

EXPLORATIONS AND INSIGHTS

Educational
lessons from
the past

Educational lessons from the past – marketing textbooks during the Age of Enlightenment (16th to 18th Centuries)

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Eric Shaw

Florida Atlantic University, Boca Raton, Florida, USA

Abstract

Purpose – The purpose of this paper is to critique four marketing textbooks written during the Age of Enlightenment (sixteenth-eighteenth centuries) to understand the educational lessons they taught students of marketing at the time and the lessons they might hold for the present day.

Design/methodology/approach – The method entails critically examining several marketing textbooks within the context of the great social, religious, intellectual, political and economic changes taking place at the time.

Findings – Over the period, paralleling developments in the Enlightenment, the two earlier textbooks of the age have a heavier emphasis on religious and ethical concerns along with their discussions of business issues. The two later textbooks de-emphasize spiritual themes in favor of almost completely focusing on business matters. In addition to discussing themes relevant to their times, the books anticipate concepts found in marketing textbooks of today. Generally, there is also more stress placed on immediate facts rather than enduring business principles. Yet many principles are discussed, including the most fundamental and durable principle of merchandising: “buy cheape, sell deare”.

Originality/value – There is no other review of a collection of marketing textbooks during the Age of Enlightenment in the published literature.

Keywords Marketing history, Marketing strategy history, History of marketing thought, History of marketing education, Merchandising history, Trade history

Paper type General review

Introduction

Just as in the present, novice marketers of the past learned by doing. They usually received hands-on training from those more knowledgeable and experienced in the business. The practice was institutionalized in apprenticeships in Europe starting around the eleventh century. Typically, an apprentice was bound to a master for a period ranging from 5 to 15 years and actually lived with the household, often marrying into the family and eventually taking over the business. To augment their training, textbooks explaining trade practices were written by master practitioners in England as early as the sixteenth century, thereby anticipating American marketing textbooks written by academics of the twentieth century. Although these books use the terms merchants or tradesmen, these terms are equivalent to market men, of the early twentieth century, or marketer, from the late twentieth century to the present.



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The purpose of the present work is to critique several marketing textbooks written during the Age of Enlightenment to learn the educational lessons they taught to students of marketing at the time and the lessons they might hold for the present day.

While the term “textbook” connotes a book used in a school or college classroom for formalized instruction, this is a specialized meaning. Generally, a textbook is any “book used in the study of a subject” (*Merriam Webster’s Collegiate Dictionary, 1994*, p. 1220). While there were many dozens of universities in existence throughout Europe and North America between the sixteenth and eighteenth centuries, the curricula were typically limited to theology, natural philosophy (science), law and medicine (*Hofstadter, 1955*). There was no business curriculum nor were any marketing courses taught in universities prior to the twentieth century in America (*Bartels, 1976*). These early marketing books, written by merchants, for instructing young apprentices served the same purpose as textbooks of today and were the forerunners of early marketing texts written by academicians for students in universities.

The Age of Enlightenment was a period of great intellectual and scientific development in Western Europe from the sixteenth to eighteenth centuries, emphasizing knowledge based on reason and evidence to address social, political, religious and economic issues. The age represented a bridge from the medieval period to modern times and included such enlightened thinkers as Montaigne (1533-1592), Francis Bacon (1561-1626), Galileo (1564-1642), Johannes Kepler (1571-1630), Thomas Hobbes (1588-1679), Rene Descartes (1596-1650), John Locke (1632-1704), Isaac Newton (1642, 1727), Voltaire (1694-1778), Benjamin Franklin (1706-1790), David Hume (1711-1776), Jean-Jacques Rousseau (1712-1778), Adam Smith (1723-1790) and Immanuel Kant (1724-1804), among many others. The enlightenment provided the intellectual capital for the political upheavals of the American and French Revolutions, and heavily influenced the economic upheaval of the English Industrial Revolution.

Four textbooks authored during the Age of Enlightenment are critiqued here. They were chosen partly because they are believed representative of selections during the times, but mostly because copies of the original manuscripts were readily available. The four textbooks are:

- (1) *the Marchants Avizo* written by *Browne (1589)*;
- (2) *an Essay on Drapery* by *Scott (1635)*;
- (3) *the Complete Tradesman* penned by *Merchant (1684)*; and
- (4) *the Complete English Tradesman* by *Defoe (1726)*.

These books were products of their times. There is a noticeable shift of emphasis from religious and ethical concerns along with discussion of business issues during the early enlightenment to almost completely ignoring spiritual themes in favor of business matters during the late enlightenment. Indeed, one of Daniel Defoe’s (1660-1731) novels was considered by contemporaries a model of the age’s enlightened thought:

There is one book which, to my thinking, supplies the best treatise on an education according to nature [...] it will be the text to which all our talks about natural science are but commentary. It will serve to test our progress towards a right judgment, and it will always be read with delight [...] What is this wonderful book? Is it Aristotle? Pliny? Buffon? No; it is *Robinson Crusoe* (*Rousseau, 1762 [1974]*, p. 147).

The early texts lay a heavy emphasis on God and prayer. This is not surprising considering the great political and religious upheavals and reversals in England during the sixteenth-eighteenth centuries. This was a time of turmoil and turbulence with frequent loyalty oaths and recurring heresy trials in which hundreds of people were hung, drawn and quartered for their alleged treasonous political leanings or burned at the stake for their alleged heretical religious convictions. At least one of our textbook authors was jailed on several occasions for his outspoken political views.

To appreciate the massive scale of political and religious instability in England, during the roughly 150 years between the first and last marketing text written during the Age of Enlightenment, we commence with a brief sketch of the turbulent times to provide historical context. The series of battles known as the Wars of the Roses resulted in devastating political upheavals, following the alternating rises and falls in the fortunes of the House of York (white rose) versus the House of Lancaster (red rose). Within a generation after the final dynastic defeat of Plantagenet King Richard III (of York) and victory of the Tudor dynasty's King Henry VII (of Lancaster), there followed cataclysmic religious upheavals between the Roman version of Catholicism versus the Anglican version of Protestantism. After his excommunication in 1533 for annulling his marriage to Queen Catherine (of Aragon), King Henry (Tudor) VIII disbanded the Church of Rome and created the Church of England. After Henry's death and the six year reign of his sickly young son King Edward VI (by third wife, Jane Seymour), this religious edict was reversed by older step-sister "Bloody" Queen Mary (Tutor, by his first wife Catherine of Aragon) who restored Catholicism during her five-year reign. After Queen Mary's death, "Papism", as it was called, was re-reversed upon younger step-sister Elizabeth's (by Henry's second wife, Anne Boleyn) accession to the throne in 1558. In addition, a re-re-reversal would have occurred if Mary (Stuart) Queen of Scots, a devout Catholic, had actually attained the throne rather than being executed as an alleged co-conspirator in a plot to assassinate her cousin Queen Elizabeth. Subsequently, Elizabeth (and the Tudor Dynasty) died without heir.

Thus, beheaded for treason, Mary Stuart's son, King James VI of Scotland, a converted Protestant, became King James I of England in 1603 (through the bloodline of his great-grandmother Margaret Tutor, daughter of King Henry VII and his wife Elizabeth of York [niece of Richard III who imprisoned and murdered her younger brothers, Edward V and Richard, the "Princes in the Tower", which marriage finally united the Houses of Lancaster and York with a symbolic pink rose] and elder sister of King Henry VIII). When King James' son Charles I inherited the throne, however, he created a schism in the Church of England over the issue of whether prayer should be ritualized versus extemporaneous, a contributing cause to the English Civil Wars that followed. There were, in short order, King Charles I's execution (1649), Cromwell's "Protectorate" (1654-1659) and son King Charles II's "Restoration" (1660). Unfortunately, for religious stability, King Charles II died without heir (i.e. a legitimate child), although he insisted his nieces Mary and Anne be raised Protestant. Ascending to the throne, Catholic younger brother King James II, after a three-month reign, was deposed in favor of his Protestant-raised daughter Mary (Stuart) and her husband William of Orange's accession to the throne in the "Glorious Revolution" (1688). Following the deaths of William III and Mary II, without heir, more plotting and scheming was necessary because next in line was James Edward Stuart (son of deposed Catholic King James II's second wife) also a devout Catholic. To avoid another religious

upheaval, parliament passed the Act of Settlement in 1701 banning a Catholic succession, paving the way for Queen Mary II's younger sister Anne to become Queen. However, Queen Anne I also died without heir marking the end of the Stuart dynasty and also the end of the English religious clashes and struggles. Requiring some search, but without much ado, George of the House of Hanover (although quite distant, he was Queen Anne's closest living *Protestant* relative through the bloodline of Sophia of Hanover, granddaughter of King James I) became King George I in 1714. With so much intrigue and shifting of political and religious fortunes, over two centuries, frequent prayer and good luck must have seemed like the only hope for salvation if not survival.

John Browne, *The Marchants Avizo*, 1589

To provide some historical context, *The Marchants Avizo* was written during the reign of Queen Elizabeth I (1558-1603). Two years after, Mary, Queen of Scots, was beheaded for treason, and John Winthrop became governor of the Massachusetts Bay Colony. It was written less than one year after the defeat of the Spanish Armada. During the same year, Richard Hakluyt (the great geographer and promoter of English colonization in North America) wrote: "The Principall Navigations and Discoveries of the English Nation".

The *Marchants Avizo* provided advice for a young man serving an apprenticeship as a merchant's agent abroad. In an interesting play on a pen name, the author's name and occupation are hidden in the pseudonym of I. B. Marchant. In Middle English, "I" and "J" are reversed, and the author's real name is John Browne (initials representing the syllables as words I. B. a Merchant). The son of a draper of the same name, Browne was bound at age 16 as a merchant's apprentice. During his eight year service, he traveled to Spain and Portugal as an agent for his master. Later, as a successful merchant, remembering his own experiences, he recognized the value of a guidebook to help his young apprentices abroad (p. 3) and so wrote *The Marchants Advizo* (in modern day parlance: The Merchant's Advice or Advice to a Merchant).

The book is 65 pages and covers a number of policies, or guides to action, for a moral and successful business life. It also includes samples of business letters for the apprentice to write and examples of business math for the apprentice to practice. Additionally, there are a variety of bills and accounts to learn and soothing words to meditate upon.

Browne starts the book with a set of policies to guide the apprentice to success in his business ventures abroad. These policies include: prayer, timely information, secrecy, modesty and avoidance of temptation, obedience, trustworthiness, honesty and more prayer. There is considerable overlap and frequent repetition among policies, such as prayer in Numbers 1 and 8, secrecy in 2 and 3, courteousness in 4 and 6 and veracity in Policies 6 and 7.

The first policy is prayer. (in Middle English, the "u" and "v" are usually reversed). "Doe not forget vpon your safe arriuall at your Port, giue vnto God most hartie and humble thanks for his gracious protection of you" (p. 9). Prayer and godliness, and their importance for a successful business venture, are continually emphasized throughout the book.

The next policy is to keep your master informed. After praying, "write a letter to them that you haue to deale for, of the ariuall of your ship" (p. 9). The letter should be posted by the first available ship bound for England. Moreover, the apprentice was urged to

write frequently: “And so write likewise by your letters [...] of the state of your businesse, and of the newes of the country”, taking care when posting “to write and deliuer your letters secretlie” (p. 9). With an apprentice representing him in business dealings, it is not surprising that the master wanted to be continually informed of his apprentice’s activities. Browne also provides samples of such letters for the apprentice to copy, discussed shortly.

The third policy is secrecy. As also stated above, it is important to “deale closely & secretly in all your affaires and busynes” (p. 9). Secrecy was a concern, then as now, because of the cut-throat nature of competitors stealing suppliers or customers.

Fourth is to remain humble and avoid temptation. The apprentice should:

[...] shew yoursefe lowly, courteous, and seruiceable vnto every person. [And] be not seduced [...] to play at any kinde of game, especially dice or cards [...] or keeping company with women, nor go fine and costly in apparell: for all these things [...] doe bring any yong beginner to vtter discredit and vndoing (p. 10).

There are several reasons for this policy: the moral nature of the times; a concern with the apprentice risking, losing or spending the master’s capital or inventory; and the recognition that “gambling and wenching” is time consuming, and such time was more profitably spent in the master’s service.

Next is obedience, to follow the master’s directions completely. Even if it:

[...] sometimes seeme to your selfe, that you shall better please your marchant, not to buy those wares which he appointeth, because of the deareness of them: yet you shall giue euermore best contentment to your marchant, and saue your selfe harmelesse, when you followe his owne order (p. 10).

It is clear that the master “knew best” and wanted his directions followed assiduously, rather than allowing the apprentice to risk capital following his own initiative.

Sixth is to keep the laws and customs of the land:

When you be in the countrey of Spaine or else-where: shewe yoursefe lowly and courteous to all people, and learne what be their ciuill lawes and customs, and be carefull to keepe them” (pp. 10-11).

This policy was intended to keep the apprentice from inadvertently getting into trouble in a foreign land and possibly having the master’s goods confiscated.

The seventh policy is honesty. “Be most faithful & just in all your accompts with euery man, & defraud no man willingly not the value of a farthing” (p. 11). More concern with the moral side of life. It was also practical to instill honesty in the apprentice because lying could become a bad habit that might also be directed at the master.

Last is to continually pray for God’s benevolence:

Let this be your first and chiefest point in all your actions: that especially you omit not your dutifull seruice towards almighty God, but euerie morning and night, to pray that God will still prosper and protect you [...]. if you be mindful of your dutie and seruice to God, all things shall go well and [you shall] haue happy successe (pp. 11-12).

The apprentice could not be admonished enough to thank God for his benevolence. Also, frequent prayer left little spare time for gambling, drinking and wenching reinforces the policies concerned with being humble, obedient and honest.

After these guiding policies for success, Browne provides examples of “all such letters as you shall need to write throughout your whole voyage” (p. 12). These include a letter of safe arrival at port and a letter if the ship is blown off course and arrives at a different port. There are also letters to merchants and letters of thanks. The religious emphasis is highlighted by most letters starting with the introductory sentence: “After my dutie remembered [i.e. thanks to God], I pray your good health & prosperity, &c” (pp. 13-15). Again, the continual emphasis on prayer and Godliness.

There are also tables of “waights, measures and value of monie” given for “Portingale, Spaine and France” (p. 19). Various qualities and attributes are discussed for pepper, ginger sugar, iron, wines and almost a dozen other products. For example:

Note, that of Salt the brightest and whitest colour is best [...] which if it be new, it is perceived by the moistnes of it, and by sticking of it to your fingers, after hard wringing of it in your hande (p. 24).

Browne covers business math by showing examples of additions and multiplications for various Spanish accounts. He also includes examples of “a bill of lading [...] several bills of exchange, an acquittance, a letter of attorney, a bill of debt, an obligacion, and a Policie for assurance [insurance policy]” (pp. 47-52). So, in addition to business policies, form letters and math exercises, the book also discusses general business knowledge, product information and model legal forms.

Browne also provides “certaine Godly sentences necessarie for a youth to meditate vpon” (p. 55). These meditations include, in apparent order of importance: God, the sovereign, parents, one’s betters and generally be obsequious to all others. First, “Feare God; for he can destroy both thy bodie and soule”. Next, “Honor thy Prince: for she [Queen Elizabeth] hath power ouer life and death”. Third, “Loue thy parents: for they are the best friends thou shalt euer haue”. Fourth, “Giue reuerence to thy betters: for therein thou shalt haue honor to thyselfe”. And lastly, to protect your good reputation just in case your character is called into question: “Be courteous and lowly to all men: for thereby thine enemies report shall be doubted of” (p. 56). When not thinking about business, the safest course for the apprentice was to be thinking about God.

The book ends with: “The Conclvsion, which is an historie very profitable and delightful for a youth to reade and meditate” (p. 57). This story is reminiscent of Aesop’s fables. It is about a wise old lion (surrogate for master) that counsils a headstrong young lion (surrogate for apprentice) against seeking revenge on a woodsman. The young lion fails to heed the advice and is ultimately killed. The moral: “[...] destruction come vpon those which shall not accept & obey the good counsell & instructions of their aged fathers” (p. 59). As reflected in the story, an apprentice’s duty was obedience to the master and acceptance of his sage advice.

William Scott, *An Essay of Drapery*, 1635

An Essay of Drapery was published in 1635, a year after the Covent Garden Market opened in London, the same year the inland postal service was established in England, and settlers led by John Winthrop the Younger colonized Connecticut, a year before Harvard College was established in Cambridge, Massachusetts, two years before the first English trading post was established in Bengal, India, and the Dutch Tulip bubble burst; four years before the English settled Madras, India and just seven years before income and property taxes were introduced in England, the first battles of the

English Civil Wars began with the Cavaliers (King Charles I's supporters) capturing Marlborough and the Roundheads (Parliamentary opponents) capturing Winchester; and in science, the passing of the torch in 1642 with the death of Galileo Galilei and birth of Isaac Newton.

William Scott was born in London in 1613. He served seven years as a draper's apprentice graduating to freeman and a place in the guild at age 21. In the preface of his book Scott describes himself as a "yong Citizen", and apparently to justify his place in the Draper's guild, he writes: "he who at 20 hath not given some token of his sufficiency, will hardly doe it afterward". *An Essay of Drapery* was published in 1635 and is more than 40 pages. Although it was written particularly for the drapery trade, the book is generalizable to all forms of retailing.

Scott dealt with the usual elements of the retailing mix: product line and merchandising, price, promotion and store layout. However, he was particularly concerned with customers and ethical dealings; and his treatise is subtitled "trading justly, pleasingly and profitably". Scott's version of the marketing concept involves "the good of both parties" (p. 18). Thus, ethical and moral considerations were of first importance: "Hee cannot bee a good Draper [retailer or marketer] who is not first a good man" (p. 17). The merchant must be honest, but he also must be wise. Wisdom without honesty causes illicit actions, but "honesty without wisdom is unprofitable" (p. 17).

Scott was aware of product attributes and emphasized both tangible and intangible product characteristics. Cloth, for example, could have coarse or fine wool, could be thick or thin, dry or moist, and there was quality and quantity to be considered, involving weight, measure and color (pp. 17-18).

Regarding price, Scott accepted the old maxim: "buy cheap, and sell deare" (p. 18) – but within reasonable limits. He also realized it was just as much a mistake to sell too cheap as too dear: "Commodities sold by retayle, must bee sold dearer [...]; the labour and care in selling them thus being the greater: not to doe so is to undervalew the labour and care of the whole profession" (p. 22). He was opposed to the government setting or regulating price, which carried over from the medieval concern with the "just price", writing "it is impossible for Law to determine the value" (p. 19). Scott would have accepted the guild regulated price as the fair or just price.

Scott also recognized the time value of money and that it was not usurious, contrary to prevailing church opinion (a point on which Catholics and Protestants agreed), to sell on credit for a higher price: "commodities may bee sold dearer for time, then ready money" (p. 22); and he reproached those who "buy wares for time, yet pay not for them at the time agreed upon" (p. 21). Scott cites a primitive example of sound and honest business practice:

The Indians of Guiana, when they promise any thing, will deliver a bundle of sticks equal to the number of dayes or moneths that they appoint, and for themselves will have another bundle of the like number: every day or moneth they take away a sticke; when all is taken away, they know the time of their appointment is come (pp. 21-22). [...] Tis our misery, that we are called Christians yet live like Heathen; but here it were well if wee could [...] doe like these Heathen (p. 22).

He was also concerned with deceptive practices, particularly those involving personal selling and promotion. Outright lying was deceitful and "a sinne", but what about flattery? He notes that "Some customers will grow dull and displeased, if they bee not often whetted by a flatterer; downe-right honest speeches discontent them" (p. 20).

Although “flattery is the corruption of truth”, his advice is rather practical: “So, I say flatter, but sin not, if that be possible” (p. 20). Scott appreciates the difficulty of drawing a fine line between puffery and deceit.

Scott also recognized the significance of store atmospherics and criticized the practice of dark shops “to make the wares seeme better than they are, that the seller may receive for them more than they are worth” (p. 21). Beyond a deceptive trade practice: “It is to bee lamented, that men have too darke shops: but more, that they have too darke mindes” (p. 21).

Regarding the practice of business in general, Scott offers much practical advice in the form of maxims. For the businessman, “a deepe inspection into his trade is necessary, they take least delight in their businesse, which know least of it” (p. 24); and “let him that will take the profit, take the paines” (p. 30), anticipating the modern day saying “no pain, no gain”.

Scott does not separate a man’s business activity from the rest of his personal life, so it is not surprising that he goes beyond the concept of a marketing audit in favor of a complete personal audit for the tradesman. He includes such advice as “let him not haunt taverns too much” avoid “superfluous diet” and “needless expenses in clothes” (p. 33). A trademan should also be wise enough to keep business to himself; rather “than to let his wife know of his affaires; every men experience can tell him of the mischief done by women talking” (p. 34). (For an interesting contrast, see the diametrically opposite position taken by Defoe, 1726, below).

Finally, Scott offers some spiritual advice to the tradesman, “that he be sincerely and constantly religious; so he may expect Gods blessings upon his labour” (p. 30). Scott concludes his treatise with a return to his original premise: “let him trade now, as he may be able to give an account of his trading hereafter” (p. 41). Retailing was an honorable profession for Scott and when it was practiced well, in his view, a path to heaven.

Next are two books about trade, trading and tradesmen. These terms are equivalent to our more modern market, marketing and marketmen (early twentieth century) or marketer (late twentieth).

NH Merchant, *The Complete Tradesman*, 1684

The *Tradesman* was published in 1684, a year after Mathew Hale wrote: “A Discourse Touching Provision for the Poor” and William Petty penned: “The Growth of the City of London”; about the time, the penny post was established in England, the first bank checks were issued, London merchants started meeting at Lloyd’s Coffee House to underwrite shipping risks and England opened its trade with China. Five years before King James II abdicated and Parliament proclaimed William and Mary King and Queen for life.

The Complete Tradesman: or the Exact Dealers Daily Companion was written under the pseudonym of Merchant (1684). The purpose of the work and its intended audience are described on the title page:

Instructing him thoroughly in all things absolutely Necessary to be known by all those who would thrive in the World, and in the whole Art and Mystery of Trade and Traffic, and will be of constant Use for all:

Merchants, Whole Sale Men, Shop Keepers, Retailers.

Young Tradesmen, Country Chapmen.

Industrious Yeomen, Traders in Petty Villages, and all Farmers.

Others that go to Country Fairs and Markets, and for all men whatsoever, that be of any Trade, or have any considerable Dealings in the World.

The book is more than 175 pages and is divided into 17 chapters, followed by numerous tables. Topics move from macro to micro in a logical progression. A brief listing of topics included in the table of contents shows its vast scope. The first set of chapters involves trade, from general to specific: “Trade in General”, “the Trade of London” and “the Trade of London into the Country”. Next there is a sequence of chapters on different types of tradesmen: “Shop-Keeping Trades”, “Pedlers and petty Chapman”, etc. There is a chapter on how to set up the business, another chapter on giving directions for managing it and still another on managing domestic affairs. Additional chapters describe the commodities of other countries and the customs, rules and directions for merchants dealing in foreign lands. There are also chapters explaining corporations, the post office and the docks, as well as a chapter on keeping books of accounts.

Among other useful adjuncts, the *Tradesman* includes a perpetual calendar, an alphabetical list of carriers, waggoners and stage coaches entering and leaving London, a list of the principal fairs in England, a tide-table, intercity distances between major cities and market towns in England and Wales, an almanac, an expense account, weights and measures and many other tables. Merchants (i.e. marketers) are defined as those who “negotiate and traffick”; and merchandising (i.e. marketing) as an “Art or Science, invented for the publick good and profit of all, supplying the native wants of one place, by the abundance of others” (p. 5).

Although he does not use our modern terminology, Merchant develops a logically coherent framework which conceptually distinguishes levels of sophistication in the historical development of trading. Trade evolves first from bartering, then to marketing and finally to financing. Bartering is “when goods are exchanged for goods” (p. 6). Marketing is the exchange of “goods for money, and this is termed bargaining or buying and selling” (p. 6). Marketing arose from bartering, when “men finding it too difficult and troublesome to carry about them all things thus bargained and truckt for, from place to place, invented a common standard or measure [...] and this is called money” (pp. 6-7). Financing is the exchanging “of so much money in one place to one, who should cause it to be again repay’d in another place, by another for him” (p. 6). Based on the logic of his framework, Merchant explains how the simplicity of trade evolved into complexity, thus resulting in its apparent mystery:

The first [barter] of these wayes [of trade] was taught to mankind by necessity, the second [marketing] was found to facilitate the first, and the third [financing] to facilitate the second. Thus was the origin of exchanges, to accommodate commerce [...] [It] was first practiced without benefit or loss, or any other consideration [...] but in time it came to be considered that the party paying [for goods to resell] loses time and runs a hazard, and therefore it was held reasonable that he should have some benefit. Money being remitted for benefit, without so much respect to the end of the original institution. Hence exchanges are converted to an art or mystery (p. 7).

The mystery arises because the marketing process is more roundabout than barter, which is just a simple direct exchange between two traders who are also producers who each want to consume each other’s product (i.e. directly supply the other’s demand). Marketing is more complex, because standing between producers’ supply, there exists

an array of middlemen (such as agents, wholesalers and retailers) to match final consumers' demand (i.e. original producers deal indirectly – through middlemen – with final consumers).

The art in barter involves the trader being familiar with the commodities he deals in, their value, perishability and the lands where they are plentiful or scarce. Marketing requires a greater refinement in the art of trade; the tradesman also had to know the customs by which things are bought and sold, such as by weight or measure and the current prices of goods. With financing, the art is refined still further; the tradesman must also know the current exchange rates of money in different places and how to negotiate the required legal documents, for instance Bills of Exchange or Letters of Credit.

Merchant offers the tradesman some general advice, "Directions for the well managing a Trade" (p. 38). Before launching a career, one should first acquire experience as an apprentice or journeyman; and it is easier to start small rather than with a large overhead. Some other maxims include: "he that lies long in bed his estate feels it" (p. 39), "do not engage in too many businesses, lest some irons burn [...]" (p. 39), "avoid those hangers-on that are the flies which attend the flesh of others tables, and requite you with their maggots" (p. 42) and "the entertainment of great persons is a great vanity" (p. 43).

Merchant's book could have served as a model for Defoe. As a literary genius, however, Defoe produced a book of marketing instruction that can only be described as a *tour de force*.

Daniel Defoe, *The Complete English Tradesman*, 1726

The most comprehensive textbook on marketing, prior to the twentieth century, was undoubtedly *The Complete English Tradesman* written by Defoe (1726). This two-volume work is encyclopedic in scope, containing 51 chapters and almost 600 pages.

Defoe was born in 1660. He is the author of more than 500 published works. Although best known as a writer, particularly a novelist and journalist, he also had careers as a soldier, politician and businessman. His main works of fiction includes: *Robinson Crusoe* (1719), *Moll Flanders* (1722) and *Roxana* (1724). He also published *Defoe's Review* (1704-1713), a weekly newspaper, known as a Mercury, containing news and essays, which competed with other such notable weeklies as the *Tattler*, *Spectator*, *Idler* and *Adventurer*. Published in the *Review* are business essays on "Credit", "Distribution", "Wealth" and "Trade".

The essay "On Trade", written on February 3, 1713, is particularly notable because it contains what this writer believes is the origin of Smith's (1776/1937, p. 423, italics added) great metaphor of the invisible hand: "As every individual [...] intends only his own gain [...] he is led by an *invisible hand* to promote an end [the public good] which was no part his intention". Smith would undoubtedly have read Defoe's work and may have intentionally or unconsciously made the connection. In his essay, Defoe writes (brackets and italics added): "God [will] guide nations by *invisible* directions into trade, and lead them by the *hand* [...] to render commerce both easy and useful".

Defoe also wrote travel guides, biography, ghost stories and political satire, which landed him in jail more than once and he was even pilloried (locked in a wooden stock with holes for holding his head and hands securely that subjected him to public humiliation). He was a dismal failure in his own business ventures, was involved in eight law suits between 1688 and 1694 and was declared bankrupt in 1692 for the princely

sum of £17,000 pounds (equal to about £1,800,000 or \$2,670,000 in 2015 currency). Despite his own unprofitable ventures, Defoe proved quite successful in writing about business. Based on its frequent re-printings, just after Defoe's death to the present, it is probable that *The Complete English Tradesman* dominated business thought and was the most widely read marketing text in the English language until at least the late 19th century. *The Complete English Tradesman* was written as letters starting in 1726, and Defoe died a few years later in 1731 before it was republished as chapters in a book in 1745 (or possibly earlier).

Defoe describes the purpose of the work as “a collection of useful instructions for a young tradesman; which are the more necessary, as there never were so many bankruptcies or failures in trade as of late” (p. 9). Probably because *The Complete English Tradesman* was originally written as a collection of letters before being combined into a book, it meanders over topics, detouring here and wandering there, often returning to the same subject many chapters later, giving the distinct impression that Defoe dabbled on *The Complete English Tradesman* now and then while working on other writing projects and never quite got around to a final editing.

A lack of editing is obvious starting in the Introduction, where a muddled description of “who are to be deemed tradesmen” is stated but not clarified until almost 50 chapters later. Tradesmen include: “merchants [...] dealers [...] petty chapmen [...] pedlars” (Vol. 1, pp. 1-2), as well as “retailers [...] wholesalers [...] carriers [...] brokers, and buyers and sellers; [but] the farmer [and] manufacturer [...] are not tradesmen in the present sense of the word” (Vol. 2, pp. 207-8).

Presciently, Defoe's notion of a tradesman conforms to the early twentieth-century concept of the marketer, which includes those who create “time, place and possession utility” (i.e. middlemen), according to Converse and Huegy (1930, cited in Shaw, 1994, p. 54), for example, but “excludes those who produce form utility” (i.e. farmers and manufacturers).

The Introduction also explains what a “complete tradesman” should learn from reading this book. First, an understanding of all the inland trade of England, so the tradesman may:

[...] be able to turn his hand to anything of the manufacture of his country, as his circumstances may require; and may, if he sees occasion, lay down one trade and take up another, without serving a new apprenticeship to learn it (Vol. 1, p. 3).

Second, he must have “not only a knowledge of the species or kinds of goods, but of the places and peculiar countries where those goods are produced or made, and how to come at them at the first hand” (Vol. 1, p. 3). Finally, an understanding of:

[...] all the methods of correspondence, returning money or goods [...] to and from every county in England; what goods are generally bought for ready money, and what for time [credit] [...] what markets are the most popular [...] and when; and what fairs or marts are proper to go to, to promote his own particular business (Vol. 1, p. 3).

In sum, Defoe's purpose is to provide the tradesman/marketer with a complete understanding of the subject and practice of trading/marketing.

The first half dozen chapters are concerned with the tradesman's preparations as an apprentice. In his “first years”, he needs “to gain a good judgment [of] wares [...] to weigh and measure either liquid and solids, to pack up and make bales, trusses, &c” (Vol. 1, p. 5). Also, in his early years, he should learn basic marketing activity: “buying

and selling” (Vol. 1, p. 7). After these business fundamentals, the apprentice needs to learn about writing letters, and a number of sample letters are shown as illustrations of good and bad writing. Defoe suggests a simple style: “Easy, plain, and familiar language, is the beauty of speech in general, and is the excellency of all writing; [...] the end of speech is that men may understand one another’s meaning” (Vol. 1, p. 19). Such advice is just as valid today.

The book includes as much as a half dozen chapters each on such topics as the causes of bankruptcy and reasons for business failure, avoiding frauds and unfair trade practices, the keeping of accounts and issues involving creditors and debtors. Much of Defoe’s discussion of trade practices, possibly because of his own negative business experiences, is framed negatively in terms of avoiding losses rather than positively as a means of generating profits.

To show how well he anticipates the future, some of Defoe’s concepts are recast in terms of the modern marketing mix framework. A long list of domestic products and where they are principally produced are itemized. The composition of a suit, dress and home furniture and the geographical source of each material are detailed. Defoe also discusses their physical distribution: “carriage by land and sea” (Vol. 2, p. 170). Several channels of distribution are described, such as the “coal trade from the mine [...] at Newcastle [...] to the last consumer [...] in London” (Vol. 2, pp. 170-72). Less vivid channel descriptions are given for tobacco, barley and cheese among other commodities, and “manufactures of wool, metals, minerals, &c”. (Vol. 2, p. 184). Extensive tables of these manufactures by type and location are also provided.

In retailing, Defoe recognizes that a major cause of business failure is choosing the wrong site location: “retailers [...] fixing their shops in such places as are improper for their business” (Vol. 1, p. 56). Not only is the site significant but also the retailer must match the product assortment with the right clientele: “a particular assortment of goods suits one part of town [...] and not another” (Vol. 1, p. 58). Defoe also realizes there are more marketing variables to mix: the “tradesman’s shop” should be “well sorted” and “suitably furnished” and thereby “fitted to supply his customers” (Vol. 1, p. 60). Thus, the product assortment and store appearance should complement each other and match the desired customer segment.

Product assortment concerns are extended from retailers to other members of the channel of distribution. For example, when “merchants send adventurers to our British colonies [in North America] [...] to make up [...] a sortable cargo [they should choose goods to] make them all marketable together” (Vol. 1, p. 59). If complimentary goods are acquired and transported together, they can be marketed collectively.

Several pricing issues are raised. One is over-charging. A tradesman may “ask more than he will take [although] some people [notably the church] condemn this practice as dishonest” (Vol. 1, p. 178). Defoe suggests that it is frequently “the buyers that make this custom necessary” (Vol. 1, p. 178), because it follows “when the one undervalues the goods, that the other as much overvalues them” (Vol. 1, p. 195).

The other side of the coin is “underselling”, pricing below the competition. A practice, he writes, has “grown to such a shameful height, that particular persons publically advertise that they undersell the rest of the trade” (Vol. 2, p. 102). Defoe was undoubtedly influenced by the medieval concept of the “just price” and later “guild price”. This was originally a traditional price and later one established by the guild. Pricing above or below was a questionable business practice, and to advertise, a low ball price was

doubly disreputable, as Defoe points out. Thus, he advocates the traditional practice of all members of a trade charging the same price. A half century later Adam Smith would clarify how the competitive forces of supply and demand for a product created its market price.

An interesting example of prestige pricing is noted. Defoe argues that the English silk manufacture is superior to the French, but the English people “unjustly” prefer foreign to domestic goods. To compensate for fickle customers, there is a “gross trading fraud among the mercers” (Vol. 1, p. 199). They sell English silk as French and then make the buyer pay a premium price!

Defoe also discusses several elements of the promotional mix, including atmospherics and personal selling. He thought it excessive that “tradesmen lay out two-thirds of their fortune in fitting up their shops [...] in painting and gilding, in fine shelves, shutters, pediments, columns [...] and the like” (Vol. 1, p. 205). He regards this practice of atmospherics as: “no more than [...] a net spread to catch fools; it is a bait to allure and deceive” (Vol. 1, p. 212). A similar example occurs when retailers “set the goods in a false light [by using] artificial side windows, trunk lights, &c [...] to deceive the buyer” (Vol. 1, p. 194) by making the goods appear better than they are. Again, Defoe focuses on the negative side; he does not see the value of making goods appear more desirable.

Another concern with deception arises in personal selling, to deceive the buyer “by the help of the tongue [...]. The shopkeeper ought indeed to have a good tongue, but he should not make a common whore of it” (Vol. 1, p. 194-5). As Scott (1635) also pointed out, sometimes the difference between puffery and deceit is a subtle and fine line, and Defoe does not suggest where it should be drawn.

Recognizing the importance of fads and fashions, Defoe describes the “changes of trade [...] from what it was in former times” (Vol. 2, p. 153). This recognition is important:

[...] though the management [...] policies are the same [...] [products] differ [...] because habits, and the form of clothing, are changed by the fancies and fashions of men so trade is necessarily bound to follow (Vol. 2, p. 154-56).

Thus, the tradesman has to keep up with changing customer wants and desires.

Regarding credit as “the life and soul of business” (Vol. 1, p. 269), Defoe notes the effect on demand: “Trade is anticipated by credit, and it grows by the anticipation: for men often buy clothes before they can spare the money [...]” (Vol. 1, p. 270). Therefore, Defoe frequently notes the importance of “the tradesman’s punctual paying his bills [...] and the credit he gains by it” (Vol. 1, p. 277).

Unfair trade practices are also discussed particularly “engrossing”. This means buying up all the goods (in gross), often a shipment of imports off the boat, such as spices, silk or tobacco, so as to corner the market and create a short-term monopoly. The “engrossers then put their own price upon those goods for a while, and so impose upon the whole nation!” (Vol. 2, p. 111). The trade practice of engrossing, along with its two cousins: “forestalling”, a conspiracy to keep a competitor’s supply of goods off the market to create a short-term monopoly, and “regrating”, a conspiracy in which a succession of middlemen unnecessarily buy and sell to raise the price of a good to the final buyer, were business offences in English common law and condemned since early medieval times.

There are several concerns with debt and credit. One is the possible effect of bad debts on a channel:

The credit usually given by one tradesman to another [...] by the merchant to the wholesale-man, and by the wholesale-man to the retailer [is often repaid] by the buyer as his convenience admits [...] putting the seller off [...] from week to week [...] making promises of payment, which he is forced to break (Vol. 1, p. 180).

And yet, if the consumer fails to pay the retailer, there may be repercussions throughout the channel, as a chain reaction develops causing each subsequent channel member to fail.

A particularly pernicious form of debt was mentioned and criticized by Defoe. This was “suretyship”, the practice of one person being bound for the debts of another – a common consumer trade practice in medieval and renaissance Europe”. Although not mentioned as an example by Defoe, perhaps professional jealousy, the classic case of the dangers of one person standing as surety for a debt was eloquently presented a hundred years earlier by his countryman William Shakespeare. In *The Merchant of Venice* (Act 1, Scene 3), Bassanio offers his friend Antonio as surety to Shylock for a loan of 3,000 ducats. Shylock’s condition if Bassanio has failed to repay the debt on time was for Antonio to forfeit a pound of flesh. And later (Act III) when Bassanio’s ships are lost and his business venture bankrupt (Scene 2), Shylock intended to extract Antonio’s heart (Scene 3). Ultimately, the hero’s heart was saved from Shylock and lost to Portia, the woman who saves his life; after all, the play is a comedy not a tragedy. But the lesson on surety is clear.

Defoe continually emphasizes “the peculiar value of credit and a good name among tradesman” (Vol. 1, p. 149). A tradesman should not disparage the reputation of his competitors: “A tradesman’s credit and a maid’s virtue ought to be equally sacred from evil tongues” (Vol. 1, p. 150). Moreover, a tradesman should not make “false accusations and false charges”, nor should he raise “rumours and suspicions upon the credit and character of young tradesmen” (Vol. 1, p. 155). It was particularly unfair to pick on a tradesman just setting up his business because having not yet established his reputation he was especially vulnerable.

There is much discussion of business math and balancing the books. It is critical for a tradesman:

[...] once a year to balance their accounts of stock, and of profit and loss; by which means they could always tell whether they went backwards or forwards in the world; and this is called casting up shop [...] it is always to me a bad sign when it is omitted, and looks as if the tradesman was afraid of entering into a close examination of his affairs (Vol. 1, p. 309).

Defoe discusses at length the cash book, petty cash book, journal and blotting book. In addition, “in case of fire [...] or many other occasions” (Vol. 2, p. 62), it is wise to keep a duplicate of the ledger.

In addition to anticipating concepts found in marketing management, Defoe also anticipates concepts that are now considered part of macro-marketing. His concept of “the circulation of trade” (Vol. 2, p. 94) anticipates the Physiocrats of France by several decades, and his recognition that “Trade should be a current channel [of distribution]” (Vol. 2, p. 114) anticipates the American pioneers in marketing by two centuries.

Realizing the multiplier effect of trade on the economy, Defoe writes: “that trade should run through as many hands as it can” (Vol. 2, p. 90). The more people involved in trade, the greater the benefit:

Trade [...] maintains multitudes, and increases them by the consequence of their labour [...] raises towns, cities, and populous villages [...] employs the people, and pays them wages for their labour [...] increases by those people consuming and wearing the manufactures they make, as well as the provisions they buy. Thus, trade is a public benefit (Vol. 2, p. 99).

Defoe anticipates the macro–micro dilemma – what is good in the aggregate may be bad for the individual (and vice versa). Although it creates national prosperity, “trade [...] is supported by the vices and luxury of the age” (Vol. 2, p. 225). Here Defoe is concerned with forestalling moralists who were calling for “sumptuary laws for restraining habits, clothes, equipages, and expensive customs [...] because of the exorbitances of dress and the excesses of eating and drinking” (Vol. 2, pp. 225-26). While he encouraged moderation, Defoe did not impose his own beliefs on others, and he had a definite *laissez faire* attitude a half century before Adam Smith made it fashionable.

The book also includes much personal advice to the tradesman on litigation, partnerships, excessive pleasures and expenses, servants and apprentices and even marriage. He thought there was too much litigation (perhaps because he was the subject of so many civil suits). Defoe argues a “tradesman should avoid going to law for his right [...] because of the mischiefs of being litigious” (Vol. 2, p. 115). Those who persist in “wrangling in every bargain, disputing every trifle, and going to law for every dispute [...] should be presented as a public nuisance” (Vol. 2, p. 117) – another sentiment popular today.

Partnerships also presented dangers. “Some trades, such as mercers, linen drapers, banking, gold-smiths [...] are generally carried on in partnership; but trades of less business are carried on [...] single handed” (Vol. 1, p. 164). There were several concerns. The partner may be too “diligent” and take over the business, or he may be too “negligent” and not do his share of the work. Even worse “one partner may commit acts of bankruptcy without the knowledge of the other, and thereby subject the united stock [to loss]” (Vol. 1, p. 172). Defoe concludes: “if possible [a tradesman] should go on single handed in trade” (Vol. 1, p. 177). Defoe was somewhat jaded having faced litigation in his own business affairs on several occasions from former partners.

The businessman should take care to avoid excessive pleasures, such as “keeping horses [...] women [and] spending much time in the tavern” (Vol. 1, pp. 65-72). Also to be avoided is “immoderate expense in housekeeping [...] dress [...] company [...] and equipage” (Vol. 1, p. 73-75). Defoe, like other early writers, stressed that businessmen should lead a temperate lifestyle and avoid the evils of gambling, wenching, drinking and vanity.

Moreover, excessive pleasures and an immoderate lifestyle caused the tradesman to neglect business. There is “danger to a master [...] of [...] leaving his business to servants” (Vol. 1, p. 99). Not only are there problems with good apprentices and servants:

[...] when they are honest and diligent, faithful and industrious; what then when the business is left to idle, negligent, and extravagant servants. The first carry the customers away with them [when they set up their own shops], the last drive the customers away (Vol. 1, p. 103).

Thus, the tradesman must keep on top of his affairs.

There is advice on marriage, particularly: “The bad consequences of a tradesman marrying too soon” (Vol. 1, p. 87) because “A married apprentice will always make a repenting tradesman” (Vol. 1, p. 88). This is because there are always additional expenses: “furnishing the house [...] servants [...] and as children come on, more servants, maids and nurses” (Vol. 1, p. 93). On the other hand, later in life, in contrast to Scott (1635) who thinks a woman should be kept ignorant of the trade, Defoe suggests a wife become acquainted with the business. This is both “for her own sake” (Vol. 1, p. 217), in case she has to dispose of it after his death, and “for his children’s sake” (Vol. 1, p. 218); if she has a son who “not yet of age to take it up, she may keep the trade for him” (Vol. 1, p. 218) until he is ready.

In planning for retirement, Defoe discusses: “How the honest tradesman [...] [of] twenty years, or perhaps more [...] [now] a rich man [...] ought to govern himself, and guard against disasters” (Vol. 2, p. 86). After his trading career, “a rich overgrown tradesman” (Vol. 2, p. 133) “should convert his money into solid [property] rents [...] [and] prudent management and frugal living will increase any fortune” (Vol. 2, p. 136). As he proceeds to the “life of a gentlemen”, our tradesman passes “out of reach of our subject, which is principally directed to men in trade” (Vol. 2, p. 140). Nevertheless, Defoe offers some parting advice: “to come off clean [...] keep his reputation intact [...] leave no debts [...] and hold his face to the world” (Vol. 2, pp. 140-47). There is a last warning to the retiring tradesman of “the folly and the scandal of [...] being purseproud” (Vol. 2, p. 148), that is bragging about his fortune.

Defoe summarizes the progress of his book as having “conducted the English tradesman through the several progressions of his business, from his first setting out in the world, till his retiring from it, and commencing a gentlemen” (Vol. 2, p. 153). From start to finish, Defoe has described everything necessary for a novice to become a complete English tradesman, and in the process, he anticipated many modern marketing concepts.

Conclusions

There is a marked contrast between these early marketing textbooks written during the Age of Enlightenment and those of the present. The most obvious difference is the spiritual and religious component emphasized in the former and absent in the latter. This of course results from changes in the macro environment of business, in which the Age of Enlightenment served as an intellectual bridge from a medieval society dominated by religious and political upheavals to the more stable and secular-oriented world of the twenty-first century.

Although a religious and spiritual emphasis is not likely to be reintroduced into modern textbooks, honest and ethical dealings are making a comeback and finding a place in current business textbooks. Similarly, what was formerly known as political propaganda is now discussed as political or social or cause-related marketing. These trends are likely to accelerate in our apparently more politicized and less morally refined secular world.

From a pedagogical standpoint, textbooks of the past placed more emphasis on the immediately practical and useful such as facts and data, with less stress on enduring managerial principles (except those of a spiritual and ethical nature), compared to books of the present. Of course, in earlier times, there was less available knowledge of enduring managerial principles. Nevertheless, the books discussed many marketing principles as

well as advice on all aspects of the marketing mix. Of course, there was often less freedom of action for managerial decision making. Product quality and prices were often regulated by the guilds or by civil authority. Advertising and promotion were also disdained by the guilds and in many professions.

Furthermore, there were far fewer marketing tools available. In advertising, for example, the media in earlier times consisting mainly of criers, handbills, broad signs, graffiti and shop signs were limited, to say the least, compared with today's newspapers, magazines, billboards, bulletin boards, sign panels, neon signs, direct mail, telemarketing, radio, television and internet. Similarly, transportation in earlier times was restricted to human and animal muscle power, small sailing boats, two-wheeled carts and four-wheeled wagons, in contrast to modern trucks and trailers, railroads, supertankers and container freighters, pipelines and airplanes.

In the sixteenth century, when Brown was writing the *Marchant's Avizio*, the world was a much slower, more manually operated, closer knit and family-oriented place, still dominated by agriculture rather than manufacture or trade. By the eighteenth century, in Defoe's time, England was at the early dawn of the Industrial Revolution and was described by Smith (1776, 1937, p. 579) as "a nation of shopkeepers". It is not surprising, therefore, that these early books of marketing instruction appear quaint to a sophisticated modern reader. Despite their limitations, however, these early manuals on business served their intended purpose. As a useful adjunct to on-the-job training, early textbooks provided novice readers of the past – just like their modern academic counterparts – with educational lessons in marketing.

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About the author

Eric Shaw is an Emeritus Professor of Marketing at Florida Atlantic University. He teaches PhD seminars in his major research interests: the history of marketing thought and the development of marketing theory. He also studies marketing strategy, decision making, conceptualizing and measuring marketing system performance, as well as doing research in general systems and complex adaptive systems. He has published numerous articles, book chapters and monographs; he is an Associate Editor of the *Journal of Historical Research in Marketing* and serves on several editorial review boards. Eric Shaw can be contacted at: shaw@fau.edu

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