

Historical Research in Marketing: Literature, Knowledge, and Disciplinary Status

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Historical research in marketing consists of a body of literature and specific norms regarding knowledge generation and presentation. Marketing academics have published historical studies in marketing journals since the 1930s, but over the past thirty years associational activities have greatly stimulated the growth of the literature, although it remains less developed than history subfields in accountancy, management, business, and economics. Historical studies published in mainstream marketing journals have favored explicit literature reviews, data borrowing, multiple types of primary sources, and transparency in research methods. We conclude with an assessment of marketing historiography as a legitimate discipline in its own right but with future challenges.

Marketing as an academic field emerged in the early twentieth century as a branch of applied economics strongly influenced by German historical economics.¹ The earliest university teachings of marketing in North America and Britain are traced to the 1902–3 school year, when the Universities of Illinois, Michigan, and California in the United States and the University of Birmingham in the UK offered the first courses in distribution.² The term “marketing” began to be used in both course and book titles a few years later, and a handful of general marketing texts had appeared in print by 1920.³ The first scholarly journals on the subject, the *American Marketing Journal* and the *National Marketing Review*, started publication in January 1934 and with the summer 1935 issue, respectively. In July 1936 these two quarterlies merged to form the *Journal*

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of Marketing. Their sponsoring organizations, the American Marketing Society and the National Association of Marketing Teachers, also united to form the American Marketing Association on January 1, 1937.⁴ With these consolidations, both a sustainable major publication outlet and a strong academic association had been formed. Thus, after three decades of development, a field meeting the standards of a true academic discipline had finally come to fruition.⁵

The purpose of this article is to explore historical research in marketing as a subfield of its own and how it has progressed within a larger marketing discipline strongly influenced from the outset by the quantitative social sciences, especially economics and social psychology, and from the 1960s heavily slanted toward a micromanagerial perspective.⁶ We will briefly survey the growth of this historical literature and the key events that produced it and show how it compares to the related history fields in management, accounting, business, and economics. We will then describe how the processes of collecting and analyzing data and writing marketing history in order to adapt to the accepted strategies of knowledge generation favored by the parent field have developed qualities different from much conventional narrative and business history. Finally, we will assess historical writing in marketing in terms of its present disciplinary status and future prospects.

Historical Research in Marketing: The Literature

Historical research in marketing is usually divided into two major areas or subtopics: marketing history and history of marketing thought. The former includes the study of the history of marketing practices, such as advertising campaigns and retailing formats, as well as the history of consumption and consumer culture. In fact, advertising history and retailing history are undoubtedly the most popular topics studied within the broader area of marketing history. Marketing history is usually approached from the perspective of firms and industries but also from a macroperspective or even entire economies, as in the history of aggregate consumption patterns. The history of marketing thought is the study of ideas about marketing practices: how these ideas develop over time through changing professional networks of marketing thinkers and within larger social and cultural contexts. It usually focuses on concepts, theories, or schools of thought.⁷ The history of marketing thought has also included studies of organizations, bodies of literature, and biographies of individual contributors.⁸

Origin and Growth of a Historical Literature in Marketing

Those scholars now recognized as the earliest to study and teach marketing were trained as economic historians.⁹ They used history as a methodology for developing marketing principles; that is, history informed what they studied and taught but was not the end goal of their scholarship. The conception and development of marketing thought later became a scholarly concern of the *Journal of Marketing* starting with its second issue, featuring James E. Hagerty's "Experiences of Our Early Marketing Teachers" in 1936, and revisited just a few years later with H. H. Maynard's "Marketing Courses Prior to 1910" and Louis D. H. Weld's "Early Experiences in Teaching Courses in Marketing," both published in 1941, and Maynard's "Early Teachers of Marketing," published in 1942.¹⁰ These four articles, based on the authors' personal experiences, recounted some of the first experiences teaching college marketing and its challenges in the early twentieth century. Teaching and thought development were interrelated. The introduction of new marketing classes to university curricula stimulated the codification of marketing concepts, perhaps first in lecture notes, then in pamphlets and books, and eventually in journal articles.

The second issue of the *Journal of Marketing* also included J. M. Cassel's "The Significance of Early Economic Thought on Marketing" and Fred Mitchell Jones's "Retail Stores in the United States, 1800–1860," indicating that the editor and review board appreciated histories of marketing thought, as well as accounts of marketing institutions and practices.¹¹ In 1951 an article by Robert Bartels, "Influences on the Development of Marketing Thought," became a key part of the most significant body of intellectual history in marketing ever written by a single individual.¹² Drawn from Bartels's doctoral dissertation, the article led to the classic *The Development of Marketing Thought*.¹³ After Bartels's signal work, little was published on the history of marketing or marketing thought for over twenty years. However, as will be explained below, the volume of this stream of research increased rapidly after the early 1980s.

Table 1 shows the cumulative number of publications by decade of historical research in marketing since 1900 as listed in the Google Scholar database, which includes peer-reviewed papers, theses, books, abstracts, and articles from academic publishers, professional societies, reprint repositories, universities, and other scholarly organizations. Using the search phrases indicated in table 1 yielded a cumulative 5,875 entries for historical research in marketing from 1900 through August 3, 2015. Patents and citations were excluded from these searches. The actual

Table 1
Cumulative Volume of Historical Research in Marketing

1900 to	Marketing history	Retailing history	Advertising history	Total columns 2, 3, 4	History of marketing thought	Grand total
1940	10	1	14	30	0	30
1950	20	1	23	44	0	44
1960	42	2	28	72	0	72
1970	57	4	43	104	0	104
1980	92	9	94	195	7	202
1990	211	22	201	434	66	500
2000	530	60	390	980	177	1,157
2010	1,570	149	994	2,713	646	3,359
2015	2,370	216	1,480	4,066	1,010	5,076

Source: Google Scholar database accessed March 7, 2015. In columns 2, 3, 4, and 6 the search term was simply the field name (e.g., “marketing history”). Patents and citations were excluded from the Google Scholar searches.

amount of research activity may be understated, since some authors did not always use these particular phrases in their publications. For example, numerous studies published in the *Journal of Marketing* during the 1930s and 1940s on the origins of the discipline are not registered in searches of the Google Scholar database. Nonetheless, the data indicate rapid growth in the literature beginning in the 1980s.

The growth in historical research since 1980 stimulated the publication of occasional overviews of this literature. For instance, Jones’s chapter on historical research in marketing covered most publications prior to 1980.¹⁴ An article by Jones, Eric Shaw, and Deborah Goldring included a content analysis of the 445 papers presented at the biennial Conference of Historical and Analysis and Research in Marketing (CHARM) from 1983 to 2007 and traced the impact of CHARM on publishing activity in marketing history more generally.¹⁵ Jones and Shaw reviewed the strong record of the *Journal of Macromarketing* in publishing historical research from its inception in 1981 through its silver anniversary in 2006.¹⁶ And more recently, the *Journal of Marketing Management* celebrated its thirtieth anniversary of publication with a review of the historical literature focusing on marketing management.¹⁷ This growth

in historical research in marketing has been influenced by a number of key events, which we will now discuss.

Key Events in the Development of the Literature

The literature of any academic field results from more than just the sum of efforts of individual researchers. It is greatly influenced by professional interactions, social networks, and formal associations among scholars who form and support outlets for publication. One explanation for the slow growth of historical writing in marketing before 1980 is a lack of such institutionalization. During the first eighty years of academic marketing in North America, we have found no evidence of sustained association activities among marketing scholars interested in the history of their field and its ideas. History was important to some writers, especially members of the founding generation such as Hugh E. Agnew, Paul D. Converse, James E. Hagerty, Fred Mitchell Jones, Simon Litman, H. H. Maynard, and Louis D. H. Weld, but they apparently did not organize around their interest in history.¹⁸ This is not so unusual. Before 1970 the marketing discipline in general had relatively few distinctive subareas outside of traditional advertising and retailing.¹⁹ For example, the now-sizeable field of consumer research did not organize its Association for Consumer Research until 1969 or launch its first major outlet, the *Journal of Consumer Research*, until 1974.

This situation changed in 1983, when the first North American Workshop on Historical Research in Marketing—now known as the Conference on Historical Analysis & Research in Marketing (CHARM)—was held at Michigan State University. Stanley C. Hollander, a well-known retailing theorist and historian, and Ronald Savitt, who had just published an important paper on historical research methods, organized this meeting.²⁰ CHARM has met biennially ever since. From the seventeen conferences held beginning in 1983, 542 papers and 71 abstracts have been published in the CHARM proceedings. In the early 1990s CHARM became a major contributor of content to the *Journal of Macromarketing (JMK)*. Since its first special issue on marketing history in 1994, *JMK* has made marketing history one of its major subject areas. From 1994 through 2005 historical articles accounted for 61 of the 137 full articles published in *JMK*, representing fully 45 percent of that journal's content.²¹ Most of those articles were first presented at a CHARM conference.

Other initiatives include tracks on historical research in marketing at a 1985 Association for Consumer Research conference and at a 1988 American Marketing Association conference. The macromarketing

group, which organized its first annual conference in 1976, frequently has included a history track in its annual meetings. In 1990 the *Journal of the Academy of Marketing Science* published a special issue on the history of marketing thought. All but one of those articles was originally a paper presented at CHARM. Other journals to feature special issues on marketing history include *Psychology & Marketing* in 1998, *European Business Review* in 2007, and *Marketing Theory* in both 2005 and 2008.²² The John W. Hartman Center for Sales, Advertising & Marketing History, established at Duke University in 1992, has twice hosted CHARM meetings and has become the major repository for marketing archives in the United States. Through its fellowships, the Hartman Center has funded historical research that has found its way into marketing journals.

In Britain the History of Advertising Trust was established in 1976, and it continues to be a major archive of advertising history. A year later the *Journal of Advertising History* was founded but ceased publication in 1988.²³ The University of Reading hosted marketing history conferences in 1991 and again in 1993. Papers from these two meetings appeared in *The Rise and Fall of Mass Marketing*.²⁴ The strong interest in marketing history in Britain is further evident in the formation in 1998 of the Centre for the History of Retailing and Distribution (CHORD) at the University of Wolverhampton. CHORD hosts an annual conference and numerous workshops. However, this group is based within a school of humanities, languages, and social sciences; focuses on retailing rather than the full breadth of marketing topics; and has offered joint programs with business and economic historians. Finally, the Museum of Brands, Packaging, and Advertising opened in London's Notting Hill area in 2005.²⁵ In addition to its permanent collection of ephemera and artifacts, it sponsors lectures and school outreach programs.

In 1986 at Michigan State University, Stan Hollander started distributing a newsletter, *Retrospectives in Marketing*, about marketing history and the history of marketing thought. Hollander, a very important and deservedly honored champion of historical research in marketing, called repeatedly for more historical research and encouraged his younger colleagues to form a professional organization.²⁶ In 2001 a new body was finally founded (although not legally incorporated) with officers, by-laws, and a small bank account. Originally called the Association for Historical Research in Marketing, it has since been retitled as simply the CHARM Association. An association website, now available at www.charmassociation.org, was built soon thereafter. In addition to providing information on the biennial conference, the website makes available past issues of *Retrospectives in Marketing* and free PDF copies of all papers from past proceedings, as well as other research resources for marketing historians.

After the 2007 CHARM meeting, a group led by D. G. Brian Jones submitted a proposal for a new marketing history journal to Emerald Publishing, and in July 2007 Emerald agreed to underwrite the *Journal of Historical Research in Marketing (JHRM)* with Jones as the founding editor. *JHRM* is now in its seventh year of publication. In 2015 Routledge launched the newest academic periodical to feature historical research in marketing—*History of Retailing and Consumption*—and in 2016 will publish a volume of essays, the *Companion to Marketing History*, edited by Brian Jones and Mark Tadajewski. Tadajewski and Jones are also co-editing a new book series, Routledge Studies in Marketing History, and at this writing four books on marketing and consumption history are in the pipeline. In 2014 another Routledge book series, Studies in the Growth Economies of Asia, published Kasuo Usui's history, *Marketing and Consumption in Modern Japan*.²⁷

Marketing History Literature Compared to Related History Fields

One way to understand the growth of the marketing history literature is to compare it with the literature of the related fields of management, accounting, business, and economics history. Table 2 shows that marketing history has just one specialist journal (another forthcoming in 2015) compared with two for management, three each for accounting and business, and at least four for economic history. The number of WorldCat catalog, Google Scholar, and Google listings for marketing history are far smaller than those of the other fields. Business and economic history are broad, well-established areas, but what is particularly surprising is how much further developed are the fields of accounting history and management history. As Alan J. Richardson describes, accounting historians have been successful at making their work relevant and legitimate within their larger field through educational initiatives, standard setting, and institutional memory projects.²⁸ Their work has generated controversy and visibility through studies of accounting heroes, such as the founding icon Renaissance Friar Luca Pacioli, and villains, such as the auditors of Enron. Finally, accounting academics have diligently institutionalized their social networks and publication outlets.

Historical Research in Marketing: Knowledge Generation

The majority of historical research presented and published within the marketing field in recent decades has had one or more of the following characteristics: (1) the inclusion of an explicit literature review, (2) an emphasis on secondary data sources and “data borrowing,”

Table 2
State of Development of Marketing History versus Related History Fields

History field	Current journals (first publication)	WorldCat listings	Google Scholar listings	Google listings
Marketing history	<i>Journal of Historical Research in Marketing</i> (2009)	2,871	3,490	232,000
Management history	<i>Management & Organizational History</i> (2006) <i>Journal of Management History</i> (1995)	12,828	19,600	382,000
Accounting history	<i>Accounting Historians Journal</i> (1973) <i>Accounting History</i> (1990) <i>Accounting History Review</i> (1996, formerly <i>Accounting, Business & Financial History</i>)	6,105	7,600	159,000
Business history	<i>Business History</i> (1926/1954) <i>Business History Review</i> (1926) <i>Enterprise & Society: The International Journal of Business History</i> (2000)	57,839	82,400	630,000
Economic history	<i>European Review of Economic History</i> (1997) <i>Explorations in Economic History</i> (1963) <i>Journal of Economic History</i> (1940) <i>Journal of the History of Economic Thought</i> (1978)	786,938	770,000	6,710,000

Note: The journals identified are limited to those in English. All numbers accessed on March 7, 2015. In each column the search term was simply the field name (e.g., "marketing history").

Source: Search of WorldCat catalog via <http://worldcat.org/>. For Google Scholar listings, patents and citations were excluded from the searches.

(3) the use of multiple types of primary sources, and (4) methodological transparency.

This particular model of knowledge generation and presentation has undoubtedly been influenced by the fact that many of the researchers and writers in marketing history have not been trained historians but rather academics holding doctorates from schools of business and sometimes from other social science fields, including anthropology, economics, and psychology. Mainstream marketing academics generally have been exposed if not totally converted to a positivistic, “scientific” philosophy. Most have a strong background in quantitative methods. Those who prefer qualitative research, which has developed a considerable following in the area of consumer culture theory, also pay close attention to methodological issues and rigor if they aim for top journals.²⁹ In addition, until the launch of the *Journal of Historical Research in Marketing* in 2009, marketing historians had to publish their work in mainstream marketing periodicals, since no journal was dedicated exclusively to publishing historical research in marketing. We believe the training of academics in marketing, plus the expectations of marketing journal editors, reviewers, and other gatekeepers, has produced historical writing that frequently incorporates existing models and rhetoric of marketing scholarship.

Explicit Literature Reviews

Unlike the typical article in the social sciences, and this definitely includes publications in marketing and consumer research, papers written by professional historians often proceed without a separate section that integrates previous work on the subject into the body of the text. The commitment is to the study of individual facts, the events, institutions, and personalities that have historical significance, rather than to the discovery of broad conceptual constructs. These historians believe that each period contains its own reasons why events occurred and that these causes are usually not generalizable.³⁰ This is not to say that historians ignore prior findings and interpretive essays but just that their research philosophy and narrative structures do not always lend themselves to the kind of presentation that first “plugs into” existing literatures, theoretical perspectives, and research traditions. When included, such material is usually placed in footnotes, a hallmark of the rhetoric of history. This lack of explicit research “positioning” can be frustrating to marketing journal editors and reviewers accustomed to the social science tradition. It makes historical research seem atheoretical, which it frequently is, and consequently irrelevant to the accumulation of knowledge, which it is not.

Thus, historical writing published in marketing journals usually provides a review of relevant literatures broken out into one or more separate sections. A few studies have tested a particular theory, and some even posit explicit hypotheses.³¹ Good examples of this positivistic stance are the theoretically driven, advertising content analyses of Russell W. Belk and Richard Pollay, Barbara L. Gross and Jagdish N. Sheth, and Lisa Baillargeon and Patrice G elinas, where finding loose theoretical ends preceded developing hypotheses about the past.³² Qualitative marketing history, such as the article by Yuko Minowa, Olga Khomenko, and Russell W. Belk on Valentine's Day gift giving in Japan and by Ross Petty on the codevelopment of trademark law and brand advertising, also frequently includes explicit literature reviews.³³ Whereas the more quantitative and positivistic studies will typically develop explicit hypotheses from the literature, those deploying qualitative and interpretive methods use the literature review to increase theoretical understanding and to inform data collection.

Data Borrowing

For many years, scholars in marketing, above all those specializing in consumer research, have imported theoretical ideas and empirical findings from economics, psychology, sociology, anthropology, and other social sciences. Thus, when investigating historical topics, they have naturally turned to the enormous body of existing historical research, gleaning whatever could be found relevant to marketing and consumption. As a consequence, much writing about marketing's past has emphasized secondary rather than primary sources. The historical era being investigated has influenced the ratio of primary to secondary sources. The enormous amount of archival and other materials that document marketing practice and thought since the latter part of the nineteenth century has encouraged the use of primary data. For earlier periods, original evidence is often much less abundant, scattered across numerous records, and sometimes quite difficult to locate. In many cases it would be redundant for marketing historians to make the time-consuming effort to reanalyze the same primary sources that others have combed. And the direct expenses and opportunity costs accrued traveling to archives, libraries, and collections can be considerable. A great deal of historical research from fields as diverse as women's studies to material culture remains to be read, reinterpreted, and incorporated into the body of marketing history.³⁴ This is not to say that marketing historians in business schools ignore primary data sources but rather

that they lean more toward data borrowing than would business and economic historians housed in other university departments.

Multiple Types of Primary Sources

In their use of primary evidence, marketing history scholars have been rather eclectic, drawing upon data in the form of words, numbers, images, artifacts, and memories elicited through oral history methods.³⁵ A particular piece of evidence can straddle more than one category. Print advertising, one of the most frequently consulted primary sources in marketing history, and related promotional ephemera, such as packaging and store displays, often include both text and visuals.³⁶ Paintings, which can be an excellent data source for studying past consumption, are visual images but also material objects, often with provenance, a history of sales and ownership that may influence how they are interpreted in the present.³⁷ The type of project determines the kind and mix of primary sources. Whereas marketing and consumer histories draw from all kinds of data, biographies of leading academics and histories of marketing thought are largely based upon written sources, although they too have been supplemented by oral history interviews and photographs.³⁸ Collecting different sources, both within and across categories, is highly desirable. Words, images, artifacts, and oral histories can clarify, validate, and sometimes dispute each other, leading to a deeper, more nuanced view of marketing history. Utilizing multiple methods is standard procedure in contemporary ethnographic and other forms of qualitative marketing and consumer research. Facility with this approach can be transferred to researching historical topics.

Methodological Transparency

Professional historians are sometimes cavalier about explaining their data sources and analytical methods. Of course, they value archival materials as primary sources, and their use is carefully cited but usually not explicitly discussed. For example, the following sentence from Roland Marchand's "The Fitful Career of Advocacy Advertising" is as close as this article comes to a methods statement: "A historical survey of some early advocacy campaigns will reveal both the variety of experiments within this advertising mode and the ways in which earlier practitioners tried to deal with the problems that still beset the genre."³⁹ Marchand never explains what he means by the term "a historical survey." His text does not describe his sample of ads nor say how they were interpreted,

although his references do suggest he consulted several archival collections. Marketing historian Ron Savitt describes Fernand Braudel as “probably the most important economic historian of the twentieth century” but laments Braudel’s failure to present a clear description of his historical reasoning and methodology.⁴⁰ Business historians in particular “are not usually expected to produce a methodological justification for their work.”⁴¹ Other historians are more explicit but often relegate their descriptions of archival sources to footnotes or bibliographic essays.⁴² Rarely do we get from business historians a discussion of methodological issues such as the following by Daniel Robinson, who expressed caution about using advertisements as source material: “Although notable sources for illuminating popular culture, advertisements pose methodological and conceptual challenges. . . . [H]istorians should be wary of treating ads as ‘culturally self-evident artifacts that are instantly legible to the viewer in a specific and unequivocal way.’ They should be analyzed in conjunction with other types of evidence, and their interpretative limitations should be recognized.”⁴³

Historical writing for marketing journals, not to mention social science research in general, needs to be transparent about methods.⁴⁴ Data sources and their selection should be carefully described, along with the plan for their analysis. A good example of one such methods section can be found in Ronald A. Fullerton’s important study “How Modern Is Modern Marketing?,” in which he first discusses the philosophical support for his historical approach, including the rationale for a cross-national investigation, and then describes his sample of primary and secondary sources.⁴⁵ Fullerton was not just writing a narrative history but scrutinizing a marketing theory, the so-called (and highly problematic) production era concept inspired by Robert J. Keith.⁴⁶ The more recent studies mentioned above by Baillargeon and Gélinas, by Minowa, Khomenko, and Belk, and by Petty all have separate sections on samples, data sources, and methods.

Historical Research in Marketing: Disciplinary Status

The term “discipline” as used in academia has various connotations, mostly positive.⁴⁷ It refers both to a bounded body of knowledge and to the specialized training and accepted methodologies necessary for producing that knowledge. Thomas S. Kuhn describes a “disciplinary matrix” consisting of four elements: (1) symbolic generalizations (theories or conventional wisdom), (2) metaphysical paradigms (beliefs in specific models), (3) values (what is considered important), and (4) exemplars (the best examples students learn in texts and from the periodical

literature).⁴⁸ Michel Foucault refers to an academic discipline as “a system of control in the production of discourse” and stresses the important role exercised by gatekeepers.⁴⁹ Alan Richardson defines an academic discipline as “the organizational and cognitive structure of academic knowledge.”⁵⁰ In his view, disciplines have institutional, cognitive, and psychological components. As institutions, disciplines create specialist journals, hold regular conferences, and form academic associations. Cognitively, they exist as a bounded body of knowledge, controlled by peer review, within larger systems of knowledge. The psychological component of a discipline is comprised of a critical mass of scholars who self-identify as members of the discipline. All of these writers agree that disciplines are socially produced and resolutely defended and promoted by scholarly groups resembling “tribes.”⁵¹

In 1989 Stan Hollander referred to marketing history (broadly defined) as the “emerging discipline” and then again in 1993 as a “sub-discipline” of marketing.⁵² He noted that during the 1980s a new enthusiasm and a new approach were emerging within historical research in marketing. In their 1994 *Journal of Macromarketing* special issue pre-view, “Toward a Circumscription of Marketing History: An Editorial Manifesto,” Terence Nevett and Hollander again describe the field as a “subdiscipline.” This article goes on to identify core interests and issues of marketing history in terms of scope, mission, truth, and accuracy, as well as chronological, geographical, and intellectual limits.⁵³ More recently, Eric Shaw and Brian Jones have suggested that marketing history is one of twelve schools of thought within the broader marketing discipline.⁵⁴ But does marketing historiography truly meet a disciplinary test?

Following Richardson’s three criteria, historical research in marketing has an institutional infrastructure, a bounded knowledge, and a devoted following of practitioners who self-identify as marketing historians. Institutionally, two separate academic associations represent the field, CHARM and CHORD, each scheduling regular conferences on or closely related to marketing history. Historical research has been supported by panels, sessions, and tracks at meetings of various marketing and consumer research associations and through publications in special issues in at least four marketing journals. The most mainstream and prestigious journals in marketing—the *Journal of Marketing*, *Journal of Marketing Research*, and *Journal of Consumer Research*—occasionally have published history articles.⁵⁵ Furthermore, as institutions, disciplines create specialist journals, and the *Journal of Historical Research in Marketing* may be the most concrete evidence of an institutional infrastructure. Historical research in marketing has developed a literature for an area of knowledge with sufficient scope and depth to now support, as

mentioned previously, two journals, edited volumes, and a book series dedicated to publishing work in this area. Epistemological questions and methodological issues in marketing history have been addressed from several points of view.⁵⁶ Self-identified marketing historians are a small group, but they are enthusiastic enough to have sustained the biennial CHARM since 1983. Thus, we believe historical writing in marketing meets the minimal standards of an academic discipline.

Nevertheless, future prospects are clouded with abundant challenges. In general, the overall marketing field, especially in North America, remains a discipline heavily slanted toward theoretically driven, quantitative research ostensibly relevant to management. The big dog has not held its history pup in especially high regard. Even the *Journal of Macromarketing*, a publication that has long included articles, special sections, and special issues on marketing history, has only once since 1986 granted its annual Charles C. Slater Award for best article to a historical piece.⁵⁷ In US parlance, the phrase “that’s history” means something is largely irrelevant, of minor import, and perhaps best forgotten. In contrast, there appears to be greater interest in marketing history among European marketing academics for whom “that’s history” usually has a much different, more serious meaning. Thus, the 2009 CHARM was held for the first time ever outside of North America at the University of Leicester in the UK. The 2013 CHARM was held at the Copenhagen Business School, and, going forward, every other biennial meeting will be held abroad, starting with Liverpool John Mores University in 2017. This is a deliberate strategy by the CHARM Association to broaden the scope of historical research in marketing and to build linkages among history interests in Europe and in North America.

Following the example of accounting historians, marketing historians need to do a better job convincing their colleagues that more history should be taught to undergraduates and especially to PhD students, who generally have learned little about historical research methods.⁵⁸ One problem, however, is that even if a marketing professor wanted to teach a class in history, no text has been written that covers the entire field of the history of marketing and marketing thought. Book-length treatments exist, but these histories are not fully comprehensive and usually have been written by people outside academic marketing.⁵⁹ Wider interest in marketing history needs to be created, perhaps through generating controversy. Public criticism of the shallow and frequently misleading history that does occur in introductory textbooks could serve as a starting point. Like accounting, marketing has its share of heroes and villains, whose biographies should be widely disseminated.

Conclusion

Historical research in marketing has established an intellectual record since 1936, but only since 1983 has the field institutionalized itself with regular conferences, formal associations, newsletters, websites, a dedicated section in a respected marketing journal, special issues of other good journals, and a successful journal of its own. Partnerships with research centers exist in the United States and the UK. The field is not as well developed as cognate areas in business and economics but arguably has become a true discipline in its own right, with reasonably distinct methods of knowledge generation and presentation heavily influenced by the training and expectations of the parent academic field. Thus, trends are in the right direction for historical writing in marketing, but a successful future is not preordained, and so this generation of marketing history scholars must ensure that further steps are taken to promote and institutionalize their research interests.

Notes

1. D. G. Brian Jones and David D. Monieson, "Early Development of the Philosophy of Marketing Thought," *Journal of Marketing* 54 (January 1990): 102–13.

2. Robert Bartels, *The Development of Marketing Thought* (Homewood, IL: Richard D. Irwin, 1962); Simon Litman, "The Beginning of Teaching Marketing in American Universities," *Journal of Marketing* 15 (October 1950): 220–23; D. G. Brian Jones and Mark Tadajewski, "Origins of Marketing Thought in Britain," *European Journal of Marketing* (forthcoming).

3. In his research on early publications of the American Economics Association, Bussière found that the term "marketing" was being used in a manner consistent with current practice as early as 1897. Lazer found the term used similarly at least as early as 1856 in *Webster's American Dictionary*, and Shaw traced "marketing" back to 1561. See Dave Bussière, "Evidence of a Marketing Periodic Literature within the American Economic Association: 1895–1936," *Journal of Macromarketing* 20 (December 2000): 137–43; William Lazer, "Some Observations on the Development of Marketing Thought," in *Conceptual and Theoretical Developments in Marketing*, ed. O. C. Ferrell, Stephen Brown, and Charles W. Lamb Jr. (Chicago: American Marketing Association, 1979), 652–64; and Eric H. Shaw, "The First Dialogue on Macromarketing," *Journal of Macromarketing* 15 (June 1995): 7–20. For information on early marketing texts, see Paul D. Converse, "The First Decade of Marketing Literature," NATMA Bulletin Supplement, November 1933, 1–4.

4. Hugh E. Agnew, "The History of the American Marketing Association," *Journal of Marketing* 5 (April 1941): 374–79; Paul D. Converse, "Notes on the Origin of the American Marketing Association," *Journal of Marketing* 17 (July 1952): 65–67.

5. The marketing subfields of advertising and retailing can be considered disciplines in their own right. Advertising teaching also began at the turn of the twentieth century, and this field got an intellectual jump on marketing thanks to the publication of Walter Dill Scott's *The Theory of Advertising* (Boston, 1903) and *The Psychology of Advertising* (Boston, 1908). Both books are available at <http://books.google.com>. The first regularly published outlet for retailing scholars, the *Journal of Retailing*, commenced in April 1925.

6. A new definition of marketing announced by the American Marketing Association (AMA) in 2004 is perceived by many prominent scholars to be biased toward management to the exclusion of topics in marketing and society. This controversy led to special sessions at the 2005 Marketing and Public Policy Conference, the 2006 AMA Winter Educators' Conference, and the 2007 AMA Summer Educators' Conference. Passionate commentary on this definition and on the nature of marketing also has appeared in other forums, including a special section of the *Journal of Public Policy & Marketing*. See Gregory T. Gundlach, "The American Marketing Association's 2004 Definition of Marketing: Perspectives on Its Implications for Scholarship and the Role and Responsibility of Marketing in Society," *Journal of Public Policy & Marketing* 26 (Fall 2007): 243–50.

7. Eric H. Shaw and D. B. Brian Jones, "A History of Schools of Marketing Thought," *Marketing Theory* 5 (September 2005): 239–82; William L. Wilkie and Elizabeth S. Moore, "Scholarly Research in Marketing: Exploring the '4 Eras' of Thought Development," *Journal of Public Policy & Marketing* 22 (Fall 2003): 116–46; Kazuo Usui, *The Development of Marketing Management: The Case of the USA c. 1910–1940* (Aldershot, UK: Ashgate Publishing Limited, 2008).

8. Agnew, "The History"; Harold W. Berkman, "Twenty Years of the Journal," *Journal of the Academy of Marketing Science* 20 (Fall 1992): 299–300; E. T. Grether, "The First Forty Years," *Journal of Marketing* 40 (July 1976): 63–69; Roger Kerin, "In Pursuit of an Ideal: The Editorial and Literary History of the *Journal of Marketing*," *Journal of Marketing* 60 (January 1996): 1–13; James A. Muncy, "The *Journal of Advertising*: A Twenty Year Appraisal," *Journal of Advertising* 20 (December 1991): 1–12; D. G. Brian Jones, "Simon Litman (1873–1965): Pioneer Marketing Scholar," *Marketing Theory* 4 (December 2004): 343–61; Jones, "Theodore N. Beckman (1895–1973): External Manifestations of the Man," *European Business Review*, March 2007, 129–41.

9. Jones and Monieson, "Early Development"; Jones and Tadjajewski, "Origins."

10. James E. Hagerty, "Experiences of Our Early Marketing Teachers," *Journal of Marketing* 1 (July 1936): 20–27; H. H. Maynard, "Marketing Courses prior to 1910," *Journal of Marketing* 5 (April 1941): 382–84; Maynard, "Early Teachers of Marketing," *Journal of Marketing* 7 (October 1942): 158–59; Louis D. H. Weld, "Early Experiences in Teaching Courses in Marketing," *Journal of Marketing* 5 (April 1941): 380–81.

11. J. M. Cassels, "The Significance of Early Economic Thought on Marketing," *Journal of Marketing* 1 (July 1936): 129–33; Fred Mitchell Jones, "Retail Stores in the United States 1800–1860," *Journal of Marketing* 1 (July 1936): 134–42.

12. Robert Bartels, "Influences on the Development of Marketing Thought," *Journal of Marketing* 16 (July 1951): 1–17.

13. See the 1962 and later editions of Bartels's *The Development of Marketing Thought*.

14. D. G. Brian Jones, "A History of Historical Research in Marketing," in *Marketing Theory*, ed. Michael Baker and Mike Saren (London: Sage Publications, 2010), 51–82.

15. D. G. Brian Jones, Eric Shaw, and Deborah Goldring, "Stanley C. Hollander and the Conferences on Historical Analysis & Research in Marketing," *Journal of Historical Research in Marketing* 1 (2009): 55–73.

16. D. G. Brian Jones and Eric H. Shaw, "Historical Research in the *Journal of Macromarketing*," *Journal of Macromarketing* 26 (December 2006): 178–92.

17. Mark Tadajewski and D. G. Brian Jones, "Historical Research in Marketing Theory and Practice: A Review Essay," *Journal of Marketing Management* 30 (2014): 1239–91.

18. See Agnew, "The History"; Converse, "The First Decade"; Hagerty, "Experiences"; Jones, "Retail Stores"; Litman, "The Beginning"; Maynard, "Marketing Courses"; Maynard, "Early Teachers"; and Weld, "Early Experiences."

19. According to Lehman, just eight marketing journals were established before 1970, and two of these, *Journal of Travel Research* (1962) and *Journal of Food Distribution Research* (1969), are arguably peripheral to mainstream marketing. Donald R. Lehman, "Journal Evolution and the Development of Marketing," *Journal of Public Policy & Marketing* 24 (Spring 2005): 137–42.

20. Ronald Savitt, "Historical Research in Marketing," *Journal of Marketing* 44 (Fall 1980): 52–58.

21. Jones and Shaw, "Historical Research."

22. The December 2008 special issue of *Marketing Theory* explored "marketing amnesia," the forgetting of the past and past literatures by the current marketing field. See Mark Tadajewski and Michael Saren, "The Past Is a Foreign Country: Amnesia and Marketing Theory," *Marketing Theory* 8 (December 2008): 323–38.

23. The *Journal of Advertising History* was resurrected by Sage UK in 2002 as the *Journal of Marketing History* but published only one issue.

24. Richard S. Tedlow and Geoffrey Jones, eds., *The Rise and Fall of Mass Marketing* (London: Routledge Library Editions, 1993).

25. Based on the personal collection of Robert Opie, the museum was originally housed in Gloucester from 1984 to 2001. See Michael Heller and Aidan Kelly, "Throwaway History: Brand Ephemera and Consumer Culture," *Journal of Macromarketing*, September 2015, 397–406.

26. See, for example, Stanley C. Hollander, "A Rearview Mirror Might Help Us Drive Forward: A Call for More Historical Studies in Retailing," *Journal of Retailing* 62 (Spring 1986): 7–10.

27. Kazuo Usui, *Marketing and Consumption in Modern Japan* (Abingdon, UK: Routledge, 2014).

28. Alan J. Richardson, "The History of Accounting History: Strategies in the Development of an Academic Discipline," plenary address to the Conference on Historical Analysis & Research in Marketing (CHARM), Duke University, May 2007; Richardson, "Strategies in the Development of Accounting History as an Academic Discipline," *Accounting History* 13 (August 2008): 247–80.

29. Russell W. Belk, ed., *Handbook of Qualitative Research Methods in Marketing* (Cheltenham, UK: Edward Elgar Publishing, 2006).

30. Fuat A. Firat, "Historiography, Scientific Method, and Exceptional Historical Events," in *Advances in Consumer Research*, vol. 14, ed. Melanie Wallendorf and Paul Anderson (Provo, UT: Association for Consumer Research, 1987),

435–38; Terence Nevett, “Historical Investigation and the Practice of Marketing,” *Journal of Marketing* 55 (July 1991): 13–23.

31. Ronald A. Fullerton, “How Modern Is Modern Marketing? Marketing’s Evolution and the Myth of the ‘Production Era,’” *Journal of Marketing* 52 (January 1988): 108–25; Stanley C. Hollander, “The Marketing Concept: A Déjà Vu,” in *Marketing Management Technology as a Social Process*, ed. George Fisk (New York: Praeger, 1986), 3–29; D. G. Brian Jones and Alan J. Richardson, “The Myth of the Marketing Revolution,” *Journal of Macromarketing* 27 (March 2007): 15–24.

32. Russell W. Belk and Richard Pollay, “Images of Ourselves: The Good Life in Twentieth Century Advertising,” *Journal of Consumer Research* 11 (March 1985): 887–97; Barbara L. Gross and Jagdish N. Sheth, “Time-Oriented Advertising: A Content Analysis of United States Magazine Advertising, 1890–1988,” *Journal of Marketing* 53 (October 1989): 76–83; Lisa Baillargeon and Patrice Gélinas, “Single- and Multi-Ideology Marketing in the Province of Quebec in the Early 20th Century,” *Journal of Macromarketing* 31 (March 2011): 32–43.

33. Yuko Minowa, Olga Khomenko, and Russell W. Belk, “Social Change and Gendered Gift Giving Rituals: A Historical Analysis of Valentine’s Day in Japan,” *Journal of Macromarketing* 31 (March 2011): 44–56; Ross D. Petty, “The Co-development of Trademark Law and the Concept of Brand Marketing in the U.S. before 1946,” *Journal of Macromarketing* 31 (March 2011): 85–99.

34. See, for example, Terrence H. Witkowski, “Marketing Thought in American Decorative Arts,” *Journal of the Academy of Marketing Science* 18 (Fall 1990): 365–68; Terrence H. Witkowski, “Data Sources for American Consumption History: An Introduction, Analysis, and Application,” in *Research in Marketing: Explorations in the History of Marketing (Supplement 6)*, ed. Jagdish Sheth and Ronald A. Fullerton (Greenwich, CT: JAI Press, Inc., 1994), 167–82.

35. Terrence H. Witkowski and D. G. Brian Jones, “Qualitative Historical Research in Marketing,” in Belk, *Handbook*, 70–82; Andrea Davies, “Voices Passed,” *Journal of Historical Research in Marketing* 3, no. 4 (2011): 469–85.

36. Examples of the use of advertising as a primary source include Belk and Pollay, “Images of Ourselves”; Gross and Sheth, “Time-Oriented Advertising”; Richard W. Pollay, “The Subsiding Sizzle: A Descriptive History of Print Advertising, 1900–1980,” *Journal of Marketing* 50 (April 1985): 18–36. The use of ephemera can be shown in Leighann C. Neilson, “The Remains of the Day: A Critical Reflection on Using Ephemera in Historical Research,” in *The Future of Marketing’s Past*, ed. Leighann C. Neilson (Long Beach, CA: Association for Historical Research in Marketing, 2005), 351–52.

37. Terrence H. Witkowski, “Re-gendering Consumer Agency in Mid-Nineteenth-Century America: A Visual Understanding,” *Consumption, Markets, and Culture* 7 (September 2004): 261–83.

38. Brian Jones, “William R. Davidson (1919–2012): A Pioneer in Retailing,” *Journal of Historical Research in Marketing* 5 (November 2013): 537–47.

39. Roland Marchand, “The Fitful Career of Advocacy Advertising: Political Protection, Client Cultivation, and Corporate Morale,” *California Management Review* 29 (Winter 1987): 128–56, quotation at 129.

40. Ronald Savitt, “Fernand Braudel on Historiography and Its Implications for Marketing History,” *Journal of Macromarketing* 20 (June 2000): 89–93, quotation at 89.

41. Charles Booth and Michael Rowlinson, "Management and Organizational History: Prospects," *Management & Organizational History* 1, no. 1 (2006): 5–30, quotation at 9.

42. See, for example, footnote 11 in Andrew Godley, "Selling the Sewing Machine Around the World: Singer's International Marketing Strategies, 1850–1920," *Enterprise & Society* 7 (June 2006): 266–314.

43. Daniel Robinson, "Marketing Gum, Making Meanings: Wrigley in North America, 1890–1930," *Enterprise & Society* 5 (March 2004): quotation at 7.

44. Booth and Rowlinson, "Management and Organizational History."

45. Fullerton, "How Modern Is Modern Marketing?"

46. Robert J. Keith, "The Marketing Revolution," *Journal of Marketing* 24 (January 1960): 35–38. Although Fullerton and others have found little evidence to support Keith's periodization, where the history of marketing is divided into "production," "sales," and "marketing" eras, it continues to be repeated in introductory marketing texts and is usually the only history of marketing students learn. See also Hollander, "The Marketing Concept"; and Jones and Richardson, "The Myth."

47. David R. Shumway and Ellen Messer-Davidow, "Disciplinarity: An Introduction," *Poetics Today* 12 (Summer 1991): 201–25.

48. Thomas S. Kuhn, *The Structure of Scientific Revolutions*, 2nd ed. (Chicago: University of Chicago Press, 1970), 182–87.

49. Michel Foucault, "The Discourse on Language," trans. Rupert Swyer, appendix to *The Archaeology of Knowledge* (New York: Pantheon Books, 1972), quotation at 224.

50. Richardson, "Strategies."

51. Tony Becher and Paul R. Trowler, *Academic Tribes and Territories: Intellectual Enquiry and the Culture of Disciplines*, 2nd ed. (Buckingham, UK: Open University Press, 2001).

52. Stanley C. Hollander, introduction to *Marketing History: The Emerging Discipline*, ed. Terence Nevelt, Kathleen Whitney, and Stanley C. Hollander (Lansing: Michigan State University, 1989), xix–xx, quotation at xix; Stanley C. Hollander, introduction to *Marketing*, vol. 1, ed. Stanley C. Hollander and Kathleen Rassuli (Brookfield, VT: Edward Elgar Publishing, 1993), xv–xxxiii, quotation at xvi.

53. Terence Nevelt and Stanley C. Hollander, "Toward a Circumscription of Marketing History: An Editorial Manifesto," *Journal of Macromarketing* 14 (Spring 1994): 3–7.

54. Shaw and Jones, "A History."

55. See, for example, Eminegül Karababa and Güliz Ger, "Early Modern Ottoman Coffeehouse Culture and the Formation of the Consumer Subject," *Journal of Consumer Research* 37, no. 5 (2011): 737–60.

56. Firat, "Historiography"; Ronald Fullerton, "Historicism: What It Is, and What It Means for Consumer Research," in Wallendorf and Anderson, *Advances in Consumer Research*, 14:431–34; Savitt, "Historical Research"; Ruth Ann Smith and David S. Lux, "Historical Method in Consumer Research: Developing Causal Explanations of Change," *Journal of Consumer Research* 19 (March 1993): 595–610; Witkowski and Jones, "Qualitative Historical Research."

57. Stefan Schwarzkopf, "The Consumer as 'Voter,' 'Judge,' and 'Jury': Historical Origins and Political Consequences of a Marketing Myth," *Journal of Macromarketing* 31 (March 2011): 8–18.

58. Wilkie and Moore contend that doctoral education in marketing has failed to properly transmit marketing knowledge, and, consequently, some of it has been lost. The *Journal of Historical Research in Marketing* now publishes an occasional section titled Teaching and Learning to identify and describe examples and encourage the teaching of marketing history and the history of marketing thought; see Stanley Shapiro, Teaching and Learning, *Journal of Historical Research in Marketing* 3, no. 4 (2011): 576–78, and 4, no. 2 (2012): 331–32; examples in that series include Shelby Hunt, “Doctoral Seminars in Marketing Theory: For Incorporating the History of Marketing Practice and Thought” *Journal of Historical Research in Marketing* 2, no. 4 (2010): 443–46; Christine Domegan, “The History of Marketing Thought: A Teaching Reflection,” *Journal of Historical Research in Marketing* 2, no. 4 (2010): 457–66; Ben Wooliscroft and Rob Lawson, “Teaching the History of Marketing Theory,” *Journal of Historical Research in Marketing* 2, no. 4 (2010): 467–78; Charles Ingene, “Retail Evolution: Historical Facts, Theoretical Logic and Critical Thinking,” *Journal of Historical Research in Marketing* 6, no. 2 (2014): 279–99; and Eric Shaw, “Teaching the History of Marketing Thought: An Approach,” *Journal of Historical Research in Marketing* 7, no. 2 (2015): 256–71. A recent three-volume set of readings on the history of marketing thought was edited by Tadajewski and Jones, making available the most comprehensive set of teaching (and reference) materials since the last edition of Bartels and of Sheth, Gardner, and Garrett. See William L. Wilkie and Elizabeth S. Moore, “Macromarketing as a Pillar of Marketing Thought,” *Journal of Macromarketing* 26 (December 2006): 224–32; Mark Tadajewski and D. G. Brian Jones, eds., *The History of Marketing Thought*, 3 vols. (London: Sage Publishing, 2008); Robert Bartels, *The History of Marketing Thought* (Columbus, OH: Gorsuch Scarisbrick Publishers, 1988); Jagdish N. Sheth, David M. Gardner, and Dennis E. Garrett, eds., *Marketing Theory: Evolution and Evaluation* (New York: Wiley, 1988).

59. See, for example, Susan Strasser, *Satisfaction Guaranteed: The Making of the American Mass Market* (Washington, DC: Smithsonian Books, 2004). Strasser’s book is required reading in Brian Jones’s undergraduate course in marketing history at Quinnipiac University. For a description of that course, see Stanley Shapiro, Teaching and Learning, *Journal of Historical Research in Marketing* 4, no. 2 (2012): 331–32.

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