

Periodization in Marketing History

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This article explores some of the purposes, advantages, problems, and limitations of periodizing marketing history and the history of marketing thought. A sample of twenty-eight well-known periodizations taken from marketing history, the history of marketing thought, and business history is used to illustrate these themes. The article concludes with recommendations about how to periodize historical research in marketing.

Keywords: *marketing history; history of marketing thought; historiography; periodization*

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's [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. The exception is where historical research is used to describe a specific event in time with no comparison, explicit or implicit, to another era. In the latter case there is no opportunity for periodization. However, most historical writing is chronological and benefits from periodization. Stowe (1983) particularly notes that Bartels (1976) uses the idea of periodization for the various subjects 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). Despite this, most of us probably use periodization without giving much thought to our approach or technique.

In this article, we describe some basic approaches to, and techniques of, periodization in marketing and explore some of the purposes, advantages, problems, and limitations of periodizing marketing history and the history of marketing thought. The distinction between marketing history and the history of marketing thought is somewhat problematic. Following Bartels (1976), most marketing historians imitate the practice in economics of separating the history of practice from the history of thought as in the distinction between economic history and the history of economic thought. Even in that imitation, however, marketing academics have traditionally not been as involved in leading practice as have economists in leading economic policy. Business people create most of the innovations in marketing practice, and therefore, we believe that a true history of marketing thought should include marketing history. But that is a subject for another time.

Within the history of marketing thought, it is also useful, but somewhat contentious, to distinguish between the history of marketing ideas and the history of the marketing discipline. The former has been traced to the ancient Greeks (Dixon 1979; Shaw 1995) through the medieval ages (Dixon 1980) to the present time, whereas most marketing historians agree that the latter can be dated only to the turn of the twentieth century (Jones and Shaw 2002). Thus, as Stowe (1983) has pointed out of the histories of marketing thought by Grether

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Author	Year	Focus	*	10th Century	11th Century	12th Century	13th Century	14th Century	15th Century	16th Century	17th Century	18th Century	19th Century	20th Century	
STAGE THEORIES															
Polanyi	1957	Societal Provisioning Agreements	INF	Reciprocity Mutual Gift Giving Equivalency Concept	Redistribution Collection and Ration of Resources - Benefits Proportional to Contribution	Householding Aristocratic Self-Sufficiency	Marketless Trade Collective Exchange - Exchange by Treaty/Pact Administered Prices				Market Local		Market National	Decline of Markets Introduction of Regulation Free Markets Clash with Social Values	
Bohannon & Dalton	1962	Markets and Marketing Africa	INF			Self-Sufficiency		Marketplace Central			Market Principle				
Clark	1940	Economic Development	INF				Primary Occupation Extractive & Rudimentary Agriculture			Secondary Sophisticated Agriculture & Basic Manufacturing			Tertiary Sophisticated Manufacturing & Services		
Hotchkiss	1938	Marketing	INF	Hunting	Pastoral			Agricultural					Industrial		
PERIODIZATIONS															
Beard	1938	Business W. Europe & U.S.	EXP	Heritage of Antiquity				1100's - 1700's Patrician City-Ruler				18th Century Monopolist	1800-1914 Individualist	1914+ Organization Makers	
Kuznets	1966	Economic Innovation	EXP	Feudal Organization	11th-15th century City Economy Epoch				15th - mid 18th Century Merchant Capitalism			Mid 18th Century Scientific			
Gras	1939	Business Economic Development	EXP	Collection Economy	Cultural Nomadic Economy	Settled Village Economy	Petty Capitalism Peddlers, Shopkeepers	Mercantilism			Industrial Capitalism		Financial Capitalism	National Capitalism	
Bucklin	1972	Retail Market Structure	EXP	Periodic Markets	Permanent Markets	Fragmented Markets					Vertically Integrated				
Bucklin	1972	Wholesale Market Structure	EXP	Periodic Markets			Permanent Markets					1800-1850 Fragmentation	1850+ Functional		
Hotchkiss	1938	Marketing	EXP	Periodic Markets			1100 - 1300 Free Towns	14th Century Merchant Guilds	14th-16th Centuries Craft Guilds		17 th - 18 th C Regulated Trading Companies	18th Century Mercantilism	Industrial Revolution	1873+ Large Scale Retailing	1920-1930's Merchandising Era
Levett	1929	Consumerism Great Britain	EXP				13th-14th Century Village Craftsmen	14th Century Guild	15th Century Sumptuary Laws Merchant Guilds	16th Century Pure Consumers Middleman	18th Century New Shopkeeping				
Rostow	1965	Economic Development	EXP				Traditional Society				Late 17th - Early 18th Century Pre-conditions for Growth	1780 Britain Technology Stimulus to Growth	1850 Britain Drive to Maturity	1937 Britain High Mass Consumption	
Fullerton	1988	Marketing W. Europe	EXP						1500 Era of Antecedents		1750 Era of Origins		1850 Era of Institutional Development		1930 Era of Refinement & Formalization
Porter & Livesay	1971	Marketing & Distribution	EXP								Colonial-1815 All Purpose Merchant		1815-1870 Specialized Wholesaler	1870+ Manufacturer	

FIGURE 1 STAGE THEORIES AND LONG PERIODIZATION
NOTE: INF = inferred; EXP = explicit.

(1976) and by Converse (1959b), the history of the marketing discipline may as yet defy any meaningful periodization but rather benefit more from organization by ideas, thinkers, subjects, and schools of thought. Nevertheless, in the concluding segment of this article, we offer some suggestions about how marketing history as well as the history of marketing thought should be periodized. We hope at least that this article promotes some consideration of the way marketing historians periodize history.

We reviewed a considerable number and wide range of available periodizations from both marketing and nonmarketing sources with a view to considering the consistency and diversity as well as the appropriateness of some of the more popular versions. Figures 1 and 2 summarize the sources from which these periodizations are drawn. These are not intended as a survey of all periodizations in marketing history. Instead, they are a collection based on sixty-five years of formal academic study and research in the field with a strong interest in how its history has been depicted. They constitute what in old-fashioned terms would be called “a representative collection” that seeks to give full voice to an all important and prominent approach to that history. They are intended to represent the diversity of schemes that have been used and to illustrate periodization techniques and problems. Figure 1 includes several stage theories that are distinguished from periodizations below, as well as histories with periodizations of a century or longer. Figure 2 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 Bartels’s (1976) “general marketing” and “advertising” periodizations. More importantly, much of the general public, and at least some social scientists, tends to treat *advertising* and *marketing* as fairly interchangeable terms, and therefore, many of the popular advertising histories deal more broadly with marketing. In general, however, our discussion ignores periodizations of the history of other subfields of marketing such as marketing research, supply chain management, wholesaling, retailing, and so on. Bucklin’s (1972) work, which takes a very broad view of wholesale and retail distribution, is an exception. For those sources in the figures 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. Figure cell divisions with a dotted line indicate periods which overlap.

There seems to be a great diversity of opinions about the pattern of periodization in the history of marketing and marketing thought. Even when the periodizations in Figures 1 and 2 are grouped by common subject focus (e.g., marketing thought, advertising, etc.), there is little evidence of commonality among them. Consider, for example, the marketing thought periodizations in Figure 2 by Jones and Shaw (2002), Sheth and Gross (1988), Lazer (1979), Jackson (1979), and

Author	Year	Focus	Pre-1860	1870	1880	1890	1900	1910	1920	1930	1940	1950	1960	1970	1980	1990	2000
Converse	1959	Marketing U.S.	EXP	1860-1900 "Drummers" or Wholesalers	1900-1917 High Cost of Living	1915-1920 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation						
Mayer	1989	Consumer Protection	EXP	Pre-1860's Fragmentation	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Tedlow	1990	Marketing U.S.	EXP	Pre-1860's Fragmentation	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Chandler	1959	Business	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Keith	1960	Business	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Morishita (Usui)	1959	Business Japan	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Jones & Shaw	2002	Marketing Thought	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Sheth & Gross	1988	Marketing Thought	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Lazer	1979	Marketing Thought	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Jackson	1979	Marketing Thought	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Bartels	1976	Marketing Thought	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Jones & Monteson	1990a	Marketing History	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Kerin	1996	Marketing Thought	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Goodman	1986	Marketing Thought	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Fox	1984	Advertising	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
O'Guinn Allen & Semenic	2002	Advertising	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Pope	1983	Advertising	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Polay	1985	Advertising	EXP	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				
Gross & Sheth	1989	Advertising	INF	1815-1850 Growth of National Market	1860-1870 Railroads	1870-1910 National Distribution/Standardization	1910-1917 High Cost of Living	1917-1921 WWI & Great Depression	1920-1929 New Industrial Revolution	1930-1939 Desire for Security	1940-1946 WWII	1945-1959 Gadget Economy	1960-1970's Product Proliferation				

FIGURE 2 SHORT PERIODIZATIONS

NOTE: INF = inferred; EXP = explicit; WWI = World War I; WWII = World War II; R&D = research and development.

Bartels (1976). There is little agreement there on the significant time periods in the development of marketing thought or on the themes of periods, even among the latter, which are approximately similar in time period. A similar result is evident in the advertising periodizations at the bottom of Figure 2. In fairness, the specific focus in the latter studies varies within advertising, where, for example, Pollay (1985) focuses more broadly on advertising strategy and Gross and Sheth (1989) focus more specifically on the time orientation within advertising strategy.

Our point here is simply that we might expect at some level to see more agreement among marketing historians about the periods used in marketing history and the history of marketing thought. This could be considered a sign of the field's immaturity. It could also be interpreted as an indication of its vitality. Vigorous debates about periodization 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), Nevett (1991), and Twede (2002) 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 preclassical 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 (1976), place a starting date even later, at the beginning of the twentieth century. 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 or not it deserves to be called marketing.

Periodization and History

History consists of a record of a series of events that are responses by actors to sets of options posed by the context within which those events occurred. Since the contexts cannot be completely specified, and the mind sets of all the actors certainly cannot be specified, responses cannot be considered deterministic. The study of history is the study of both continuity and change. It goes beyond mere chronology. It seeks to explain phenomena that are examined within their contexts. Thus, periodization should mark important turning points in time. In doing so, it provides several advantages over simple chronology. It summarizes and structures historical research. It provides a number of cases (i.e., the individual time segments) that can be used for comparative analysis to identify similarities and differences between periods. 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. Periodization facilitates understanding by breaking history into smaller chunks, by focusing the reader on specific time spans, and at the same time by promoting easier recall. Periodization can also impose parameters on historical investigation by identifying criteria or principles that allow the historian to sort through masses of material and identify patterns.

Periodization and Stage Theories

Although there is a close relationship between the two concepts, stage theories should be distinguished from periodization. Stage theories in marketing hold that the processes encountered in one environment are a necessary prerequisite to comparable development in another venue or instance. Also, stages can be repeated in another instance, and therefore, dates in time can be less important than with periodizations. Such stage theories are illustrated by lifecycle analysis and, in the case of economic development, by the type of periodization expressed by Colin Clark (1940). Clark's economic stages are similar to the stages implicit in Hotchkiss's (1938) study of 1,500 years of market distribution. Both of these stage theories are included as part of Figure 1. However, overlapping Hotchkiss's implicit stage theory is an explicit periodization also summarized in Figure 1.

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.

THE METHODOLOGY OF PERIODIZATION

For our purposes here, there are two related but distinct methodological issues that come to mind when trying to describe how historians periodize their subject. At a fundamental level, periodization may be approached either inductively (ex post) or deductively (ex ante). Each approach presents a slightly different set of advantages and limitations that are explored below. In addition, there are several basic techniques used to periodize history, including the use of rigid calendar dates such as decades or centuries, context-driven

periods, and the use of turning points in the events themselves. Those basic techniques are also described in this section.

Ex Post and Ex Ante Approaches

Some authors who write about historical methodology in marketing journals 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) implicitly advocates an inductive approach that seeks to identify a pattern in the data. Most historians seem to be more comfortable with inductive methodologies and prefer to let the data speak for themselves (Kumcu 1987; Witkowski 2002). 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 headings in scholarly articles, 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 on 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 (see Figure 2).

On the other hand, the argument can be advanced that at least a rough sense of periodization can be useful for the historian before (*ex ante*) gathering data. Bentley (1996, 749) 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.

This *ex ante* approach is illustrated by Bentley’s (1996) use of cross-cultural interaction as the fundamental principle around which he organizes six periods in world history, each covering several centuries or more.

An example of *ex ante* periodization from Figure 2 is Bartels’s well-known categorization of the twentieth-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 (see Figure 2), which does not use a decennial periodization, yielding the so-called “marketing revolution” at Pillsbury is another example that 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 on the investigation and allows greater concentration. University 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 (1995) holds that ideally, any periodization plan should be based on an overarching 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.

Periodizing by Decade or Century

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’s (1976) well-known system of decennial periodization for general marketing textbooks (see Figure 2) and at the other extreme by Levett’s (1929) periods of consumerism in Great Britain (see Figure 1), which cover a century or more at a time. Indeed, many scholars use this technique of periodization, and that supposed collective wisdom is one argument in its favor. Smith (1998) allows that the decade, much like the century, is said to possess distinctive cultural characteristics. Quite simply, it is human nature to think in terms of decades or centuries in the absence of a more objective means of dividing time into understandable chunks and, in any case, is a more effective means of communication than leaving chronology as an uninterrupted stream of narrative. In some cases, it may facilitate comparisons of events or situations that do not otherwise obviously lend themselves to comparison. Few marketing historians use cliometrics (the quantification and statistical analysis of historical phenomena), but those who do seem to find fixed periods, usually decades, the most convenient way to present statistical results (e.g., Gross and Sheth 1989; Pollay 1985). In each of the cases just cited, the general reason for using fixed periods

would seem to be stylistic rather than some logic arising from the events themselves.

However, 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). Marc Bloch (1962) explains it in this way:

We tend to count by centuries. . . . We no longer name ages after their heroes. We very prudently number them in sequence every hundred years, starting from a point fixed, once and for all, at the year 1 of the Christian era. The art of the thirteenth century, the philosophy of the eighteenth, the "stupid nineteenth"; these faces in arithmetical masks haunt the pages of our books. . . . Unfortunately, no law of history enjoins that only those years whose dates end with the figures "01" coincide with the critical points of human evolution. (Pp. 181–82)

Stowe (1983) notes that even Bartels (1976) eschewed his decade-by-decade periodization when it came to the subject of advertising to permit historical analysis of influences that extended beyond his decade boundaries.

Kitson 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. As mentioned above, phrases such as "nineteenth-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"). Not surprisingly then, it is not uncommon for marketing histories with longer periods to use centuries. Most of the earlier periods in Hotchkiss's (1938) *Milestones in Marketing* (Figure 1) are centuries, despite the fact that some of the specific events that 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 Levett (1929) and Beard (1938), both listed in Figure 1.

Context-Driven Periodization

A second technique is to arrange material according to the occurrence of some external event, such as a change in the editorship of a scholarly journal as in Kerin's (1996) analysis of sixty years of publication by the *Journal of Marketing* (Figure 2) shortly after his own editorship ended or the invention of the computer, which influenced the development of marketing research (Stowe 1983). 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 and the influences that change in context had on marketing conditions and methods in England:

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, 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.

Periodization by Turning Points

A third technique relies on the important turning points in the material itself under review. Stowe (1983, 9) refers to this as "periodization as a function of the subject being studied." 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 (1959a) *Fifty Years of Marketing in Retrospect*. For example, he describes the period from 1900 to 1917 as the "high cost of living era" (see Figure 2) 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 (1988) revision of the history of modern marketing. His "era of origins" (Figure 1), which begins in the mid-eighteenth century in Europe and mid-nineteenth century in America, relied on changes in political, religious, and social forces that 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" (1988, 122), or the beginning of modern marketing.

PROBLEMS OF PERIODIZATION

As we mentioned earlier, periodization summarizes and structures historical material. In that way it facilitates understanding and memorization by breaking history into smaller chunks. It also creates a number of different but related sets of events that facilitates comparison across time. However, in that connection, there are some trade-offs and limitations

related to reductionism, duration of periods, consistency, and the false sense of progress that periodization often assumes.

Reductionism

The use of period designations, any 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 multifaceted chain. Perhaps for this reason, periodization has sometimes been characterized as a *passé* nineteenth-century technique (Ree 2002), although, as Figures 1 and 2 demonstrate, we have found numerous examples of its use in twentieth- and twenty-first-century marketing history research.

Under the pressure of such reductionism, the periodization process can often cause omission of important variables in the historical picture. Take, for example, Robert Keith's (1960) widely accepted history of "the marketing concept" wherein he deduces four eras in the evolution of the marketing orientation. An examination of introductory marketing textbooks that use Keith's production/sales/marketing/marketing-control orientation periodization (and most do) shows that a majority of them omit any mention of World War II and the postwar recovery period from their discussion of the supposed 1930–50 sales era (Hollander 1986). During that period from 1941 to 1946, 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.

Similarly, the history of marketing thought is filled with terra incognita discussions of managerial marketing that usually treat the area as having emerged in the 1950s with the appearance of the Howard (1957) and McCarthy (1960) books. Those books 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 earlier professors of marketing certainly thought they were training marketing managers. The marketing casebooks published by the Harvard Business School, beginning with Copeland's (1921) *Marketing Problems*, are certainly evidence of that reality. However, the reality is lost in the reductionism that accompanies Sheth, Gardner, and Garrett's (1988) description of a managerial school emerging in the 1950s, and Jones and Shaw's (2002) post-1957 "modern marketing management era."

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 (e.g., Bartels 1976; Sheth, Gardner, and Garrett 1988). 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 macrotopics 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.

In short, the periods we use to delimit our historical writing also limit it by omitting certain events. It is a necessary evil, so to speak, but one that should be more rigorously questioned.

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. For example, consider in Figure 2 the relatively short periods used by Converse (1959a) for marketing history as contrasted with the longer, sometimes centuries-long periods used by Hotchkiss (1938) or Fullerton (1988) in Figure 1. The development of large-scale retailing—institutional development during the late nineteenth and early twentieth centuries identified by Hotchkiss and by Fullerton—is nowhere apparent in Converse's periodization. That long-term trend is lost with the various shorter periods described by Converse.

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. Gerhard (1956), a specialist in European history, argues that history involves more continuity than change and, therefore, that periodization should be expressed primarily in terms of very long time spans. This makes sense for marketing history, but perhaps less so for the history of marketing thought as it has traditionally been studied since the discipline is only about one hundred years old. In that connection, note that the length of the periods in Figure 1 (all dealing with marketing or economic history) span centuries, while the periods illustrated in Figure 2 (including all of the marketing thought periodizations, even those that examine pre-twentieth-century marketing ideas) cover much smaller time frames.

Ultimately, it seems that the time span under study will have a strong impact on the duration of time periods identified. It is simply impractical for very long time spans, such as in Hotchkiss's (1938) study of more than 1,500 years of

evolution of market distribution, to be divided into short periods, regardless of the technique used. If nothing else, it would tax the memory of even the sharpest reader. Clearly, for subjects covering much shorter time in history, such as the marketing discipline, we can expect shorter periods to be used.

Consistency

We have mentioned previously the importance of context, complexity, and variation. Each of these can cause or require changes in focus over time (e.g., from marketing practices to government regulation of marketing to marketing thought). Nevertheless, to the extent that it is possible, it might be preferable to concentrate on the same dimension of marketing (e.g., marketing practices) throughout a periodization so that differences and similarities within that dimension can be identified over time. The problem is well illustrated in the work of Levett (1929) and to a lesser extent by Converse (1959a), who seems to assemble a jumble of different context issues and marketing practices that do not form a meaningful pattern. Hotchkiss's (1938) attempts to weave together the history of government regulation of marketing with the history of marketing practices, and the result is sometimes confusing. In other words, there is a trade-off between the context, complexity, and variation inherent in history on one hand and our need or desire to find pattern and consistency in history on the other.

False Sense of Progress

Since periodization is almost always done in retrospect, there seems to be 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-orientation to sales-orientation to marketing-orientation eras arriving in 1960 at what he called the emerging period of marketing control, all this in an increasing recognition of the importance of marketing. According to Keith, the marketing-oriented era had been preceded, first by a production era between 1870 and 1930 when businesses supposedly had to focus on production because of excessive demand for most consumer products. This was followed by a sales era beginning around 1930 when a collapse in consumer demand forced businesses to emphasize selling.

This periodization of production/sales/marketing/marketing-control eras was based on evidence from a single company (Pillsbury) for which its author was then executive vice president. Even the case for Pillsbury was based solely on Keith's personal recollections and ignored the fact that it was a conservative company (Hollander 1986). It also ignored the tremendous amount of consumer marketing that its leading and much more successful competitor, Washburn-Crosby (later

General Mills), had practiced for thirty or forty years. Surprisingly, Keith's periodization has become accepted wisdom in almost every principles textbook today. That status persists in spite of thorough and convincing historical scholarship that strongly contradicts it (Fullerton 1988; Hollander 1986; Witkowski 2002). But more to the point, one such text illustrates vividly the resulting false sense of progress by claiming that marketing did not exist prior to the marketing concept period beginning in 1960 (Solomon et al. 2003, 15).

Two more examples should suffice. In his article on the "Myth of the Production Era," Fullerton's (1988) periodization also describes progression and improvement from the origins to institutional development and, finally to the refinement and formalization of modern marketing. Also, in Jones and Monieson's (1990a) chronology of historical research in marketing, the field is viewed as progressing from the simple "recording the facts" to a more sophisticated "integration of practice and thought," then to "expanding its scope," and finally in the 1980s, "emerging as a discipline."

The history of marketing thought has fulfilled the prediction that periodization will tend to express its view of human progress. Overall, the literature sees marketing as moving from a crude state of intuitive action toward an increasingly informed and scientific discipline (Bobbitt 2002). One exception is Richard Pollay's (1985) "subsiding sizzle" study of print advertising in popular magazines that depicts a decline in selling orientation during the Second World War, a return to a product focus in the 1960s and 1970s, and a general decline in marketing orientation during the twentieth century.

CONCLUSIONS

Most marketing historians periodize their research and probably do so without giving much thought to the benefits, let alone the problems and limitations, of their periodization schemes. Periodization can summarize and structure historical research and, in that way, make the chronological narrative more understandable. However, as discussed here, periodization is subject to practical as well as methodological constraints. There are also choices available to historians when deciding on a periodization scheme. Hopefully, this article provides some guidance for making those choices.

Marketing historians who follow a more scientific approach to historical research, as advocated by Savitt (1980) and Golder (2000), or who use quantitative data, such as Pollay (1985) and Gross and Sheth (1989), will usually prefer the deductive or ex ante approach to periodization. However, most marketing historians are traditionalists in their methodology (Jones 1993) and, as mentioned above, will approach their periodizations inductively.

Above all else, periodization should mark important turning points in time. Therefore, we believe that the most appropriate technique for periodizing marketing history is to use turning points in the material itself being studied. Logically,

this also assumes an ex post or inductive approach to periodization. It makes no difference whether one's subject is marketing history, history of marketing thought, or as we have proffered above, the joint history of marketing practice and ideas. Turning points in the material itself should determine the choice of periods. Context-driven periodization can also be appropriate when relevant, and significant changes in context can be clearly identified, as in changes in the presidency and Congress when studying the history of the relationship between marketing and government. In such a case, context becomes almost indistinguishable from the subject or material of primary interest. With the exception of our grudging admissions to human nature and avenue of last resort, it is obvious from the discussion above that we do not recommend periodization by fixed time intervals such as decades or centuries.

Regardless of the technique used, there are trade-offs and limitations that should be kept in mind as choices are being made. Reductionism is the result of the unavoidable trade-off between the need to simplify history to make it more understandable and the inherent complexity of history. In that way, reductionism is related to the choice of period duration. Periods of shorter duration will induce greater volatility and variability in the data, yet the essence of periodization is to divide up the expanse of time into understandable chunks. Thus, with both reductionism and duration there are choices that must be made by the historian, and those choices should be made with the inherent trade-offs clearly in mind. Consistency refers to the desirability of maintaining focus on the same dimension(s) of marketing across time periods to facilitate comparison of the similarities and differences across time. Finally, marketing historians should be wary of overstating the sense of progress that often accompanies periodization.

As we look at all the periodization that has been done so far, it appears that there is probably more to do. Has 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.

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