of marketing in history and historical analysis” (1968, p. 12). Judging from the drop in historical research during the early 1970s the book’s impact was not immediate. However, it contributed to the critical mass of historical research in marketing during the 1960s and undoubtedly inspired marketing historians of the 1980s.

Expanding the Scope of Marketing History: 1969–1979

There is no obvious or simple explanation for the paucity of historical research during the 1970s. Indeed, most of the research appeared in conference proceedings and even then, not until the end of the decade. An exception was the second edition of Bartels (1976) The History of Marketing Thought. However, two developments which carried on strongly into the 1980s are noteworthy.

The first was an attempt to push back the history of marketing thought past the turn of the century (Dixon 1978; 1979; 1981; 1982; Lazer 1979). Of course, this carried with it a refocusing of attention beyond North American concepts of marketing to those in other parts of the world.

A second development of the late 1970s was the integration of advertising history into the marketing literature. At that time Pollay observed that there were very few significant sources on advertising history (1979, p. 8) and those had been written outside the advertising discipline. To correct that situation, an ambitious research program for advertising history was detailed, including the justification, research method, and data sources for such work (Pollay 1977; 1978; 1979). The continuation of that program contributed to a stream of research on advertising during the 1980s.

THE STATE OF THE ART

The quantity and quality of historical research in marketing have grown enormously in recent years. Returning to the Table—the 261 topic/publications during the 1980s represent a substantial body of literature. Of course, much of this work is accounted for by the Marketing History Conferences. In 1983 Michigan State University began hosting the Marketing History Conference to provide a regular platform for the critical mass of scholars interested in marketing history. Even if we exclude the 111 papers published in the Proceedings of the four Marketing History Conferences from 1983 through 1989 the increase in publication remains significant. And there is a breadth to this interest evident in developments across all three categories of historical research in marketing.

Methodology

If one were looking for a single publication or event which signalled the emergence (or rather, the revival) of history as a 'legitimate' field within the marketing discipline, it could be Ronald Savitt’s (1980) "Historical Research in Marketing." In substance it was a statement of the rationale and method for historical research, although in the latter, only one of a range of possible methodological perspectives. In spirit, however, it was both a symbol of the legitimacy of doing historical research by marketing scholars, and a challenge to them to do so. As a statement on method, Savitt’s article initiated a much needed discussion in the marketing literature about the theory and methods of historical scholarship.
There are a number of different traditions within historiography, ranging from positivist (e.g., Hempel 1959) to hermeneutic ones (e.g., Collingwood 1974). These have recently been summarized in the marketing literature by Firt (1987). Savitt proposed what was essentially a positivist method of historical research based on hypothesis testing (1980; 1982; 1984) and a search for causal relations (1988, p. 119). Kumcu (1987) has also outlined an historical method close to Savitt’s in its concern with probable causes, hypothesis testing, and relative validity of laws. On the other hand, Firt (1987) suggests going beyond such methods—that explanation and understanding of marketing history requires the interpretation and reflection characteristic of a hermeneutic approach. Fullerton (1987) distinguishes between the philosophy of history, which is concerned with epistemological and ontological issues, and historical method, which follows from the philosophy of history one believes in. Fullerton’s approach to history is based on the philosophy of German historicism (1986), a distinctive philosophy of social science, and as such, is based on assumptions very different from those of a positivist historical method. For Fullerton, the basic elements of historical method include systematic doubt, flexible use of analytical tools, use of multiple data sources, creative and critical synthesis, and a narrative form of description (1987, p.112).

In the echoes of discussions about the philosophy and method of marketing history there have also been voices calling for more historical research and providing rationales and justifications for marketing history in teaching (Peterson 1987; Witkowski 1989) as well as research (Fullerton 1987; Savitt 1980; 1982). Finally, rounding out the discussion of methodology are descriptions of various data sources for historical research in marketing (Pollay 1988a; Rassuli and Hollander 1986a).

**Marketing Content**

The 1980s mark the first period in which marketing content has accounted for the largest relative proportion of publications among the three major categories of research identified here. Within this category some fifty publications dealt with marketing activities or functions, for example, product simplification strategy (Hollander 1984a), market segmentation (Fullerton 1985), channel relations (Marx 1985) and retailers’ pricing strategies (Dickinson 1988). Among the marketing activities studied, however, advertising has become a leading topic of interest.

There are two major themes in the advertising history published during this decade. One of these is the examination of British advertising history. One prominent contributor here has been Terence Nevett, whose work includes a book (1982) on the subject. Much of Nevett’s work is comparative and cross cultural, for example, a study of societal perceptions of advertising in Britain and Germany (Fullerton and Nevett 1986), American influences on British advertising (Nevett 1988a), and vice versa (1988c). At times his work has taken on a macromarketing perspective (1988b; Fullerton and Nevett 1986) by looking at the impact of advertising on society.

Others have contributed to the recent popularity of British advertising history while focusing on specific companies (Ferrier 1986; Seaton 1986), professional sales promotion organizations (Legh 1986), and self-regulation in the advertising industry (Miracle and Nevett 1988).

A second major theme in advertising history this decade was the analysis of American print advertising over the last century. During the late 1970s Richard Pollay established the requirements for, and outlined a program of, research in advertising history. Having identified and contributed to extensive archival sources (Pollay 1979; 1988a), Pollay followed with the content analysis of American print advertising since the turn of the century to identify the values portrayed (Belk and Pollay 1985; Pollay 1984a; 1988b), the extent of informativeness (1984b), and creative aspects of advertising strategy (1985). More recently, his work has taken on a macromarketing perspective (Pollay 1988c; Pollay and Lysanski forthcoming).

Pollay’s use of quantification, content analysis, and hypothesis testing is representative of the positivistic approach to historical research. Similarly, Gross and Sheh (1989) performed content analysis of advertisements spanning 100 years in the *Ladies Home Journal* to investigate the use of time-oriented appeals. However, a diversity of methodologies is evident in recent work by others in advertising history. For example, Stern (1988) uses a descriptive approach in examining the medieval tradition of allegory and relating it to contemporary advertising strategy.

In addition to “activities and functions” three other subcategories of marketing content have attracted considerable attention. Corporate and industry marketing practices emerged as a popular field of study (Clark 1986; Erb 1985), although most of this work has appeared in the Proceedings of Marketing History Conferences. Marketing systems—the study of whole economies or systems of marketing—has also emerged during the 1980s as a significant topic for historical research (Corley 1987; Fisk 1988; Fullerton 1988b; Kaufman 1987) and is also undoubtedly related to the rising interest in macromarketing. Of course, an essential aspect of the history of marketing systems is the relationship between marketing and economic development (Dixon 1981; Savitt 1988; McCarthy 1988). The fundamental importance of marketing history to the study of economic development has been used as a justification for more historical research in marketing since the late 1950s (Myers and Smalley 1959).

A third category of marketing content which continues to hold interest for marketing historians is retailing. Next to marketing thought, retailing may have the longest consistent tradition of historical research in marketing. What we know about retailing history, however, remains largely as scattered threads, focusing on selected firms and specific individuals. In a proposal for American retailing history Savitt (1989) agrees with Hollander’s (1983) assessment of the need for a synthetic history of retailing, one which goes beyond simple, descriptive chronology, identifying patterns and integrating marketing practice with marketing thought.

Examples of such an approach include Hollander’s study of the effects of industrialization on retailing in the twentieth century (1980c) and his evaluation of hypothesized patterns of retail institutional evolution (1980a). The testing of hypotheses about retail institutional evolution has also been
a focus in Savitt’s work on retailing history. Having developed specific hypotheses from McNair’s wheel of retailing theory, Savitt (1984) used single-firm, total-product line data for a ten year period to test them. Recent work by others has also contributed to the tracing of retail institutional evolution (Cundiff 1988; Kotler 1988).

Marketing Thought

It is probably a natural progression for a discipline to move from isolated writings and courses to widely accepted theories and schools of thought. This is evident in looking at the progress of the history of marketing thought. With only a handful of publications during the 1980s on the history of marketing literature (Bartels 1988; Lichtenhal and Beik 1984) and teaching (Lazer and Shaw 1988; Schultzze 1982), the history of ideas now dominates this category. Consistently over the past forty years about one quarter of the published history of marketing thought has dealt with concepts, theories, and schools of thought. Furthermore, within this subcategory there has been a progression of interest towards schools of thought, although we continue to examine the historical accuracy of key concepts.

Among the recent historical examinations of major marketing concepts or theories are Hollander’s (1986b) discussion of the marketing concept and Fullerton’s (1988a) related study of the production era. Both scholars concluded that serious and sophisticated marketing has been practised much longer than the received doctrine suggests. Taken together these studies point to the value of historical research in evaluating existing theory. More importantly, perhaps, they have contributed to a rewriting of the history of marketing thought. This has included an extensive reevaluation of the schools of thought from which marketing emerged as a discipline (Jones 1987; Jones and Monieson 1990).

Schools of thought within the discipline have attracted increasing attention from marketing historians. Discussions of the so-called classical schools such as the institutional (Hollander 1980) and functional (Hunt and Goolsby 1988) have been complemented by studies of more contemporary schools of thought (Mittelsteadt 1989; Savitt 1989; Sheth and Gardner 1982; Sheth and Gross 1988; Sheth et al. 1988). The most extensive among the latter studies is the recent book by Sheth, Gardner, and Garrett (1988) which identifies, classifies, and evaluates twelve schools of marketing thought that have emerged during the twentieth century. Interestingly, given the criteria they used for identifying a school of thought—a distinct focus, a perspective on why marketing activities are carried out, and, association with a pioneer thinker and significant number of scholars—one might speculate on the status of marketing history itself as a school of thought.

Prospect

The recent growth of interest in marketing history is surely a natural development in a maturing discipline. Parallel debates and discussions about philosophies of science have focused the attention of marketing scholars on their identity as a discipline and have increased their tolerance of different methodologies and perspectives. A more mature marketing discipline has recognized the legitimacy of—as well as the need for—historical research.

It is also no accident that those active in marketing history tend to overlap with the group of scholars working in macro-marketing. Macromarketing issues, for example economic development, tend to demand a longer time perspective. Therefore, the institutionalization of macromarketing during the late 1970s through an annual seminar and subsequent publication of the Journal of Macromarketing helped to justify and stimulate historical research in marketing as well.

At the conference level there has been widespread acceptance by the academic associations. During 1988 the AMA, AMS, and ACR all devoted significant portions of conferences to historical perspectives. In addition to being the major outlet for historical research in marketing, the Marketing History Conferences have been a catalyst and promoter of research in the field and have served to institutionalize historical research in marketing. The success of the History Conferences (held every two years since 1983), the invisible college of marketing historians (becoming more and more visible), a regularly published newsletter ("Retrospectives in Marketing"), and a special issue in a primary journal, are all convincing evidence of the pattern Ziman (1984) has identified for the development of an academic specialty (p.94). The time may have come for a formal association and even a journal of historical research in marketing.

As for the nature of future work, this review seems to suggest trends in some key directions. For example, we have seen a synthesis of marketing practice and thought which, hopefully, will continue. As Nevett, Whitney, and Hollander (1989) recently described, “Practice is not entirely thoughtless and thought is often practice-driven” (p. xx). One natural and desirable outcome of this synthesis of practice and thought is an increase in theory development and testing. Many marketing concepts and theories are inherently historical in nature and must be tested with historical evidence. It is worth noting that such theory testing and development has been carried out convincingly with both a positivistic method of historical research (e.g. Savitt 1984) as well as a hermeneutic approach (e.g., Fullerton 1988).

Another recent trend has been that of identifying and describing sources of historical data and various methodologies of historical research. A better understanding is needed of the various philosophies of history, historical methods, types of primary historical data and how to use them. Continued efforts in this direction will help improve the quality of historical research in marketing.

In connection with this review several major contributors to historical research in marketing offered their views on the current state of interest in the field and likely future directions. There was a general recognition that the level of interest has risen during the past decade, but that much of the work being done was “superficial,” “repetitive,” and based solely on secondary sources. One response to that condition has been an attempt to raise the acceptance standards for the Marketing History Conferences. As a result, there has been consistent improvement in the depth and
quality of the papers presented there. Some feel that the editors of many marketing journals still do not appreciate the value of historical research. However, the number of recent articles published in major journals, indeed this special issue of the *Journal of the Academy of Marketing Science*, seems to signify a shift in the quality of historical research being done as well as its acceptance by the gatekeepers of the discipline.

When asked which topics will generate interest in the near future, the personal interests of those surveyed undoubtedly played a role. Nevertheless, they expected that the history of marketing thought will continue to be a focus of interest, as will marketing practices such as advertising and retailing. Notwithstanding new developments in the field, these are hot topics at this time. There has also been a recent trend to focusing on marketing in corporate and industry history. Finally, macromarketing historians have been expanding the work on the history of marketing systems.

One observation was that the discipline has defined its history too narrowly, suggesting that a broadening of historical inquiry may be in order. In this connection Stanley Hollander offered the following comments.

There is need for much effort to wean the profession away from the feeling that marketing is something that has only been thought about by male professors of marketing in the United States. There must be increasing recognition of the way in which marketing was shaped by practitioners, critics, regulators, scholars, and publicists in many fields. We are reaching out pretty well to many; we are now working in consumer behavior history. We need to do the same to those working in legal and political history. We probably also need much more dialogue with economic and business historians (1989).

In many ways our expectations for historical research in marketing are accurately portrayed by the title given to the 1989 Marketing History Conference—"Marketing History: The Emerging Discipline."

**REFERENCES**


**NOTES**

1. This includes the Proceedings of all four Marketing History Conferences. Because of space limitations we have omitted all but key citations of conference proceedings and many of journal articles. A complete bibliography is available from the authors on request.

2. For classification in the table this book was counted once in the category "marketing thought—biography." The series of sketches in the *Journal of Marketing* were not included.

3. For classification in the table this book was counted once each in the following subcategories: activities/functions, company/industry, retailing, wholesaling, and marketing systems.

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