Periodization in Marketing History: A Narrative in N Chapters Redux

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This paper was presented by Stanley C. Hollander as the “Founder’s Address” at the 11th Conference on Historical Analysis & Research in Marketing (CHARM). The paper explores some of the purposes, advantages, problems, and limitations of periodizing marketing history and the history of marketing thought, and concludes with observations about what the periodization process tells us about the status of marketing thought.

INTRODUCTION

Books are often divided into chapters. Stage plays are divided into acts and scenes. For somewhat analogous reasons, historians often periodize their narratives. Obviously, the historian does not have to meet the same physical requirements of stagehands and audience that influence the dramatist, but many of the same conceptual and literary considerations apply.

Periodization is the process of dividing the chronological narrative into separately labeled sequential time periods with fairly distinct beginning and ending points. Historical narratives may be organized in many ways. They may be divided technically, i.e. by subject matter as with Robert Bartels’ (1976) History of Marketing Thought. Histories may also be organized geographically so as to cover separate events in different venues. Nevertheless, within such frameworks the account of what actually happened will often be presented chronologically and thus may be subject to periodization. Stowe (1983) particularly notes that Bartels uses the idea of periodization for the various aspects of marketing thought, e.g., writings on marketing research, advertising, wholesaling, general marketing, and retailing. In fact, the editors of the American Historical Review refer to periodization as a fundamental tool for both teaching and research (Grossberg 1996).

History is the study of both continuity and change. It goes beyond mere chronology. It seeks to explain phenomena which are examined within their context. Thus, periodizations should mark important turning points in time. Periodization provides a number of cases, i.e. the individual time segments, that can be used for comparative analysis to identify similarities and differences between epochs. As Haydu (1998) points out, however, such comparisons are not a simple matter since they are subject to all of the complex methodological requirements for case independence and case similarity that apply to all other comparative analyses.

In this paper we explore some of the purposes, advantages, problems, and limitations of periodizing marketing history and the history of marketing thought. We reviewed a considerable number and wide range of available periodizations from both marketing and non-marketing sources with a view to considering the consistency and diversity as well as the appropriateness of some of the more popular versions. Tables 2 and 3 (see Appendix) summarize the sources from which these periodizations are drawn. Table 2 includes several stage theories which are distinguished from periodizations below, as well as histories with periodizations of a century or longer. Table 3 includes periodizations with shorter intervals, most a decade in length. We have included advertising histories, in part, because Stowe’s (1983) article, which serves as a starting point for this study, contrasted Bartel’s (1976) “General Marketing” and “Advertising” periodizations. More importantly,

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1 Professor Kathleen Rasulli and Professor Stanley C. Hollander started discussing this paper in 1996 and eventually presented a preliminary working paper at the 1997 Marketing History Conference prior to Kathleen Rasulli’s unfortunate death in an auto accident in January of 1999. At that time, Laura Dix was a graduate assistant to Kathleen Rasulli. Brian Jones assisted in the final revisions of the manuscript. Help was provided by an extraordinary group of undergraduate research assistants including Ellen Closs, Megan Closs, Melinda Bradley, Jessica Meyers, and especially Cheryl Hanson. Roger Dickinson of the University of Texas-Arlington has offered much help and suggestions, but should not be blamed for the final product. We are also indebted to Dr. Franklin Dewitt Platt, Professor Emeritus at Michigan State University.
much of the general public and at least some social scientists tend to treat advertising and marketing as fairly interchangeable terms. In general, however, the discussion ignores periodizations of the history of other sub-fields of marketing such as marketing research, supply chain management and wholesaling and retailing. Bucklin’s (1972) work, which takes a very broad view of wholesale and retail distribution, is an exception to the latter observation. For those sources in the Tables that are marked with the designation “exp” for “explicit”, the periodizations are in the author’s own words; “inf” is used to indicate that we have either modified the author’s terms to fit space limitations or inferred periodizations from easily observable chapter headings or textual context.

In the concluding segment of the paper we will try to offer some observations about what the periodization process, as it has been used, tells us about the status of marketing thought.

### Ex Post and Ex Ante Approaches

Writers who discuss historical methodology in marketing journals frequently like to present it as a field for deductive study in a more or less logical positivist tradition (Golder 2000; Savitt 1980). By way of contrast Nevett (1991), who feels that historical analysis is good training for market researchers, implicitly advocates an inductive approach that seeks a pattern in the data. Periodization can also be approached either inductively (ex post) or deductively (ex ante). Each approach presents a slightly different set of advantages, problems and limitations.

Most historians really are more comfortable with inductive methodologies and prefer to let the data speak for itself (Witkowski 2002, Kumcu 1987). Approached in this way, periodization is a device for summarizing research results and placing them in a presentation framework ex post. It is a framework for presenting material in the same sense as are articles in scholarly journals, chapter headings in books and scene designations in stage dramas. These “scene designations” help, or should help, the reader focus on the specific time spans and consequently the environments under discussion at the various points in the narrative. For example, this was the approach used by Jones and Monieson (1990a) in their chronological review of the marketing history literature. After arranging that literature in chronological order, a pattern emerged with themes corresponding to periods in time. They discovered, for example, that most of the historical research in marketing written between 1930 and 1959 was very descriptive and seemed to be preoccupied with recording the facts of marketing history.

On the other hand, the argument can be advanced that at least a rough sense of periodization can be useful for the historian before gathering data. Bentley (1996) makes the following argument in this connection.

“the identification of coherent periods of history involves much more than the simple discovery of self-evident turning points in the past; it depends on prior decisions about the issues and processes that are most important for the shaping of human societies, and it requires the establishment of criteria or principles that enable historians to sort through the masses of information and recognize patterns of continuity and change” (p.749).

This ex ante approach is illustrated by Bentley’s (1996) use of cross-cultural interaction as the fundamental principle around which he organizes periods in world history (see Table 1).

### Table 1

<table>
<thead>
<tr>
<th>Dates</th>
<th>Period Descriptions</th>
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<tr>
<td>3500 – 2000 B.C.E.</td>
<td>Early Complex Societies</td>
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<tr>
<td>2000 – 500 B.C.E.</td>
<td>Ancient Civilizations</td>
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<tr>
<td>500 B.C.E. – 500 C.E.</td>
<td>Classical Civilizations</td>
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<td>500 – 1000 C.E.</td>
<td>Post-Classical Age</td>
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<td>1000 – 1500 C.E.</td>
<td>Transregional Nomadic</td>
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<tr>
<td>1500 C.E. – present</td>
<td>Modern Age</td>
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If Bentley’s amazingly erudite periodization of world history, based on intercultural contact through long distance trade, mass migration, and empire building holds up under future scholarly analysis, this approach will prove highly beneficial to future students. We should note, however, that Manning (1996) expresses mixed admiration and reservations concerning Bentley’s approach partly because of its rejection of other established periodization schema and partly because of concern about oversimplification in its fundamental concepts. Unfortunately, Otte (2002) points out that universal, simplified histories almost always succumb to attacks on specific points by specialists.

An example of ex ante periodization from Table 3 is Bartels’ well-known categorization of the 20th century marketing literature into decades. Here, the criterion or principle used to identify periods was a convenient time period – decades. Thus, Bartels organizes the literature into periods from 1900 to 1910 which is labeled the “period of discovery” and so on. Keith’s (1960) periodization yielding the so-called “marketing revolution” at Pillsbury is another example which seems to have been developed ex ante, based on the hypothesis that marketing savvy executives during the 1950s discovered revolutionary new, sophisticated, more effective ways to market products.

Obviously when researching any subject one can begin with the Creation, Big Bang, or whatever one believes to have been the original starting point of the universe and continue until close to press time. Having some sense of what period in time one wants to study helps impose parameters upon the investigation and
allows greater concentration. History departments are typically organized on a periodized basis, so that scholars focus on specific eras such as classical times, early modern Europe, and so on. Historical research must, however, maintain a skeptical view toward any such periodization imposed before (ex ante) approaching the facts, or what appear to be the facts. Thus for example, many contemporary historians now question whether the so-called Dark Ages, particularly in their latter years, were really nearly as dark as we once presumed. Green (1965) holds that ideally any periodization plan should be based on over-arching theory of change and that reasonable symmetry should exist among the individual periods but under practical conditions of limited and varying knowledge concerning eras and venues and variations in the rate of change the historian must make personal, artistic choices.

Periodization and Stage Theories

Although there is often a close relationship between the two concepts, periodization should be distinguished from stage theories. Stage theories in marketing hold that the processes encountered in one environment are a necessary prerequisite to comparable development in another venue or instance. Such stage theories are illustrated by lifecycle analysis and, in the case of economic development, by the type of periodization expressed by Clark (1940). Clark’s economic stages are similar to the stages implicit in Hotchkiss’s (1938) study of 1500 years of market distribution. Both of these stage theories are included as part of Table 2. However, overlapping Hotchkiss’ implicit stage theory is an explicit periodization also summarized in Table 2.

Stage theories play a central role in both the Hegelian and Marxian theories of economic history (White 1973). They assume that with some modification resulting from demonstration effects, less developed societies will necessarily go through the industrialization process that has occurred, for example, in the Western world. We should note that Fullerton (1987) criticizes lifecycle and similar stage theories as not historical because as usually enunciated, they assume a rigid pattern of development that will apply regardless of time and place without attention to context. This criticism is not entirely fair since the statistical dimensions (i.e., duration and intensity) at the stages, may vary from case to case, even though the stage succession presumably remains fixed. While subject to the defect of extreme reductionism, as noted below, periodization does not ignore context, but rather tries to set it up in a word or catch phrase.

TECHNIQUE OF PERIODIZATION

There are several basic techniques for periodization used by historians. One is to use rigid calendar dates, such as decades and/or centuries (Gould 1997). This is illustrated, for example, by Bartels’ (1976) well-known system of decennial periodization for general marketing textbooks (see Appendix – Table 3). Such a system is inherently weak because human events rarely arrange themselves to fall evenly between years that end in the numeral zero (Stowe 1983). Clark (1967) holds that the use of decades or centuries is an obvious fallacy and that all periodization involves a tendency toward nominalist oversimplification but simultaneously is valuable in promoting communication and understanding. For example, phrases such as “19th century thinking” do have meaning for the historian. Barbara Stern (1992) also argues for what she calls the Fin de Siecle or “end of century” effect, i.e., a tendency for nostalgia to influence popular taste toward the approach of years ending in “00”.

The late great Canadian writer and dramatist, Robertson Davies (1998) also cites a similar phenomenon in one of his essays. It is not uncommon for marketing histories with longer periods to use centuries. Most of the earlier periods in Hotchkiss’ (1938) Milestones in Marketing are centuries despite the fact that some of the specific events which served as turning points did not occur at the end of a century. Centuries also serve as one or more periods in the works of Levet (1929) and Beard (1938).

A second method is to arrange material according to the occurrence of some external event, such as a change in the editorialship of a scholarly journal, (e.g., Kerin 1996) or the coronation of the monarch as with the case of British legal reports. Hotchkiss (1938) used this method to identify some of the periods in his seminal study of marketing history. For example, his “periodic markets” period began with the Norman Conquest of England in 1066.

“William the Conqueror performed a number of services for England that had their effect upon marketing conditions and methods. He unified England and gave it a strong central government. He established a permanent peace, suppressed robbery and made internal travel safe. He brought about closer relations with the Continent and thus stimulated the foreign trade of the Island. He brought in Flemish craftsmen who established new industries and improved old ones. He stabilized the feudal or manorial system. He brought all fairs and markets under strict orderly regulation.” (Hotchkiss 1938, p.13). This method is justified when such an event is likely to precipitate a change in the direction of the material under study, as it did in England in 1066, but otherwise can be arbitrary and therefore inappropriate.

A third method relies on the important turning points in the material itself under review. This is the most logical and acceptable method of periodization. Turning points can be significant changes in marketing methods, in economic conditions, and so on. That was the basis for the periods in Converse’s (1959) Fifty Years of Marketing in Retrospect. For example, he describes the period from
1900 to 1917 as the “high cost of living era” because of the dramatic rise in living costs following the depression of the 1890s, which led to changes in wholesaling, retailing, and advertising methods. Similarly, the combination of rapid population growth and pent up demand following World War II together with innovative applications of technology helped create what Converse called the “gadget economy” between 1946 and 1959.

Another example using turning points to determine periods is Fullerton’s revision of the history of modern marketing (1988). His “era of origins”, which begins in the mid-18th century in Europe and mid-19th century in America, relied on changes in political, religious, and social forces which created a capitalist attitude as well as new production capabilities brought on by the industrial revolution. In Fullerton’s periodization, these turning points marked the beginning of “pervasive attention to stimulating and to meeting demand among nearly all of society” (p.122) or, the beginning of modern marketing.

Actually, a fourth technique, revelation, is conceivable. In the late 19th century dispensationalism caused quite a stir in Protestant church circles with a supposedly divinely revealed re-periodization of biblical history (Sandeen 1970, Marsden 1980). R.G. Collingwood (1956), an often-cited writer on historical method, argued that a truly universal history must be based upon Christian theology and should be divided into two basic periods called before and after the birth of Jesus Christ. It would then be subject to appropriate sub-periodization. This is in line with the Hegelian stage theory that civilization advanced along cultural, social, political, and especially spiritual dimensions from east to west, originating in a stultifying Chinese patriarchy around 3000 B.C. and advancing to its democratic high point in the German Protestant Reformation of the 16th century (Orynski 1960). This methodology is not likely to affect such a secular subject as marketing. Yet in a remarkably unnoticed passage, Bartels (1976) explains the appearance of marketing in the world as attributable to divine influence.

“The foretold patterns of the advent of this influence are the subject of prophetic literature, which is found in many writings, ranging from those of ancient patriarchs to those of Free Masonry. The prophetic account of spiritual determinism known as The Revelation of Saint John the Divine has particular reference to what is now called marketing” (p.7).

More to the point, most long-run histories of marketing thought, unlike histories of economic thought, have tended to ignore the impact of the reformation on the basic acceptability of the capitalist market system. Unlike economic historians such as Webber, Sombart, and Tawney, marketing historians have typically given little notice to the commercial impacts of the Reformation. Hotchkiss (1938) did make several off-hand references to it but assumed that his readers were so familiar with its consequences that no explication was necessary. Dixon (1996), in his review of an essay on drapery, does consider how the changed moral criteria of the period influenced a merchant’s view of his own activities.

The marketing literature has also ignored an important ethnographic concept of “middlemen minorities”, i.e. the tendency for domestic and international trade in peasant, underdeveloped societies to be concentrated in the hands of ethnic/cultural/religious minorities. This occurs, in part, because such groups are often barred from holding land, and in part, because they are the ones with significant social and commercial contacts. That often leaves them in a position of economic advantage but with great vulnerability to majority hostility. Religion and politics may be taboo as dinner table conversation subjects in a polite society, but they are clearly relevant to marketing history.

PROBLEMS OF PERIODIZATION

Although we do not agree with some critics who see periodization as an intellectually destructive process that substitutes catch phrases for meaningful inquiry, there are some problems related to reductionism, duration of periods, consistency, annualization as a form of periodization, and the false sense of progress that periodization often assumes.

Reductionism

The use of period designations is really an oversimplification. It is an attempt to compress a complex role of events into a single catch phrase or word. Thus, it departs from the complexity of history and tries to emphasize one aspect of a multi-faceted chain. Perhaps for this reason periodization has sometimes been characterized as a passé 19th century technique (Ree 2002) although, as Tables 2 and 3 demonstrate, we have found numerous examples of its use in 20th and 21st century marketing thought.

Under the pressure of reductionism, the periodization process can often cause omission of important variables in the historical picture. Later in this paper, we note several examples of how the omission of important marketing events from consideration have influenced the received view of marketing history and the history of marketing thought.

Duration

It seems likely that the use of relatively short time periods will involve or create problems that are distinct from those inherent in the use of longer time intervals. For one thing, of course, decreasing the time span in each period will increase the number of such periods and will consequently impose greater memorization difficulties on
the reader. More importantly, it will probably induce greater volatility and variability in the data. Time series are usually seen as subject to four types of change: 1) seasonal variation, 2) cyclical change, 3) random variation, and 4) secular trend. Longer periods of analysis increase the chance that seasonal, cyclical and random variations will be absorbed within the secular trend. Both Heagon (1955), an economic historian, and Gerhard (1956), a specialist in European history, argue that history involves more continuity than change and, therefore, that periodization should be expressed primarily in terms of very long time spans. The length of the periods in Table 2 span centuries while the periods illustrated in Table 3 cover much smaller time frames.

Consistency

We have emphasized the importance of context, complexity, and variation. Each of these can cause or require changes in focus over time, e.g. from marketing operations to government regulation to marketing thought. Nevertheless, to the extent that it is possible it seems preferable to concentrate on the same dimension of marketing throughout a periodization. The problem is well illustrated in the work of Levett (1929) and to a lesser extent by Converse (1959) who seems to assemble a jumble of different context issues and marketing practices that do not form a meaningful pattern.

Annualization

A point raised by Professor Corwin Edwards in an industrial organization course he taught in the 1940's at American University, was that corporate performance is most often reviewed on an annual basis. This really constitutes a form of periodization. In many ways it is not only grounded in custom, but possesses a certain logic. The use of annual measures does embrace a full cycle of yearly seasons and thus does provide a certain smoothing effect compared to shorter or less regular periods. Nevertheless, as Edwards pointed out, many business revenues and expenses really fall over longer time spans than a year. Advice that appears in financial journals and popular media every winter and spring on accelerating expenditures and deferring income receipts for taxation purposes demonstrates the inappropriateness of the year as a measure of business activity.

There are some examples of this creating a problem in marketing history. In 1933, Horace Secrist, a marketing professor at Northwestern University, published a book titled The Triumph of Mediocrity in Business (1933). After a laborious analysis of annual operating statistics for a large sample of retail menswear stores, retail hardware stores, department stores, wholesale grocers, banks, and railroads, he concluded that those firms that demonstrated substantial variation from the modal figures in any one year tended to move closer
to the central numbers in subsequent years. The work attracted considerable attention and mixed reviews. King (1934) and Elder (1934) praised the book highly, however Garver (1934) was somewhat more restrained. He criticized Secrist for excluding from the analysis those firms that entered or left the business during the study period. He commented that the history of America's chain store distribution demonstrated that new retail firms frequently displayed exceptionally efficient operating figures during their initial years before entering a decline. He thus anticipated the popular interpretation of McNair's "Wheel of Retailing" by about two decades. Helms (1934) echoed Garver's criticism and Howard Hotelling (1934), probably the most accomplished statistician of the group, held that Secrist's naive analytical methods resulted in a foreordained conclusion. The reviewers noted that many factors could account for annual changes in business performance. At that time, however, income tax rates were much lower than they are now and consequently the media probably did not publish much advice on the deferral of profits and an acceleration of expenses. Also, it is likely that there had been little widespread exposure of the "Minnie Pearl" type of financial chicanery that treated the anticipated income as current revenue. So, the reviewers really had a pre-modern view of operating statistics as measures of business performance rather than possible creative accounting artifacts.

False Sense of Progress

Since periodization is almost always done in retrospect, there is a strong tendency to see events moving from a less desirable state to a more desirable one in that the current condition is normally viewed as superior to the past (Ree 2002). Sometimes that progress is real; often it is overstated. Thus, Keith's (1960) description of a supposed "marketing revolution" progresses from production to sales to marketing concept periods. Fullerton's (1988) periodization progresses from the origins to institutional development and finally, refinement and formalization of modern marketing. In Jones and Monieson's (1990a) chronology of historical research in marketing, the field is viewed as progressing from "recording the facts" to "integration of practice and thought", then "expanding its scope", and finally in the 1980s "emerging as a discipline"! If only it were that easy.

The history of marketing thought has fulfilled the prediction that periodization will tend to express its view of human progress. The literature sees marketing as moving from a crude state of intuitive action toward an increasingly informed and scientific discipline (Bobbitt 2002). Only Richard Pollay's (1985) "Subsiding Sizzle" study of print advertising in popular magazines depicts a decline in marketing orientation during the twentieth century. Studies of consumer culture, which raise cries of
over-stimulation, satiation, and alienation, cannot share the marketing historian’s satisfaction with the whole process (c.f. Williams 1982, McCracken 1985, Lears 1985).

OBSERVATIONS

Clearly there is a great diversity of opinions about the pattern of periodization in the history of marketing and marketing thought. Even when the periodizations in Tables 2 and 3 are grouped by common focus (e.g. marketing thought; advertising; and so on) there is little evidence of pattern or commonality among them. This could be considered a sign of the field’s immaturity. It can also be interpreted as an indication of its vitality. Vigorous debates about periodization appear to exist in other subfields of history such as world history and economic history. Either way, it does constitute a challenge to the profession to strive for a clearer consensus about the important events and changes in the past. For example, it seems unfortunate that we cannot agree as to when marketing began. There are those such as Dixon (1996) and Nevett (1991) who see its roots in antiquity. Recent improvements in such fields as marine archeology tend to reinforce views of the importance of Mediterranean trade routes in the classical and pre-classical eras. There are others, however, who feel that such retrospective studies involve forced attempts to push primitive undertakings into modern categories. They believe that nothing much worthy of the name “marketing” occurred before the industrial revolution. Some, such as Bartels, place a starting date even later at the beginning of the 20th century. Finally we can suspect that there are many graduate students entering the professorate who believe that nothing much happened before they received their Ph.D.’s. A good bit of this controversy is probably a question of semantics, and thus, the issue to some may not be what happened but whether it deserves to be called marketing.

We have noted that one of the problems of periodization can be the inclusion of bad data or the omission of good data. In spite of all the historical work that has gone on in marketing during the last fifty or more years some considerable and some major manifestations have been ignored. George Hotchkiss’ (1938) view of medieval English life should probably be subject to some revision in the light of modern historian’s upward reevaluation of economic development during the later Middle Ages. In contrast, though, modern students would do well to read and ponder his description of American marketing developments during “the merchandising age” (1900-1932), the Great Depression (1930-1943), and the wars. No later marketing scholar seems to have captured the excitement and volatility of the marketing scene during those periods as well as Hotchkiss did. He directed our attention toward numerous events, such as the massive campaigns for standardization and simplification of items and product lines that are now virtually unknown to marketing scholars (Hollander 1984). He seems to be about the only marketing historian who paid attention to national prohibition, the only consumer protection activity that became embodied in the U.S. Constitution. The Anti-Liquor Campaign did receive more church support than did the Anti-Tobacco Campaign of the 1980s but much of the argument against the sale and consumption of alcohol was based on considerations of consumer health and welfare. Yet even historians of consumerism seem to consider the latter but not the former campaign as falling within their orbit (Hollander and Singh 1993.) Most importantly, Hotchkiss alone seems to cite much of the vigorous experimentation in marketing techniques that occurred within the first forty years of the century.

The history of marketing thought appears filled with terra incognito discussions of managerial marketing that usually treat the area as having emerged in the 1950s with the appearance of the Howard (1963) and McCarthy (1960) books. They did mark a revision of introductory graduate and undergraduate textbooks to express more emphasis on what marketing managers did than on the environment in which they operated, but the early professors certainly thought they were training marketing managers. The senior author of this paper once heard Professor T.N. Beckman compare marketing and medical education at an American Marketing Association annual convention. He held that the introductory Marketing Principles course was comparable to the study of anatomy; the specialized subsequent courses in the subfields played the same role as the study of physiology and the traditional capstone case course provided training in diagnosis and therapy. Casebooks on the Harvard model were a prominent part of the literature after 1923.

Similarly the Macromarketing School, which deals with the relationships between marketing and society, is thought by many to be a post World War II phenomenon. Yet as Goodman (1996) and Bussiere (2000) have pointed out, prior to 1937 marketing professors had little opportunity to publish within the discipline and therefore turned to economic and social science journals, such as the Annals of the American Academy of Political and Social Science and the American Economic Review. This, along with their own interests, directed their attention toward such macro topics as the cost of distribution, the definition and determination of marketing efficiency, and problems of public policy. The name “macromarketing” had not yet been coined, but the substance was there.

This list of omissions discussed above is not exhaustive. For some reason historians of marketing thought appear to have ignored Jones and Monieson’s (1990b) analysis of Germanic influences on the early teaching and writing about marketing. Similarly they have ignored the contributions to marketing by women as outlined by Zuckerman and Carsky (1990). They also share a fault demonstrated in this paper as well, relative
inattention to 19\textsuperscript{th} and 20\textsuperscript{th} century European marketing and marketing thought.

In contrast, Keith’s (1960) widely accepted history of “the marketing concept” appears to be more a case of misinformation rather than omission (Hollander 1986, Fullerton 1988, Witkowski 2002). A little further examination of the problem will probably suffice to make the point. For example, an examination of introductory marketing textbooks using the received production / sales / marketing era periodization (Keith 1960) shows that a majority of them omit any mention of World War II and the post-war recovery period from their discussion of the supposed 1930-50 sales era. During that period from 1941 to 1946 or 1947, U.S. federal excess profits tax and procurement price policies encouraged the maintenance of corporate promotional efforts but the whole sense of urgency was removed from the marketing scene as buyers clamored for the limited supply of available goods. The subsequent supposed “Marketing Concept revolution,” really a return to normalcy, remains totally unnoticed by business and economic historians in spite of its proclaimed widespread reorientation of this fundamental business activity.

CONCLUSIONS

This conference is devoted to identifying the heroes and the scoundrels of marketing. By and large, the periodizers must be considered the more or less unsung heroes of marketing history. Many whom we have quoted are important and well-known figures in their own right but, if so, they have been primarily known for their own individual substantive contributions. Their labors in trying to sort out our history have largely gone unrecognized or at least have not been framed as models to be passed from generation to generation of students.

With regard to a few of the most prominent at least at the time when their careers peaked G.B. Hotchkiss possibly most deserves the Distinguished Service Medal. Jones (1995) has unearthed an unpublished autobiographical memoir in the Hotchkiss files at the NYU archives wherein Hotchkiss simply seems to be a petulant old man longing for more recognition, but his historical work really shined when it turned to one of the most important periods in marketing development.

Robert Bartels unfortunately emerges as a greatly flawed hero. There is no doubt that his own forceful personality, vast enthusiasm, and dramatic skill as a lecturer gave tremendous boost to the study of the history of marketing thought. Sadly, his reliance on inadequate periodization, addiction to hyperbole and over-concentration on trivial changes in textbook titles pushed the discipline in the wrong direction. This is a matter of pure speculation but we must remember that Bartel’s (1976) History of Marketing Thought began as a doctoral dissertation in a department populated by very prominent textbook writers who took themselves and their work very seriously. As a doctoral candidate he may have seen no future or not even been allowed to think about any way to go except adoration of the volumes his elders added to the literature. Once the pattern was established his volume grew by accretion, but not by revision. Sheth, Gardener, and Garrett’s (1988) metahistory of the schools of marketing thought, summarized in this study by Sheth and Gross (1988), cannot escape all criticisms but it reveals a far more intellectual and intelligent comprehension of the field.

Among this group of leaders Robert Keith more thoroughly deserves the label scoundrel, or perhaps to be more fair, simply boastful, incompetent scholar. Golder (2000) notes that every historian should be subject to the test of conflict of interest. Keith’s (1960) description of the emergence of the marketing concept at Pillsbury is really a hymn of praise to his own role as an executive of that company. His failure to even mention the far more advanced state of marketing at competitor General Mills, of which he must certainly have been aware, constitutes neglect of scholarly duty.

Finally, as we look at all the periodization that has been done so far, it appears that there is probably more to do. Have any of us really grappled the total dimensions of marketing change over time? How deeply have we penetrated beneath the surface into the ways marketing has transformed human society for good and for ill? In a recent review in the London Times literary supplement, T.G. Otte (2002) cites political historian Phillip Bobbitt’s view that the market-state is now in the process of replacing the nation-state. Apparently, others share that view. Certainly we, as marketing historians, should have something to say on this point.

THE SOURCES

The sources cited in Tables 2 and 3 (see Appendix) are not intended as a universe of all references to the periodization of the history of marketing and marketing thought. Nor do they really constitute a scientific sample with known parameters of statistical error. Instead they are a collection based upon over 65 years of formal academic study and research in the field with a strong interest in how its history has been depicted, reinforced by a snowballing technique of pursuing relevant biographical leads. Instead, short, it constitutes what in old-fashioned terms would be called “a representative collection” that seeks to give full voice to all important and prominent approaches to that history.

George Burton Hotchkiss was a prominent early teacher of advertising at New York University. The periodization shown here has been inferred from his chapter headings in Milestones of Marketing (1938). Based on the memories of the senior author, Hotchkiss’ account of early 20th century marketing developments in the U.S. is one of the most complete and accurate re-creations of that period available.
Robert Bartels' *History of Marketing Thought*, the most frequently cited publication on the history of marketing thought, concentrates almost exclusively on the textbook publications of U.S. male marketing teachers. Bartels was the profession's most ardent and successful advocate for the study of the history of marketing thought. Paul D. Converse was an early teacher of marketing at the University of Illinois and the author of a very popular marketing text which demonstrated some very shrewd insights concerning both marketing and marketing thought. As a visiting professor at the University of Texas in the late 1950s, he wrote two companion historical volumes dealing with the history of marketing thought and marketing history. The latter was the source used here.

Robert Keith was a marketing executive at the Pillsbury Company, which ran a very poor second in marketing innovation to its primary competitor, General Mills. His *Journal of Marketing* (1960) exposition of the marketing concept has received widespread citation in the literature.

Richard Tedlow, a business historian with a special interest in marketing, has been editor of the *Business History Review* and subsequently director of research at the Harvard Business School. He was also a protégé of Alfred Chandler.

Colin Clark, noted antipodean economist, was concerned with determining conditions for achieving regional prosperity as enunciated in the Clark-Fisher hypothesis. The noted sociologist, Karl Polanyi, defines successive systems for allocating goods among individuals: reciprocity primarily involves gift-giving, redistribution involves collection and allocation by a central authority, householding, a form of self-sufficiency, marketless trade—long distance exchange conducted by central authorities and marketing individual trade responsive to supply and demand ratios and promotional effort.

Paul Bohannon and George Dalton, economic anthropologists, saw progression of stages from (a) household self-sufficiency to (b) exchange in central marketplaces governed by customary prices to (c) trade away from the marketplace governed by market supply and demand conditions.

N.S.B. Gras was a Harvard Business School professor and is generally considered the father of modern American business history. His doctoral students mainly produced industrial and financial histories although Ralph Hower’s *History of Macy’s of New York* (1943) and *History of an Advertising Agency* (1939) and J. Owen Stalsen’s *Marketing Life Insurance* (1942) are considered classics.

W.W. Rostow, an economist, was chair of the Policy Committee of the U.S. State Department during the Johnson Administration.

Simon Kuznets, an economic statistician, was a professor at the Wharton School, and later at Johns Hopkins, also affiliated with the National Bureau of Economic Research and was a winner of the Nobel Prize in Economics.

Ronald Fullerton received a PhD in history and is currently a member of the faculty at the American University in Cairo, Egypt.

Eric H. Shaw is a professor and Chair of the marketing department of Florida Atlantic University. The periodization used herein is drawn from a chapter written by Jones and Shaw for the *Handbook of Marketing* (2002) edited by Barton Weitz and Robin Wensley.

Donald Jackson is a professor of marketing at the University of Arizona. His paper that was presented at an American Marketing Association Conference is unique in recognizing the existence of a managerial marketing approach prior to 1950.

William Lazer, upon retirement from Michigan State University, accepted a chair as Eminent Scholar at Florida Atlantic University.

Anne Levett was a professor of history at the University of London. Her description of the development of marketing was a basic theme in the attempt to understand why British consumers were so slow in setting up cooperative flourmills.

Thomas C. O’Guinn is a professor in the department of advertising at the University of Illinois at Urbana-Champaign, Chris T. Allen is Professor of marketing at the University of Cincinnati and Richard J. Semenick is Dean of the College of Business at the University of Utah. The emphasis in their periodization, taken from their textbook, is on the development of promotion as an aspect of the marketing system.

Jagdish Sheth is a prominent professor of marketing at Emory University. Barbara L. Gross was a graduate student at the time this periodization was developed. The table in which this periodization is expressed was derived from Sheth, Gardener and Garrett’s (1988) *Marketing Theory: Evolution and Evaluation*. The classical period included institutional, functional, commodity and geographic schools of thought. The managerial period included managerial, systemic and exchange schools. The behavioral period included the organizational dynamics, consumerism and buyer behavior schools. The adaptive period included the macromarketing and strategic planning schools. Sheth has subsequently become the prime mover in the recent drive to study relationship marketing. One can easily consider relationship marketing a separate and more modern school of marketing thought.

At the time this paper was written, Brian Jones was a professor at the University of Prince Edward Island, now a professor of marketing at Quinnipiac University and President of the Association for Historical Research in Marketing. David D. Monieson is Emeritus Professor of Marketing at Queen’s University in Kingston, Ontario. Their article is based upon a detailed analysis of three hundred and fifteen marketing history publications issued between 1930 and 1989. Essentially this is a history of marketing history writings. In other words it is an exercise in historiography.
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REFERENCES


Beard, Miriam. 1938 A History of the Business Man. New York:


Converse, Paul D. 1959. Fifty Years of Marketing in Retrospect. The University of Texas, Austin: Bureau of Business Research.


APPENDIX

There are two tables, Table 2 and Table 3, appended on the following pages. Table 2 includes several stage theories and a number of long periodizations (most a century in length). Table 3 includes a number of shorter periodizations (most approximately a decade or so in length). All of the sources of the periodizations included in these tables are listed in the references; very brief biographical information about the authors is included above in the section titled “The Sources".
### Appendix - Table 2. Stage Theories and Long Periodisations

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* INF = Inferred
* EXP = Explicit

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### Appendix - Table 3. Short Periodizations

|------------|------|----------------|-------------|------|------|------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|

*ESP = Extended ESP*