

Introducing the History of Marketing Theory and Practice

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1.1 Introduction

The global popularity of marketing as a subject for study might suggest that those studying and teaching the subject know what it is that they are studying and how this study should be undertaken. But as we shall see in this chapter and others in this book, this has often not been the case. Marketing as a subject has proved almost impossible to pin down, and there is little consensus about what it means to study marketing. Most organisations now employ marketers. Marketing roles were traditionally found in commercial firms, but increasingly all kinds of organisations feel the need to employ marketers or to commission services from marketing consultants.

The popularity and pervasiveness of marketing is, however, a relatively recent phenomenon. Academics have only studied marketing as a discipline in its own right for just over a century, and during its short history the study of marketing has been influenced by many different academic movements, fads and priorities. This variability can be viewed as a positive state of affairs, because it means that the subject is always open to new ideas and new trends. On the other hand, it has the potential to undermine the value of marketing knowledge because there is no general consensus on what the study of marketing should be for, how these studies should be conducted, or what the outcomes should be. Before we can begin to study marketing, we need to understand something about this history and the debates and controversies that have shaped the field.

In this chapter, we shall review the origins of marketing thought, examining when the term ‘marketing’ was first used, its subsequent development, and provide an overview of the development of marketing thought and practice. Marketing, clearly, is probably as old as human civilisation itself (see Jones and Shaw, 2002; Minowa and Witkowski, 2009; Moore and Reid, 2008; Shaw and Jones, 2005). For our purposes, we will restrict our attention to the emergence of marketing as an academic discipline and business practice early in the twentieth century.

What confronts most students and academics alike when they begin to study the development of marketing is the overwhelmingly American emphasis of much of the literature. The key textbooks, for instance, often contain examples of American corporate activities, sometimes tweaked for other markets, sometimes not. In writing this introduction we will obviously be tied to some extent to the history of American marketing. Many of the earliest college courses were developed there, most of the

principal thinkers in marketing throughout the twentieth century worked there, and as such it is natural that we talk about these people, institutions and their theoretical contributions.

But, in an effort to ensure that the material presented resonates with more than just an American audience, and to provide more balance to the history of marketing than is generally seen in introduction and advanced texts alike, we provide numerous examples of non-US marketing theory and practice.

As will be shown, not all countries adopted key marketing practices at the same time as they were discussed by US marketing scholars. Some countries like the UK, for example, turned to formal marketing education relatively late, even if the UK did have a number of companies and entrepreneurs who were naturally marketing oriented fairly early, such as the confectionery manufacturer Cadbury's (Corley, 1987; Fitzgerald, 1989). Other countries, such as Spain, underwent their own 'marketing revolution' (Keith, 1960) even later. So, in short, we would ask that you remember that the theory and practice discussed in this and the following chapter are the result of very specific political, social, technological, and economic environments in the economies discussed. We would encourage you NOT to think 'of marketing as a homogenous, almost universally applicable concept, transcending cultures as well as contexts' (Cannon, 1980: 140).

1.2 The Early Development of Marketing Thought

In his important history of marketing, Bartels (1988) proposes that the term 'marketing' was first used 'as a noun', that is, as a label for a particular practice, sometime 'between 1906 and 1911' (Bartels, 1988: 3). Nonetheless, Bartels' historical account has been challenged by scholars who assert that there were people writing about the subject before 1906 (Brussière, 2000). In appraising the Publications of the American Economic Association, Brussière found that the term marketing was actually used in 1897. Tamilia (2009), on the other hand, suggests that it was used even earlier than this in the *Quarterly Journal of Economics*.

These examples are clearly taken from the academic literature. But it was not just academics writing about the subject. For example, Shaw (1995) notes that in *Miss Parloa's New Cookbook and Marketing Guide* which was published around 1880, 'marketing' related to buying and selling activities. This was not the only book using the term at this time or previously. Shaw says that if we look at dictionaries prior to the Bartels statement the intellectual history of the term 'marketing' can be extended much further, all the way back to 1561 (Shaw, 1995: 16).

On a related point, Dixon argues that 'The *Oxford English Dictionary* traces the use of this term [marketing] to the sixteenth century; it certainly did not originate in the United States between 1906 and 1911' (Dixon, 2002: 738). Nor should we think that marketing education originated in the United States. In actual fact, the first courses were found in Germany at the turn of the twentieth century (Jones and Monieson, 1990). Having said this, the American Marketing Association and American marketing educational system has obviously been very important in terms of the development of marketing thought. As an anchor for the rest of the chapter therefore, consider the changing definitions of marketing in the Box below. These definitions illustrate how marketing as we know it has taken the shape it has.

Voices – The American Marketing Association and the Changing Definitions of Marketing

Wilkie and Moore (2006) tell us that there is one important issue that we should acknowledge in the changing definitions of marketing inasmuch as the definitions become more managerial over time. That is, less attention is paid to the influence of marketing in and on society and more attention is devoted to articulating the management function that marketing performs inside an organisation.

So, from the first definition of marketing provided in 1935, through to the 1985 and 2004 modifications, the definitions change from marketing being: 'the performance of business activities that direct the flow of goods and services from producers to consumers' (1935). [To marketing as] the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods and services to create exchanges that satisfy individual and organisational objectives (1985); [to marketing as] an organizational function and set of processes for creating, communicating and delivering value to customers and for managing customer relationships in ways that benefit the organisation and stakeholders' (Wilkie and Moore, 2006: 227).

The problem with the last definition is that attention is focused on marketing as an organisational activity – there is no mention of marketing's role extending beyond those activities most closely associated with the firm. Thus, by removing the societal emphasis that earlier scholars demonstrated in their desire to improve marketplace efficiency, distributive justice, standards of living and the distribution of products at lower prices, later definitions in effect encourage people not to think about such improvements in the marketing and distributive system as a whole, but simply focus on those aspects relevant to an individual firm. It also assumes that individual firm activities will in the aggregate be unproblematic.

As far as one of the most recent definitions is concerned, marketing activities do not actually impact on wider society. It was the excessive managerial emphasis of this definition that led to a series of heated exchanges both online and in the *Journal of Public Policy and Marketing*. Ultimately, the American Marketing Association went quickly back to their drawing board, bringing out a new, updated definition that responded to the criticism by scholars, so that the latest definition reads: 'Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large' (Lib, 2007).

1.3 The First Courses in Marketing in the Early Twentieth Century

As was mentioned above, some of the first courses in marketing appear to have been delivered in Germany. There is, unfortunately, little detailed discussion of these in the marketing literature. Studies of early courses in marketing in USA are far better documented. Dr E.D. Jones is often credited with offering the first course in marketing in 1902 at the University of Michigan (Maynard, 1941). This course was not actually called marketing at all when it was first offered, but 'The Distributive and Regulative Industries of the US' (Bartels, 1951a). The first course actually called simply 'Marketing' was delivered some nine years later by Ralph Starr Butler at the University of Wisconsin. In the intervening period, other universities had nevertheless started providing their own courses on distribution, advertising, salesmanship and related subjects.

At a general level, we can consider marketing as a form of ‘applied economics’ (Shaw and Jones, 2005). Its emergence is often attributed to the fact that despite the variety of academics working in the various sub-disciplines of economics in the late nineteenth and early twentieth century, there was still a great deal of concern that economic reflections on the marketplace were not used to formulate guidance for practising managers (Kemmerer et al., 1918).

Furthermore, the information that was available was often found in relatively obscure academic sources that few, if any, actually managed to access and read (Ashley, 1908). These access issues were compounded by the fact that: ‘The greater part of the economic world has not yet been surveyed descriptively and realistically’ (Ashley, 1908: 188). It was here that marketing scholars and consultants had the opportunity to contribute to knowledge about the functioning of the economic system. They could help practitioners understand the marketplace and help investigate consumer needs and desires which had largely been ignored by economists (Mason, 1998).

In the very beginning, early marketing academics focused their attention on ‘describing, explaining, and justifying prevailing marketing practices and institutions, particularly newer ones’ (Bartels, 1988). Early scholarship was partly written with the intent of modifying ‘misconceptions held among the public, such as the belief that the wholesaler was parasitic and would disappear from the distributive system, [the] fear of [the] annihilation of small stores by chain organisations, and dismay at the plight of consumers before the ruthless practices of vendors’ (Bartels, 1988: 29).

To effectively understand the rapidly expanding industrial economy of the US, these practically minded researchers refused to spend their time theorising in their ivory towers, preferring instead to study the practice of marketing, charting the passage of goods through the distribution system (Weld, 1941). What *is* interesting is the reference made by Bartels above to the justification of marketing activities, on both the basis of its efficiency and in terms of the utilities created.

1.4 Marketing, Efficiency and Utility Creation

When we talk about justifying marketing, what we mean is that scholars wanted to demonstrate that marketing did perform a useful and valuable role in distributing goods and services to where they were needed, at appropriate price points and in so doing, enhancing the quality of life experienced by consumers. They wanted to justify the value of marketing in this way for the reason that many people living in the early twentieth century were concerned about the rising cost of distribution. People could appreciate that there were a variety of intermediary steps involved in distributing goods from the manufacturer to the wholesalers and onto the retailer and they quite rightly asked the question: Were these middlemen adding value or just cost? Were middlemen adding value to their offerings by getting the right product to the right place at the correct time, thereby adding time and place utilities? Was advertising useful to the consumer, aiding them in making more effective decisions? Or were each of these factors just adding another layer of cost which the consumer had to subsidise? These issues were especially important as prices had been continually rising from 1896, accelerating still higher during the First World War (Usui, 2008).

These issues, especially the disjuncture between the prices paid by middlemen to farmers, and the ultimate price the consumer paid, were subsumed under the label

‘the marketing problem’ (Jones and Monieson, 1994) and the ‘distribution cost debate’ (Wilkie and Moore, 1999). Such concerns have not exactly disappeared today; although these debates about the cost of distribution were first aired in 1900 or thereabouts, with ‘farmers questioning why they received only a low percentage of the consumer’s food dollar; today, buyers (and farmers) ask why cereal brands are priced so high relative to ingredient costs’ (Wilkie and Moore, 1999: 215). While such criticism of the efficiency of the marketing system continues, theoretically this topic raised an important question about marketing – were there any elements in distribution channels, for example, that were not adding some form of utility (Benton, 1987)?

Arch Shaw (1912), a publisher and sometime marketing academic, believed the criticism of middlemen was largely unwarranted. Middlemen, Shaw claimed, provided highly valuable services in that they stored goods, assuming an element of risk in doing so, because if conditions in the marketplace suddenly changed, they might be left with a stock of goods they could no longer sell. Bearing this in mind, Shaw suggested that middlemen performed a valuable service and consequently should be properly compensated. Fleshing this point out, Wilkie and Moore summarise the utilities added by marketing activities in the following way (try thinking about these in terms of the 4 P’s of product, place, price and promotion):

... Marketing adds] form utility ... by (1) physically supplying essential inputs to the production process and (2) providing insights from the marketplace (e.g., market research) that help decide specific attributes for goods and services. Place utility is clearly marketing’s province, representing the value added by providing goods where buyers need them. Marketing adds time utility through preplanning, inventory, and promotion activities to ensure customers can obtain goods when needed. Finally, possession utility is offered through marketing transactions and enables customers to use goods for desired purposes. (Wilkie and Moore, 1999: 209)

So, if we were to frame our discussion so far in terms of concepts from the philosophy of science which take the form of a ‘reflection on the nature and practices of [marketing] science’ (Jones, 2007: 1243), we can say that early marketing scholarship was thoroughly grounded in empiricism. Empiricism is a theory of knowledge that refers to the idea that if we want to justify knowledge, then it must have some basis in experience. In other words, early marketing scholars went out into the marketplace to examine market institutions such as retailing environments or farming product exchanges to formulate descriptions of how these institutions functioned. From an empiricist, we would expect to hear comments like those uttered by Louis Weld on the need for the interconnection of economic theory with marketplace reality: ‘I am not denouncing theoretical economics by any means...[but] valuable contributions can be made to the theory of market price by getting out into the markets with a market reporter than by cogitation in a closet’ (Weld in Kemmerer et al., 1918: 267).

With this turn toward a more ‘applied economics’ focus (i.e. trying to use economic theory to improve marketing practice or using the knowledge gained from studying the market to critically examine economic theory such as the view of the utility maximising consumer), academics and ‘marketing counsellors’ began directing their attention towards the actual functioning of the marketing system. And it is around this time – the early twentieth century – that the first philosophy of science debates in marketing appeared.

1.5 German Historical School

Those thinking about a teaching and research career in marketing in the late nineteenth, early twentieth centuries were often taught by scholars who had been trained in Germany and subsequently absorbed the worldview of the German Historical School (Jones and Monieson, 1990). Academics trained in this worldview thought that the marketplace should not operate unfettered. Rather than letting the invisible hand of the market dictate production and economic relations, they thought that the government should attempt to regulate the market where necessary, with scholars providing knowledge about the problematic workings of the marketplace to government or other officials.

In terms of the philosophy of science underpinning the German Historical School, they subscribed to an inductive, 'positivist' epistemology, and hoped to develop a science of marketing (Jones, 1994; Jones and Monieson, 1990). What this means is that they studied the marketplace, examining specific cases that showed how the market worked (i.e. in relation to agricultural distribution etc) and then used this information to generalise about the operation of the marketplace (going from specific to general cases = induction).

By formulating and validating such generalisations, marketing scholars could then, through their involvement with public policy, either work to improve the operation of the market, or legislate against detrimental or inefficient practices. This latter point indicates a further issue that was important to this group: ethics and distributive justice. By distributive justice we mean 'how a community treats its members in terms of benefits and burdens [that are shared] according to some standard of fairness' (Laczniak and Murphy, 2008: 5). The German Historical School, put simply, viewed their work as contributing to ensuring that all participants in the market were treated fairly, including customers and middlemen.

Unfortunately, as Jones and Shaw (2002) reveal, those associated with this school of thought were not successful in creating the science of marketing that they wanted. Pretty soon, issues of distributive justice and ethics faded from the mainstream of marketing thought. From distributive justice and a concern for the 'marketing problem', commentators across the spectrum of marketing began to devote more attention to what was called the 'consumer problem' (Tadajewski and Brownlie, 2008). In the context of the first two decades of the twentieth century, supply began to exceed demand, so that the focus of marketers' attention became selling products efficiently and effectively through well thought out combinations of product, price, promotion and distribution strategies (Zaltman and Burger, 1975). In recognition of changing demand and supply relations, alongside increasing competition between firms (Hoyt, 1929/2000), it was also more important for businesses to effectively control the interactions between their salesforce and the customer. Similar views had long been held by retailing pioneers like John Wanamaker (Appel, 1938), who like later scientific sales managers, wanted to foster positive customer relations and develop long-term relationships between a company and its most desirable clientele, and controlling the sales force was one means of doing so (Graham, 2000; Strong and D'Amico, 1991).

1.6 Frederick Taylor and Scientific Sales Management

An important, but all too often neglected contribution to marketing theory and practice was made via the work of Frederick Winslow Taylor, the father of scientific management.

Marketing scholars recognised in Taylor's work a way to make marketing, retailing and salesmanship more efficient (Cowan, 1924; Graham, 2000; La Londe and Morrison, 1967; Usui, 2008). Taylor had come to popular attention via his attempts to place production on a scientific level. By this, we mean Taylor sought to examine the way that particular activities were undertaken such as shovelling coal, in order to determine the most effective way of doing so.

Behind this strategy of determining the 'one best way' of engaging in any given activity was the issue of organisational efficiency. Connected to this, management were expected to study their workforce, drawing up detailed guidelines for workers that aimed to encourage them to work at their optimal level, 'at the highest grade of work for which his [*sic*] natural abilities fitted him' (Taylor, 1911/1998: 1). This standard was itself based on the standardisation of worker tasks into the key elements that must be undertaken, with all superfluous activities disregarded. Taylor's work was heralded as encouraging a revolution in management practice, increasing production efficiency to rates previously unheard of. The problem was, however, that increasing production in this way required a similar increase in distribution efficiency. After all, there was no point producing goods at ever increasing speed, if they could not be sold in a similarly efficient manner.

Into this breach strode a number of early marketing thinkers who sought to apply Taylor's insights to marketing practice, including such scholarly pioneers as Arch W. Shaw, Paul Converse, Charles W. Hoyt, Stuart Cowan and Percival White, as well as practitioners such as H.W. Brown of Tabor Manufacturing Company and Edward A. Filene, the famous retailer (Cowan, 1924; Filene, 1930; Hoyt, 1929/2000; La Londe and Morrison, 1967; Scully, 1996; Usui, 2008). In effect, what these individuals wanted to achieve was the transformation of the 'art' of salesmanship into a science of selling (Strong and D'Amico, 1991). This required a shift in understanding of salesperson characteristics. Where once it was thought that salespeople were innately predisposed to and skilled at selling, now marketing thinkers believed salespeople could be created through appropriate courses of training and instruction.

Hoyt, for example, in his 1913 text, *Scientific Sales Management*, outlined the various ways in which sales management could be made more efficient, and most of the ideas he enunciated revolved around the idea of standardisation (as did Taylor's system) (Hoyt, 1929/2000). In an effort to standardise sales activities, Hoyt suggested that 'If we analyze the sales job we have gone a long way toward finding out how to do it. If we break the job up into its component parts, we discover new tools to hasten the process and increase volume' (Hoyt, 1929/2000: 24). Firms also rationalised their production processes, discontinuing the manufacture of unprofitable lines, thereby enabling their salespeople to focus on the most profitable product ranges. And in line with a sales orientation (see the Box on p. 38) 'sales volume' was an important criterion against which to measure business practice. But it was not the sole objective: 'Given the job of keeping a factory operating profitably at capacity throughout the year, obviously sales volume is the first requirement' (Cowan, 1924: 76; cf. Strong and D'Amico, 1991: 232). Profit targets were also important (Usui, 2008).

In addition, sales management, it was claimed, could be made more effective if the routes salesmen travelled across their sales territories were planned using the optimal transportation options and if their sales 'patter' or talk was standardised. We should be clear here: this is not to suggest that each and every salesman was given one sales talk that they repeated without modifying. They were given broad outlines of what might be a good way of presenting a given product, but each 'individual salesman is expected and taught to use the words which come to him naturally' (Cowan, 1924: 84).

Sales talk standardisation was possible because although each customer had their own individual personality and thus was likely to respond to the sales pitch in slightly different ways, ‘Extensive experiences show that on the average human nature is much the same, and that the difference between individuals is not nearly as great as the degree of likeness’ (Cowan, 1924: 84). The function of management from this perspective was to produce sales pitches that were likely to appeal to the mass of consumers. In other words, and here we see the contribution of Taylor’s ideas, management had to try to develop the ‘one best sales story’ for use in the field. According to Cowan (1924: 84), doing so was ‘a result of research and experiment, and it involves planning a basic method of sales. The salesman, therefore, must be selected with respect to their ability to comprehend the basic method, and their ability to utilize it in personal contact with buyers’. Moreover, management needed to convince otherwise largely ‘freewheeling commissioned salespeople’ that they needed management’s help in devising their travelling schedules and sales talks (Strong and D’Amico, 1991). One way of doing this was to suggest that salespeople might make more money if their everyday sales activities were better structured.

Although Taylor’s work was criticised by some (Graham, 2000), it was influential in marketing and advertising (Scully, 1996), with many of the respondents surveyed by Paul Converse in the early 1940s acknowledging its impact on their thinking (Converse, 1945). This said, gradually there was a movement away from a limited focus on sales management activities (Strong and Hawes, 1990), that is, from a focus on supply side efficiency issues, to a greater emphasis on consumer needs, wants and desires (White, 1927). This was in part a natural shift in business practice that reflected the fact that as markets became ever larger, and producers ever more distant from their ultimate consumers, that some activity was required to allow manufacturers to maintain contact with their customer base. Marketing research consequently gained a foothold in industry. see the Box below.

The Key Characteristics of the Production, Sales and Marketing Eras (modified from Jones and Richardson, 2007: 18)

Production Era (according to Keith (1960) this ran from 1870–1930)

- P1. Demand exceeds supply. There are shortages and intense hunger for goods.
- P2. There is little or no competition within product markets (between firms selling the same goods to the same markets).
- P3. The company, not customers, is the centre of focus for a business.
- P4. Businesses produce what they can produce and focus on solving production problems.
- P5. Businesses produce limited product lines.
- P6. Products sell themselves. Wholesalers and retailers are unsophisticated in their selling and marketing.
- P7. Profit is a by-product of being good at production.

Sales Era (according to Keith (1960) this ran from 1930 until 1950)

- S1. Supply exceeds demand.
- S2. There is competition within product markets.
- S3. Businesses are conscious of consumers’ wants, and some market research is done.

- S4. Businesses must dispose of the products they produce and therefore focus on selling.
- S5. Businesses produce limited product lines.
- S6. Hard selling is necessary, backed by advertising.
- S7. The primary goal of the firm is sales volume; profit is a by-product.

Marketing Era (according to Keith (1960) this ran from 1950 onwards, turning into an era of 'marketing control' in the late 1950s early 1960s)

- M1. Supply exceeds demand.
- M2. There is intense competition within product markets.
- M3. The customer is at the centre of a company's business; the purpose is to satisfy customers' needs and wants.
- M4. Customers determine what products are made. Businesses focus on marketing problems.
- M5. Businesses produce extensive product lines.
- M6. A wide range of marketing activities is used and coordinated to satisfy customers' needs.
- M7. Businesses focus on profit rather than sales volume.

Shaw (1912: 755), for one, bemoaned business people who did not study the marketplace in a careful, systematic manner, despite 'investing tens, even hundreds, of thousands of dollars in a selling campaign'. Systematic understanding of buyer behaviour was vital (Kitson, 1923; Muir, 1924; Starch, 1923; Weaver, 1935): management needed to understand what products the marketplace demanded, if they were to scientifically manage their levels of production in line with likely consumption (Schell, 1930; White, 1927). Again, these ideas were not totally radical departures for business, as similar views were expressed with increased frequency from the late nineteenth century onwards (Jones and Richardson, 2007; Laird, 1951; Lockley, 1950), although this is not to say that all companies listened to their customer base, and acted upon the marketing intelligence that was available (Elder, 1932).

Even so, the attentiveness of industry, marketing academics and consultants alike to the consumer and their desires generally passes unacknowledged. Notwithstanding this, ideas associated with the marketing concept were surprisingly widespread during the 1920s and 30s and probably for quite some time before, as we discuss further in Chapter 4 (Fullerton, 1988; Hollander, 1986; Jones and Richardson, 2007). During the 1920s and 30s, however, there was a definite shift in some books from thinking about the sales manager as just involved with organising the sales force, to them taking on roles much more consistent with the modern marketing manager. As Strong and D'Amico (1991: 232) highlight in reference to a text published by J. George Frederick in 1919:

Frederick's sales manager was concerned with product quality and new product development as determined by the needs of the market. It was the sales manager's job, he wrote, to synchronize the standardization needs of production with the market's demand for a varied product line. Sales management had begun to evolve from the narrow supervisory role of the pre-1920 era to a broader one embracing the marketing concept, though not, as yet, so labelled.

In conjunction with this new role for the sales manager, we can also say that marketers were very interested in producing more expensive products, either for the business-to-business market or as ‘specialty goods’, in a way that reflected consumer requirements most closely (Shaw and Jones, 2005; Tadajewski, 2009b; Tadajewski and Saren, 2009). This said, the reason why it is often claimed that marketers only started to pay attention to customer needs and wants in the 1950s is due to a paper that appeared in the *Journal of Marketing* written by an executive at the Pillsbury Company.

Robert J. Keith’s article was based on changes in business and customer relations that characterised the history of the company where he worked: The Pillsbury Company. He maintained that his firm was currently revolutionising the way they thought about marketing and sales management. Marketers were no longer producing whatever products they could manufacture, just because they possessed the manufacturing capacity and skill to do so, as would have been the case if they had been ‘production’ oriented: ‘In today’s economy the consumer, the man or woman who buys the product, is at the absolute dead center of the business universe. Companies revolve around the customer, not the other way around’ (Keith, 1960: 35).

Importantly, Keith argued that his case study was generalisable to the rest of the ‘business universe’. This is a problematic statement for a number of reasons. Firstly, General Electric is considered the first company to fully implement the marketing concept by many. So Keith’s attempt to claim first mover status is slightly questionable. With respect to his claim to generalisability, we should note that Keith presented an American case study that does not reflect the nature of business practice around the world, most notably in Spain (see the Box below).

Voices - Marketing in Spain: On Not Transplanting American Marketing Methods

As we mentioned above, there is often a very pronounced American bias in much published marketing scholarship. America is the archetypical consumer society; many of the most well-known marketing journals are American and thus our knowledge about marketing and consumer research necessarily reflects this bias. We also often hear about how American marketing practices have slowly but surely spread across the globe. Keith (1960) talks about a ‘marketing revolution’ taking place that he implies many companies will follow, presumably in whatever country they hail from. Yet, as García Ruiz (2007) documents, there is often widespread cultural antipathy to marketing, especially in Spain.

Like some merchants in medieval times (Dixon, 2008; Strong and D’Amico, 1991), marketers in America (Farmer, 1967) or advertising practitioners in Germany (Berghoff, 2003), marketers in Spain were looked down upon. It was not a profession many wanted to be associated with; the treatment of consumers left much to be desired and until ‘the late 1980s, less than ten percent of firms had implemented a marketing strategy’ (García Ruiz, 2007: 367). Even before this time, those interested in marketing were aware that although American forms of marketing practice were useful, these needed to be modified to fit with the cultural context in which a company was operating. And the first marketing conference in Spain in 1963 was brought to a close by Pedro Gual Villabí, Minister and President of the National Economic Council stating that Spanish firms should ‘not imitate. We talk a lot about the American or the German methods, for example. They are

fine and they are interesting. However, each country has its own methods, because the behaviour of people naturally agrees with national idiosyncrasies, temperaments, their environment, all of which are very difficult to transplant. Of course, any rule or model should not be considered universal. We, the Spaniards, are very opposed to wearing foreign clothes!' (García Ruiz, 2007: 372).

A further criticism is that other writers working around the same time as Keith (1960) argued that the theoretical debates surrounding various 'business philosophies' were not new. They were further developments of arguments already found in the historical record (Borch, 1958). Academics and practitioners had even before General Electric implemented what was later called the marketing concept, discussed positioning the customer as the 'fulcrum' – to use Borch's term – of business activities; Percival White's (1927) work being a key example. But, let us move on, leaving this focus on the intellectual priority debates around the marketing concept to one side. We will come back to them in Chapter 4.

What these examples should tell us is that more often than not, when we read the original publications of some of the key thinkers in marketing or look at specific examples of marketing practice, we find their arguments demonstrate more nuance than they are given credit for; the case of Fred Borch's work on the marketing concept is a good example of this. Borch appreciated the value of a customer orientation, but he remained convinced of the value of some of the tactics associated with a sales orientation. We should not, he said, simply produce products and hope that the customer will seek them out. We should actively promote our goods. Marketing practice, on this reading, is not just about responding to customer desire, but about stimulating it.

1.7 Demand Creation and Marketing Research

Marketing, we can say then, is concerned with what has varyingly been called 'demand creation' (A.W. Shaw in Usui, 2008; Doubman, 1924), 'demand activation' (Copeland, 1958) or 'demand generation' (Shaw and Jones, 2005), with one scholar going so far as to associate marketing with propaganda and 'the conditioning of buyers or sellers to a favorable attitude' (Shaw and Jones, 2005: 247). 'Marketing students', Converse (1951: 3) attested, 'are interested in increasing or stimulating human wants, in general and for the good of individual sellers. This leads them to the study of advertising, salesmanship, and merchandising, marketing research and packaging'.

Since marketers were actively interested in selling to consumers, and have often tried to adopt the customer's viewpoint in an effort to produce those goods and services likely to appeal to their target market for quite some time, why, we might ask, was marketing practice increasingly viewed in more favourable terms in the boardrooms of large companies only really in the 1950s? It appears that this is attributable to the Second World War (Tadajewski, 2009a).

As was the case with the American Civil War (Appel, 1911) and the First World War (Usui, 2008), the Second World War led to a massive expansion of industry, based on the orders placed by the Army, Navy and other wartime bodies. One observer

stated ‘that the end of the war will find the United States with the greatest productive capacity that it has ever had. In the United States, new plants have been constructed and old plants converted to augment enormously the flow of commodities. New processes have been developed and have been introduced; ideas that once seemed visionary have been made realities and have increased production in an unheard of degree’ (Tosdal, 1941: 75).

Since the postwar world was going to represent probably the most competitive landscape business had ever seen, the blossoming romance with the consumer turned into organisational infatuation for some. Understanding the consumers’ needs, wants and desires became a priority. At the same time as the marketing concept was being further diffused throughout large companies across the United States (Moore, 1957), marketing scholars themselves remained embroiled in a debate that began roughly in the 1920s and continues until the present day (Szmigin and Foxall, 2000). This dispute centred on the idea of whether marketing was an art or a science. Science, of course, sounds slightly more academically legitimate; and ‘marketing science’ is likely to be more respectable and useful as a rhetorical tool in boardroom debate.

1.8 Art or Science

In view of what we now know about the attempts to turn the art of salesmanship into a science, the ‘art or science’ debate of the 1950s can be considered an extension of earlier concerns. This debate raged throughout the 1950s, having been stimulated by Paul Converse (1945). Some academics sidestepped the issue (Converse, 1945); others offered an implicit affirmation of the idea that marketing was a science (Alderson and Cox, 1948; Bartels, 1951a; Brown, 1948); and others still questioned whether marketing was scientific, given that certain aspects of marketing, especially the development of advertising, product innovation and planning (Cannon, 1980) required creative flair and artistic sensibilities (Stainton, 1952).

Bartels, for one, was not convinced that marketing had achieved scientific status. He said that since the discipline was still a comparative infant in relation to other academic subjects, that we were being over-optimistic to assume that marketing was a science, as yet. When he reviewed the literature, his caution was confirmed. There was a conspicuous lack of the scientific devices that we would have expected were marketing a science (i.e. no real marketing theories, principles and law-like generalisations that an accredited science should have possessed). This said, he did see some scholars using the scientific method (they developed hypotheses which they then either supported or refuted through empirical research) (Bartels, 1951: b). Even so, other scholars, after examining the marketing literature, saw little change in scientific style from the earliest days in marketing thought, claiming that marketing scholarship remained wedded to a ‘thoroughgoing empiricism’ (Buzzell, 1964: 33). Research was still largely descriptive and qualitative.

Here we have broached a key issue. Buzzell (1964), for example, is critical of the use of qualitative methods in marketing. This is not simply a comment from nowhere. It was a debate that ran far deeper in the marketing community than the vague gesture above can do justice and was marked by often quite bitter exchanges between two groups of scholars. On the one hand there were those who subscribed to ‘positivism’ versus those inclined toward interpretive approaches, using psychological, psychoanalytical and anthropological thought to understand consumer behaviour.

1.9 Positivism and Motivation Research

Generally speaking, ‘positivist’ research is interested in the prediction or explanation of consumer behaviour, often using large scale survey research and quantitative methods to produce generalisations about what kinds of behaviour a given population of people will engage in. By contrast, for ‘motivation research’ and ‘interpretive research’, a common aim is ‘understanding’ ‘why’ people engage in certain forms of consumer behaviour (Hudson and Ozanne, 1988; Tadajewski, 2006). A key figure in the debate between the proponents of motivation research and the ‘positivists’ was Ernest Dichter who was one of a number of influential scholars and practitioners who migrated to the United States from Europe just prior to, and during the second World War, who revolutionised aspects of academia and business practice (see the Box below).

Food for Thought – Marketing and Consumer Research in Europe

As noted previously, historical evidence indicates that there were courses in business and marketing in Germany before the United States (Jones and Monieson, 1990). Extending this line of thought Fullerton (1994, 2009) has examined marketing and consumer research practice, as well as the theoretical underpinnings of research in Europe, and argued that whilst European scholars like Wilhelm Vershoffen and H.F.J. Kropff did appreciate the important contributions made by American scholars and practitioners, the work of people studying consumer behaviour in Germany was often equally advanced, if not more so in some cases.

Most notably, Fullerton pointed to the work conducted by Paul Lazarsfeld at the Office of Economic-Psychological Research at the University of Vienna (1927–1934), along with that undertaken under the auspices of the Society for Consumer Research affiliated with Nuernberg University. The first of these was heavily influenced by a variety of streams of theoretical thought including ‘social psychology, Marxism, Freud, behaviorism, introspection, statistics, and psycholinguistics’ (Fullerton, 2009: 97). Paul Lazarsfeld, arguably one of the most influential marketing and communication scholars of his generation, was one of the pioneers of consumer research. He was convinced that through careful, detailed interviewing that the reasons that lay behind any given purchase could be established. He later moved to the United States when the political climate in Austria turned particularly ugly, and with Ernest Dichter, Herta Herzog and others, played a key role in further diffusing interpretive and qualitative approaches in marketing and consumer research.

Unfortunately, the Second World War brought much of the advanced marketing and consumer research taking place in Germany and Austria to a resounding halt. Nevertheless, according to Berghoff (2003) some commentators working in Germany during the run up to the Second World War believed that Third Reich policies were going to have a beneficial effect on the way Germans viewed advertising practice. On the one hand, working in advertising was generally frowned upon, being seen as an undesirable job. The Third Reich was, on the other hand, well known to be very interested in the role of advertising in mobilising political support for its policies (the work of Freud’s nephew, the pioneering public relations guru, Edward Bernays, was of great interest to the Nazi propagandist, Joseph Goebbels).

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The German Advertising Association, as a case in point, 'put a portrait of Hitler on the cover of its official organ and saluted the man who 'is Germany's greatest advertiser, selfless in duty and whom we are all beholden follow. From now on advertising must accord with his vision' (in Berghoff, 2003: 131). At the same time, as a stern political regime, it was willing to legislate against and prosecute inappropriate forms of advertising (e.g. misleading advertising) and this, observers at the time thought, would lead to improvements in industry practice, and consequently improvements in the public perception of advertising. As Berghoff appreciates, there was some degree of validity to these views. The German authorities did clamp down on certain advertising practices. Yet, they also prohibited talented advertising practitioners from working out of racism and myopia simply because they were Jewish or otherwise seen as undesirable from the point of view of the authorities.

However, advertising practitioners are nothing if not creative and opportunistic. In Germany advertisers quickly took creative inspiration from the Nazi authorities: 'there was an onslaught of swastikas and Hitler portraits being used in advertisements. Exploitation and tastelessness knew no bounds. Aprons and scrub brushes adorned with swastikas flooded the market, as well as playing cards ornamented with the heads of top Nazis. Butchers decorated their front windows with busts of the Führer carved from pig lard, and bakers cut swastikas into their dough. The catchphrase, 'It is the Führer's desire', was used for virtually every product. Sales representatives donned Stormtrooper uniforms in order to impress their clients' (Berghoff, 2003: 138–9). The Nazis were not especially impressed by advertisers jumping on this bandwagon: 'for it trivialised National Socialism's central symbols and even made them look silly' (Berghoff, 2003: 139). They therefore made it illegal to use the logos and symbols associated with the party without proper consent. Recalling the comments above, then, consumer research in Germany was theoretically and practically sophisticated and it should come as no surprise that 'Advancing the theoretical tools for this [German] propaganda [in the years before the second World War were economists from the Nuremberg Institute for Economic Research and Nuremberg's Society for Consumer Research' (Berghoff, 2003: 142).

In his work, Dichter essentially translated psychological theory and concepts into marketing and consumer research. By contrast to those scholars who used experimental, usually statistical forms of research, Dichter claimed such methods were outdated and could not give an accurate picture of consumption behaviour. By asking consumers direct questions, he pointed out that you are likely to receive socially desirable responses from them (i.e. if a consumer enjoys looking at naked pictures in a magazine which they frequently buy, they might still tell the interviewer that they buy it because of the informative stories (Dichter, 1979)).

Sketching the ontology, epistemology, axiology and view of human nature that the motivation researchers subscribed to, we can think of it in the following terms:

- Regarding the nature of reality (ontological assumptions) held by the motivation researchers, they saw consumer reality, that is, the consumer society and our place in it, as essentially socially constructed. There would be multiple factors that impact on how we act and which shape our consumption choices, but as individuals we can still exhibit a degree of agency. In other words, the society in which we live might set certain boundaries and the motivation researchers may have tools that can unpick our deepest desires, but we can refuse to be

constrained or influenced by them. The consumer, to use the language deployed in Chapter 3, is still sovereign in the market.

- Regarding axiology, that is, the overriding goals that underpinned the production of motivation research, they were interested in ‘understanding’ consumer behaviour. Understanding, they said, was a necessary precondition for explaining and predicting how consumers will act, if indeed this was possible with any degree of certainty (Krugman, 1956–7).
- Epistemologically, the motivation researchers adopted a largely ideographic approach. This means that they believed ‘that one can only understand the social world by obtaining first-hand knowledge of the subject under investigation. It thus places considerable stress upon getting close to one’s subject and exploring its detailed background and life history’ (Burrell and Morgan, 1979/1991: 6). Unlike conventional interpretive research (e.g. Thompson et al., 1989), the motivation researchers did not trust the responses provided by those they questioned. People, they thought, rationalise their consumption and buying behaviours. Researchers therefore needed to use indirect methods of accessing consumer subjectivity.
- The above point with respect to epistemology links with the overriding goal of motivation research: it seeks understanding, hence is ideographic (Burrell and Morgan, 1979/1991). Motivation research is concerned with understanding consumer subjectivity, that is, how a consumer (as part of a wider sample of people) perceives specific consumption behaviours (e.g. smoking). Motivation researchers want to look at the world through the consumer’s eyes, as far as this is possible.
- The view of human nature that motivation researchers supported is already hinted at above. They are interested in consumer subjectivity and agency (how we understand the world, how we act in it) and thus require consumers to be ‘co-participants’ in any research being undertaken (the researcher is not in charge of the research – they have to listen and explore the topic with their research partner – the individual consumer). This does not mean that motivation researchers tell the ‘co-participants’ about the subject they are interested in exploring; there is a good reason for this, as they want to minimise any potential bias.

1.9.1 The Decline of Motivation Research

By the early 1960s, motivation research was – at least in academia – in decline. In business practice, it continued to provide its key advocates with a lucrative income. Within the business school though, it was never an especially popular subject, having had its scientific credentials examined by a variety of commentators in prominent journal publications and been criticised. But it did not disappear completely. Rather it was translated into psychographics. Admittedly that is putting it a little simply. Marketing scholars raided motivation research for its methodological tool box (qualitative methods) as well as for various strains of psychological theory, which were then used to improve market segmentation techniques (general personality traits and demographic information was used). This shift from the use of interpretive research and qualitative methods is, we should add, a theoretical microcosm of much wider changes in business education and research which had shifted in response to the growing calls for more academic rigour that were made throughout the 1950s and accelerated into 1960s. But these are issues that we will explore in Chapter 2.

1.10 Conclusion

This chapter has introduced the development of marketing as an academic discipline and business practice. Originally marketing was studied for a variety of reasons. One of the most important is that business people were increasingly aware that as their business enterprises expanded, and their production facilities became capable of producing ever larger quantities of goods, that they needed to find some way of selling these goods more efficiently. They did this by expanding the markets they served, creating demand where previously there was none. This is why marketing is often associated with demand stimulation. In equal measure marketing scholars and practitioners legitimised their activities on the basis of satisfying customer needs (i.e. the marketing concept). Part of the legitimisation strategy used by marketers was their attempt to demonstrate how their marketing activities added value; they did this by demonstrating that distribution costs were reasonable and that middlemen, including distributors, agents and retailers among others, deserved to be compensated for their activities (Shaw and Jones, 2005).

Early in the history of marketing, there were a variety of different strands of scholarship and multiple schools of marketing thought (see Shaw and Jones, 2005). A few writers and practitioners were heavily influenced by the work of Frederick Winslow Taylor and his writings on scientific management. These were used to make sales-force management more efficient. Others aligned themselves with issues of social and distributive justice as a function of their scholarly training in Germany and interest in the work of the German Historical School. From this resulted a debate between neo-classical economics-influenced marketing scholars and the German Historical School which forms the intellectual foundation for the first ‘paradigm debate’ (see Jones and Monieson, 1990). This was followed by the vigorous debate on the idea of whether marketing was an art or science. Developing out of these discussions were similar arguments between the ‘positivist’ marketing scholars and those influenced by more interpretive, qualitative studies. These issues would continue to exercise scholars in the period from the late 1980s until the present and we turn to these in the next chapter.

1.11 Learning Activities

The history of marketing is shown in this chapter to be subject to claims and counter claims. Despite the questions that arise from this, the critical point is that the idea of marketing is neither stable, modern nor constant. Both of the activities below will enable you to explore key themes within the chapter in far greater detail and assist you in framing the debate and situating these arguments into a clearer context. Before you begin the learning activities remind yourself of the learning objectives for the chapter, so that your time and efforts are focused.

Activity 1: An American Affair in Germany

The chapter locates the origins of contemporary marketing with the German Historical School. How does the approach taken by the German Historical School differ from that of managerial marketing scholars and practitioners? You may want to begin trying to answer this question by reading Desmond and Crane, (2002)

Activity 2: Taylorism and Customer Orientation

If you were a salesperson working under the Taylorist influenced system of scientific salesmanship, would the fact that your employer encouraged 'sales contests' whereby salespeople competed to secure the maximum number of customers have encouraged you to be customer oriented or not? To begin thinking about this question read Strong, and D'Amico, (1991).

Further Reading

La Londe, B.J. and Morrison, E.J. (1967) 'Marketing management concepts yesterday and today', *Journal of Marketing*, 31(1): 9–13.

La Londe and Morrison introduce early figures in the history of marketing thought, and question taken-for-granted ideas about when the practice of marketing management first appeared.

Benton, R. (1987) 'The practical domain of marketing: The notion of a 'free' enterprise economy as a guise for institutionalized marketing power', *American Journal of Economics and Sociology*, 46(4): 415–30.

Benton asks us to question the idea that companies are interested in responding to the consumer, suggesting instead that perhaps key marketing ideas serve as ideological blinkers that redirect attention away from unequal power relations in the marketplace.

Tadajewski, M. (2010) 'Reading "the marketing revolution" through the prism of the FBI', *Journal of Marketing Management*.

Tadajewski examines the argument made by Keith in his seminal 1960 paper and argues that Pillsbury's development of a marketing orientation is not quite as clear cut as Keith maintains. Instead, Pillsbury were involved in anti-competitive business practices that are not consistent with a marketing and customer focus.

Sage Online titles

Shaw, E.H. and Jones, D.G.B. (2005) 'A history of schools of marketing thought', *Marketing Theory*, 5(3): 239–81.

In this paper Shaw and Jones introduce the major schools of marketing thought: marketing functions, commodity, institutional, interregional, marketing management, marketing systems, consumer behaviour, macromarketing, exchange, and marketing history schools respectively.

Wilkie, W.L. and Moore, E.S. (2006) 'Macromarketing as a pillar of marketing thought', *Journal of Macromarketing*, 26(2): 224–32.

Wilkie and Moore examine the history of marketing thought and find that earlier marketing scholars adopted a far more macromarketing perspective than is often recognised by mainstream marketing commentators. They were interested in distributive justice, ethics and the impact of marketing on society and society on marketing.

Jones, D.G.B. and Richardson, A. (2007) 'The myth of the marketing revolution', *Journal of Macromarketing*, 27(1): 15–24.

Critically examining the argument made by Keith (1960) that marketing suddenly focused on consumer needs, wants and desires in the 1950s, Jones

- and Richardson assert that Canadian marketing practitioners have long registered the importance of the customer when making production decisions.
- Monieson, D.D. (1988) 'Intellectualization in macromarketing: A world disenchanting', *Journal of Macromarketing*, 8(Fall): 4–10.
- Monieson argues that over the history of marketing thought, marketing has become increasingly 'intellectualised'. Put simply, issues of ethics and social responsibility have been jettisoned from their central role in marketing theory and practice. As marketing is a human science, such values should be the foundation, along with distributive justice, of the discipline, Monieson says.
- Tadajewski, M. (2006) 'Remembering motivation research: toward an alternative genealogy of interpretive consumer research', *Marketing Theory*, 6(4): 429–65.
- Tadajewski scrutinises the 'received wisdom' found in the history of marketing thought that interpretive consumer research first appears in the 1980s. By contrast, he asserts that such ways of thinking about and conceptualising the consumer were found much earlier in the development of marketing theory and practice in the form of 'motivation research'.

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