



# Historical methodology: the perspective of a professionally trained historian turned marketer

Ronald A. Fullerton  
*Toms River, New Jersey, USA*

## Abstract

**Purpose** – The paper's aim is to explain historical methodology in a marketing context.

**Design/methodology/approach** – The paper draws on the author's personal experience, being trained in the history method and using the historical method.

**Findings** – An awareness of time contexts and complex change is essential, so too is an appreciation of primary sources (as defined by historians). Reading the present into the past (anachronism) is to be avoided, and the interpretation and explanation of events are essential to good history.

**Originality/value** – The paper represents the author's own personal experience.

**Keywords** Historical method in marketing, Time and change, Primary vs secondary sources, Anachronism, Interpretation, Critical analysis, Economic history, Marketing

**Paper type** Viewpoint

I am writing this in the hope that it will help marketing historians, as well as those with the desire to become marketing historians, to see how the researching and writing of history is done. I received 14 years training in history, at some of the best schools in the United States. Of course I received training in historical methodology, a great deal of it, but, as we shall see, methodology is approached much differently by an historian than it is by a marketer.

## Personal background: studying history

I spent four years (1961-1965) at Rutgers University, which then as now had an excellent History department. Fortunately for us honors undergraduates, Rutgers had only a small doctoral program so we received much of the attention from the department's faculty. From the second semester of my freshman year I was in small honors seminars in history, all of them taught by the most senior faculty. My sophomore year I received British-style tutorials (one or two students reading their papers to a faculty member) given by one of the members of the History Department. From Rutgers I went on to Harvard and the University of Wisconsin, both of whose graduate programs in history were ranked in the top five US schools for most of the twentieth century. At Wisconsin I wrote a doctoral dissertation on the nineteenth century German book markets under Dr Theodore Hamerow, who was one of the country's leading historians of Germany. In the late 1970s I published two lead articles in the highly regarded *Journal of Social History* (Fullerton, 1977, 1979).

So I had a very good and very thorough education in history. How much of it dealt with methodology? If by methodology one means what a marketer means – a thorough discussion of why and how every step was undertaken, with copious references (e.g. It is advocated by Ackerman *et al.* (1998), Quatsch *et al.* 2002, and Blodsinn and



---

Windbeutel (2004) that primary sources are optimal for dealing with this type of problem, etc) – then the answer is that practically none of my education in history dealt with methodology. The trained historian would use primary sources without any justification or explanation whatsoever. In fact, only one professor, in the Rutgers undergraduate program, assigned anything explicitly dealing with methodology, perhaps because the class had non-majors in it. It was Louis Gottschalk's ancient text. But I quickly stopped using it as it was simplistic and never in the rest of my studies in history referenced either it or any other works on methodology. I was never criticized.

### **Methodology should be used, but seldom discussed**

I learned from my teachers that methodology should be used, but seldom explicitly discussed. There was a brief period in the mid-1960s when many articles on historical methodology appeared in the journals but my teachers never discussed them. What they did discuss was the need for good writing. In history there is a tremendous emphasis on clear, interesting, and smooth writing, on excellent transitions (none of the Marketing habit of labeling separate sections). Where marketers use references in the text, historians use footnotes, which are conventionally put at the end. It makes for smoother writing. Some of the writing was memorable; I think of R.R. Palmer's (1950) *A History of the Modern World* (1st ed.), a history of Europe since 1517, of James M. McPherson's, 1989 *Battle Cry of Freedom*, a history of the American Civil War years, of G.M. Young's (1964) impressionistic masterpiece *Victorian England: Portrait of an Age*. Unfortunately, I cannot think of a single memorable sentence or paragraph in the 30 years I have spent reading marketing books and journals.

Interestingly, in calling for good writing the historians made no mention of narrative. It could be used but was not essential. In fact, most of the writing I did was thematic rather than narrative. The emphasis on narrative came much later, well after I had completed my studies. It is one way to write some history, but hardly suitable for all topics.

In studying history I learned by listening, by taking comments written on my papers seriously. Above all, I learned by doing historical research. From my sophomore year on I was conducting serious historical research, using the rules and guidelines that were laid down obliquely by my teachers. If I did not use appropriate methodology I was told so, but usually I could intuit what appropriate methodology was by reading what I had been told was good historical research. One of my sophomore assignments, for example, was to take an article that had been published in a reputable journal and analyze it thoroughly: check all footnotes (historians used to love long fact-filled footnotes) for accuracy, test if the author had considered enough perspectives, search out "anachronisms," i.e. attempts to read the present into the past, estimate how much sense the author's interpretations made in light of the presented evidence, etc.

### **Using primary sources**

So what was the methodology that I was taught? One guideline was to use primary sources – sources created during the period under discussion – as much as possible. To a historian, primary sources are anything created during the period being studied – original documents, analyses, stories, ephemera, physical materials (the stuff of material culture). I have used most kinds of primary sources. One graduate course featured a paper written entirely by studying microfilms of handwritten early

nineteenth century municipal records from a small German town; my topic was the Poor Board. For my dissertation I used trade newspapers, contemporary books themselves, book-length contemporary studies, and ephemera. I also used secondary sources, but always as a way to frame contemporary evidence.

Why is it so important to use primary sources? Because the historian has to get into the minds of contemporaries, has to see the world as they did. There is no better way to do this than by reading what they wrote, or seeing what they created. A famous historian once said: “Read, read, read, until you can hear them speak.” In other words the historian should become so familiar with contemporary sources that s/he can begin to hear them speak, and to really understand what they were saying. Secondary sources – created after the fact – should be used, but always more sparingly. They were not created by contemporaries and do not reflect contemporary thinking. Some of them commit the sin of “anachronism,” reading the present into the past. Some of what passes as marketing history today is really nothing but anachronism – interesting, but not history.

As many as possible primary sources had to be read, to provide triangulation as well as multiple perspectives. After all, contemporaries do not necessarily agree. It is difficult, but essential, that the historian has to piece together a story from disparate sources. The interpretive story should incorporate as much of the evidence as possible.

In researching the German book markets for my doctoral dissertation (Fullerton, 1975), for example, I read hundreds of firm histories, published book-length descriptions of the book trade, histories of the book trade, almost eighty years of weekly book trade newspapers, ephemera that had been collected over the years by the Exchange Union of German Booksellers, histories of education, economic histories, studies of legacies, and studies of reading over time. In doing my 1988 *Journal of Marketing* article (Fullerton, 1988) I read literally hundreds of firm histories, old textbooks (Converse’s was especially useful), contemporary books and other reports. People tell me that there are so many references in the article; they do not realize that I eliminated many in the revision at the suggestion of a reviewer concerned for clear writing. Had I not followed his/her suggestion I might have had eight to ten references in each parenthesis, but following his/her suggestion I had at most three.

I have used interviewing in a few pieces concerning Paul F. Lazarsfeld. As one of those interviewed said, “this happened a long, long, time ago” but the testimony of contemporaries who knew and worked with Lazarsfeld is certainly valuable. The testimony of the people interviewed for the Lazarsfeld studies seemed highly plausible, hence I used it.

A second example of employing primary sources comes from my recent (Fullerton, 2005, 2011) work on Motivation Research (MR). Skeptical of current textbook pronouncements that MR consisted of little more than Ernest Dichter’s colorful and titillating psychoanalytic pronouncements (e.g. Kotler, 2003; Solomon, 2002), or even of Tadjewski’s (2006) much more reasoned but still Dichter-focused article treating it exclusively as qualitative research, I began to explore the full range of what contemporaries in the 1940s and 1950s considered to be Motivation Research.

The most common contemporary definition was that MR drew upon anthropology and sociology as well as on the various schools of clinical psychology (Schrier and Wood, 1948; Gardner, 1959). There was plentiful documentation that this was true (e.g. Martineau, 1957, Newman, 1957). Martineau, who drew heavily upon the work

---

being done at the University of Chicago, goes on at length about the important role of social class and of culture; Newman cites a MR study which used standard quantitative survey methodology then interpreted the results in terms of respondents' social class. So MR was far, far more than Ernest Dichter's pronouncements grounded in depth psychologies. Although it made heavy use of qualitative research, MR actually used quantitative research as well. Herta Herzog, one of the pioneers of and a major user of MR, always used standard quantitative survey methodology to develop the insights she had garnered from qualitative research. Dichter, whose methodological range was narrow, and exclusively qualitative, was but one of at least a dozen major Motivation researchers – but he had the biggest mouth and made the most outrageous pronouncements, so he got a disproportionate share of the attention. Far from dying out when the public grew tired of Dichter, MR actually laid the foundations for today's discipline of Consumer Behavior.

### **Understanding the past on its own terms**

Another methodological guideline was that the past has to be understood on its own terms. The contexts of events are crucial. It is all too easy to read our present day concerns into it, but that would be to weaken it as history. The past saw things differently, sometimes very differently. In much of Europe three centuries ago children were seen as little adults, childhood as we know it did not really exist; neither did adolescence. It is irrelevant whether we agree or disagree with past thought and practice. Anachronism is really a sin to historians.

Let me give some examples of differences between past and present. "Rubber goods" is to present day eyes a harmless descriptor of hot water bottles, rubbers to keep feet dry, etc. But to nineteenth century Germans "rubber goods" (*Gummiwaren*) were exciting and very obscene things lightly disguised under a seemingly innocuous name. Any adolescent or adult knew what was being advertised or discussed when seeing the term "rubber goods". How do I know this? By reading many nineteenth century advertisements and contemporary works of moral criticism that denounced "rubber goods". Another example is what seems like the extreme class consciousness of nineteenth century Germans or Britons. The historian understands that to people at that time class was very important and class awareness was always present. People took great pride in being members of the working class, or they strove to employ at least one servant – the criterion for belonging to the middle class. Again, when G.M. Young classically defined Victorian England he noted that only two phenomena were never criticized – representative institutions and the family (Young, 1964). Family would not be so important in today's England, and representative institutions today are distrusted by many Britons as corrupt.

### **Reading critically**

When reading primary sources it was important to read them critically since much writing – whenever it is done and by whomever it is done – is self-serving and distorted, or incomplete, or it advocates a definite point of view. By reading critically, I mean challenging the authors' viewpoints, trying to determine what viewpoint they held and why, and assessing just how believable their explanations are. One should expect differences, but one has to try to reconcile them – or accept them as presenting a complex contradiction-filled reality – or completely discard one or another. A distorted

viewpoint can still be usable as long as the historian knows that it is distorted. As an undergraduate, for example, my seminars grappled with Charles R. Beard's, 1913 *An Economic History of the Constitution of the United States*, which argued that the United States founding fathers were acting mainly out of economic self-interest in framing the Constitution. Beard's was a radical view; the founding fathers are more conventionally seen as great and disinterested statesmen. Beard's thesis, however, had to be taken seriously – it was well documented and remains influential to this day. Yet one should not accept Beard's views as the whole truth since he was intentionally advocating a specific point of view. Taking the conventional view, and Beard's view, into account gives a more balanced but also more complex picture: the founding fathers were great statesmen but definitely influenced by their own class and self-interest.

Dealing with differing points of view is one of the hardest tasks an historian faces. Sometimes they can be reconciled – but often choices have to be made. In researching the German book markets I read the weekly book trade newspapers. Especially in the 1820s, they were full of complaints from traditional booksellers threatened by aggressive entrepreneurial competition. These booksellers commonly longed for “the good old days”. I did not take the complaints as the literal truth, but rather as expressions of pain. I quickly learned that part of the publishing industry was made up of some of the real pioneers of modern, aggressive, marketing – marketing that attempts to expand demand. But of course the publishing industry also had its conservatives who were not aggressive, disdaining the aggressive selling of books. There were in essence two different book markets. Then I began to realize that there was a third book market, completely separate from the other two, its existence ignored by the other two. It was the market serving the rural and urban lower classes; it sold different materials – sensationalistic news broadsheets and devotional manuals early in the century, supplemented by trashy pamphlet fiction later in the century. It sold these materials, not through bookstores, but through itinerant vendors (colporteurs) and, later in the century, through street kiosks.

### **Interpretation – the key to good history**

The most important part of the historical methodology, which I learnt was the mandate to interpret, to explain. A mere presentation of the factual material was disdained as chronicling, more useful for millennia-distant periods of history where factual evidence is scarce, but not for the nineteenth or twentieth centuries, where plentiful factually accurate source material exists. On the smaller historical issues – the topics for much doctoral and academic research – there is generally plentiful material for the nineteenth and twentieth centuries, but there may be gaps in the knowledge presented. Or there may be conflicting sources. It is the job of the historian to fill in the gaps as best s/he can, and chose between conflicting sources.

On the big historical issues no one disagrees over factual matters. There is no doubt, for example, that Napoleon was badly defeated at the Battle of Waterloo in 1815, or that Western Europe had several violent revolutions in 1848, or that the United States had an horrific civil war from 1861 to 1865. The key to interpretation is explanation. Why was Napoleon defeated in 1815 – the genius of his enemies, especially the Prussian general Blucher or the British commander Wellington; the fact that Napoleon had purged too many of his best generals before 1815; pure happenstance (Wellington later said that the battle “was the closest run thing you ever saw”); the fact that

---

Napoleon was just having a bad day (he had slept poorly the night before the battle); etc. It is the task of the historian to explain.

The explanation is to be as objective as humanly possible. One is not to take sides. However, it is expected that different historians, presented with the same set of facts, may explain them differently. One believes one or another version according to one's own views on historical causation, e.g. do great men have great influence or are they under the almost total control of larger economic, technological, etc forces; e.g. do people make moral choices or are they primarily motivated by economic self-interest? Were the Russians continuing their centuries old drive to expand after the Second World War, or did they genuinely feel threatened, especially after the German advances and atrocities during the war? I was generally taught a middle of the road stance on causation, but was well aware that there were extremes.

One of my undergraduate assignments was to examine three biographies of the late eighteenth early nineteenth century French statesman Talleyrand (1754-1838). All relied on the same set of facts; the factual background of Talleyrand has been exhaustively researched. All reached different conclusions – all explained and interpreted the same facts differently. I acknowledged that all three biographers stuck to the known facts, but also that they interpreted them differently: he was the architect of a century of European peace; he was an unprincipled scoundrel; and so forth. It may seem frustrating that there is not one overwhelmingly true perspective, but historical reality is often complex and full of contradictions.

Sometimes it hurt to learn to interpret better. One of my Harvard teachers wrote on a paper: “too many *va sans dire* [it goes without saying] generalities”. I would rather have been praised, but I took the comment to heart and probed more deeply in interpreting. I was pushed even harder by my most maddening teacher, the patrician H. Stuart Hughes at Harvard. He advocated “turning this around” – reversing the explanation in one's mind to get a new perspective. The request frustrated me at first, but I eventually realized that taking the opposite perspective was a marvelous way of testing the strength of one's own interpretation. It opened one's mind to new possibilities, which could of course be discarded, but only after careful analysis. In a recent paper for example I deal with the fact that sophisticated marketing practice existed long before any marketing thought. I then asked why and how did marketing thought develop when practitioners were doing so well without it for so long. Of what use was it? The answer came partly from seeing that there was a hunger on some business people's part to learn without having to have years of experience; and partly from seeing that as universities expanded in the nineteenth century, especially in Germany, so too did academic disciplines expand, for example sociology or psychology. The universities needed materials with which to teach and write about, they needed practical examples from everyday life. Marketing phenomena provided fine examples, the more so as a formal discipline of marketing was developing. The discipline of marketing would teach people who in many cases would otherwise figure out stratagems on their own.

### **How an historian interprets**

A few examples from my work will illustrate how an historian interprets. My doctoral dissertation on the German book markets in the nineteenth century will provide the first example. All of the German book markets grew tremendously, which I first

attributed to the expansion of literacy and moderately increasing affluence. But many articles in the trade papers said that because people could read did not necessarily mean that they would buy books or other reading material. There was only so much money, and many things on which it could be spent. The expansion of literacy came from state education, which was expanded mainly to provide a workforce that could read work directions, pious tracts, and little else. I soon realized from complaining articles in the trade papers that there was a tremendous competition for people's money: from private schools, from taverns, from resorts, from clothing and furniture makers, etc. So the fact that more people could read did not necessarily mean that more people would buy books.

Then I looked to the tremendous technological advances that were made in printing technology during the century. The first really rapid printing press was invented by a German, as were many of the advances in printing technology throughout the nineteenth century. Yet German publishers were slow to buy the first rapid press; it was sold to the *Times* of London. Why buy a high-speed press to print only a few books?

So expanded literacy and improved printing technology could not, by themselves, explain the growth of the German book markets. I then turned to a fascinating discussion of reading habits from the seventeenth through nineteenth centuries (Engelsing, 1969), which discovered that where earlier readers read intensively, reading the same books repeatedly – people who had read the complete Bible over 50 times were common – over time the tendency became to read extensively – to read many titles once. But who was presenting readers with so many titles? Who was encouraging people to read many different books? I found the catalytic force in the aggressive marketing efforts of some publishers: they commissioned the writing of books that they sensed would sell well (e.g. cookbooks, how-to manuals, encyclopedias, profusely illustrated books), they introduced markedly cheaper (and usually pirated) editions of the classics, and they invented newer and cheaper ways of retailing books. Aggressive marketing utilized the advantages provided by the expansion of literacy and of printing technology; yet without these advantages publishers would not have succeeded to the extent that they did. Of course, nineteenth century German publishers and booksellers never used the word “marketing” (*Absatzwirtschaft*); they talked of “markets” characterized by “a disquiet, an urgency, a bustle, an aggressiveness” (Perthes, 1834).

A second example of historical interpretation comes from my articles on kleptomania during the past seven years (Fullerton and Punj, 2004; Fullerton, 2007). I started examining kleptomania as part of a stream of research on present-day consumer misbehavior that I was doing with Professor Girish Punj. It was one of many forms of misbehavior. Never being able to get away entirely from history, I wondered how far back the literature on kleptomania extended; I knew that descriptions of shoplifting go back centuries. I traced back the definitions of kleptomania to 1815, to the work of a Swiss doctor. I found very little difference between his descriptions of the phenomena and later descriptions down to the present, almost 200 years later.

But the explanations for why kleptomania occurred – those had changed drastically over the years, reflecting whatever the currently fashionable schools of psychology were saying. Thus in the first half of the nineteenth century, following the then-dominant French thinkers, kleptomania was ascribed to a “lesion of the will” – a gap in the will to behave that allowed the misbehavior to break through. When

---

criminal defense lawyers began utilizing “lesions of the will” to justify their temporary insanity defenses, however, influential British thinkers announced that kleptomania was not an uncontrollable force, but rather a humbug, an attempt by perfectly rational people to get away with crimes.

Around the turn of the twentieth century French psychologists popularized the notion of “department store kleptomania,” in which the blame was placed on the stores’ enticing displays, which were said to completely unhinge many women from their moral inhibitions.

That explanation in turn was replaced by Freudian interpretations, which influenced theorists and retail practitioners alike for over half a century. Early Freudian theorists, e.g. Wilhelm Stekel, stressed that the stolen objects had strong sexual significance, a candle being a phallic symbol, an umbrella (it is long and narrow and when unfolded it expands) another phallic symbol, a glove a receptacle into which something is inserted and therefore a vaginal symbol. A woman stealing a cake of soap might be symbolically stealing her father’s penis (Bonaparte, 1929). Later Freudians grew more sophisticated in their thinking but also less accessible. Both early and late psychoanalysts agreed, however, that there was a profound connection between theft and orgasm in the kleptomaniac. Another popular depth psychology in the first half of the twentieth century was Dr Alfred Adler’s inferiority complex, which explained that a person could steal compulsively to compensate for feelings of inferiority. Freudian explanations died almost completely out after about 1960 in the United States but remain influential in Quebec province, South America, Russia, and France. Current US thinking on kleptomania emphasizes short-term action-oriented therapy to train people not to steal compulsively; current thinking also emphasizes pharmaceuticals to restore the chemical balance in the brain. Following my review of explanations over time, I am convinced that something else will eventually come along as explanation.

### **Interpretation 2: doing history**

When exploring a topic the serious historian is often confronted by a great deal of information, which points in many directions. Merely to recount these discrete bits of information would not be properly doing history. The challenge is to piece together a coherent story that describes and also explains what went on. Sometimes there is an existing story, developed by other historians; sometimes there is no story. In both cases one has to make a leap of imagination in order to explain. The explanatory story line should incorporate as much of the evidence as possible; the logic here is analogous to regression.

Take the example of periodization, one of the major tasks of the historian. When I first read Bartels’ (1976) *History of Marketing Thought* I was appalled to see him using calendar decades for periodization, when actually periods should be held together by the major events that occur during them, not arbitrary division such as the 1920s, the 1930s, and so forth. Thus historians conventionally date the nineteenth century from 1815, when the convulsive Napoleonic wars ended, to 1914, when World War One broke out; the period in between was characterized by a long peace on European soil. True, there were revolutions and attempts to put them down, as in 1848. There were the wars to unite Italy and Germany. There was the Crimean War between England, France and Russia. But these conflicts were minor compared to the wars, which preceded and followed them. To replace the production era sales era marketing era



scheme, which I had shown to be unfounded in my 1988 article (Fullerton, 1988), I developed another periodization scheme going back a few centuries.

When I approached the German book market in the nineteenth century I wanted to find temporal groupings, separate time periods which were different enough from each other to merit being separate; each time period had to be held together by a theme, as for example the years 1815 to 1830 being held together because the tenor of the trade was still slowed by inertia, by strong adherence to tradition. After 1830 there was a quickening of pace in the trade, with more and more aggressive entrepreneurs entering the trade. This does not mean that everything was tradition-bound before 1830 or that every bookman after 1830 was an aggressive entrepreneur – but the evidence strongly pointed in that direction. The aggressive bookmen set the tone. Had there been no such evidence, or merely a little information, I would have had to seek another periodization scheme. Aside from the periodization schemes I also found that materials sold to the rural masses, late joined by urban masses, were quite different from those sold to middle and upper-class Germans. There were different publishers. Moreover, the materials were sold, not in bookshops or other urban venues, but by wandering peddlers. I thus concluded that this was a separate book trade – that was the unifying story and explanation. Nearly all of the evidence fit it.

### **What if there is little or no change?**

We have been talking mainly about the nineteenth and twentieth centuries, which are universally acknowledged to have been characterized by rapid and major changes in much of the world. But the change did not occur at the same rate, or to the same degree. Even in the United States and Western Europe there were slow-changing communities. I have noticed in my travels that emigrant communities, e.g. Germans in Namibia or South America or Indians in Fiji, retain much of what has long since died out in the mother country. Countries can change – Japan was so conservative a few hundred years ago that fashion in clothing could last one thousand years. Whatever happens with regard to change, however, the historian has to be acutely aware of it.

### **Selecting topics**

I normally find historical topics by association or by suggestion. A professor at Harvard suggested that studying the book trade would offer insights into intellectual history, but doubted that there was much material available. Looking, I found plentiful material. Reading the German-Austrian journal *Werbeforschung und Praxis* one day in the late 1980s, I came across an article detailing the archive devoted to Paul F. Lazarsfeld at the University of Vienna. I suddenly remembered having read an article by Hal Kassarian, which said that Lazarsfeld had played a big role in the early development of Consumer Behavior. Intrigued, I got a grant to travel to Vienna to do research in the archive, which led to at least four publications (Fullerton, 1990, 1999, 2005, 2009). When reading about the German controversy about advertising in the early twentieth century, I kept running across references to an 1859 book on advertising by one Karl Knies. It was hard to track down a copy of the book in the United States – even Harvard did not have it – but eventually I did, finding that it offered a remarkably prescient theoretical discussion of advertising, which I then wrote about (Fullerton, 1998). When taking a seminar on intellectual history as an undergraduate I began thinking about the psychology course I was taking at the same

---

time. Were there historical materials on psychology? I found that there were, for each of the disparate schools of psychology. I wrote on the nineteenth century development of American experimental psychology.

Sometimes a topic comes purely by luck. When rooting around in the library of a professor in Vienna, I found, on the top shelf, a book on American marketing in the 1930s by H.F.J. Kropff, an Austrian scholar some of whose work I was familiar with. The book proved to be a remarkably thorough treatment on American marketing institutions, both academic and commercial, during the 1930s. Kropff knew the US very well and wanted to explain to Germans and Austrians what progress the Americans had made. So I wrote about the Kropff work (Fullerton, 1994).

### **Possible exceptions**

I was trained in mainstream history. There were two other schools of historical thought at the time, which did use explicit methodological arguments – quantitative history and psychohistory. Psychohistory attempted to use Freudian psychoanalysis to understand past figures. Quantitative history gathered numerical data and analyzed it using statistical methods. Both schools were far enough from the mainstream that their methods would require explicit justification if they were to be taken seriously by historians.

Quantitative techniques are foreign to most historians. They might argue that there are too many variables for analysis, but the fact is that most of them simply do not know and are uncomfortable dealing with quantitative methods. And yet some subjects lend themselves to numerical analysis, especially subjects from the nineteenth and twentieth centuries, where there are complete or near complete data to analyze. I often regret not learning and using more sophisticated statistics for my doctoral dissertation; there was plentiful material, which I did put into tables, but it would have been interesting – and possibly even valuable – to perform statistical analysis. Of course the work could not have been entirely statistical.

A famous example of quantitative history is Robert Fogel and Stanley Engerman's, 1974 *Time on the Cross*, a study of the economics of American slavery. Studying plantation records in detail and analyzing the results statistically, the authors demonstrated that slave labor was more productive than free labor and thus was not likely to die out on its own. It was more productive, Fogel and Engerman demonstrated, because slaveholders fed their slaves well and housed them adequately. These findings were simply anathema to politically correct historians. And yet they made sense if one considers that the slaveholders, whatever their essential human decency, would want to provide good nutrition to their slaves, who were costly to replace and who did the bulk of the work. What the book did not deal with, on the other hand, was the less quantifiable but nonetheless real dehumanization that slavery entailed. So it alone is not a complete picture of American slavery, but it made a valuable contribution. This makes a general point: that the field of history is enriched by differing points of view.

### **Why did I choose marketing after studying history?**

By the time I completed my PhD, the market for university historians had been nearly dead for several years; in fact, my advisor had asked us to slow down in the hope that there would be an upturn in the market. But one never came. So what to do then? I enrolled in the MBA program at Cornell, wrestled with what subject to concentrate in,

considered accounting, information systems, and marketing, and finally decided upon marketing. Once I had taken some marketing classes I realized how much my dissertation had examined it – and that I had an excellent intuitive sense for the subject. Having taken marketing courses I could use the terminology of contemporary marketing, yet even with my new knowledge I would not have investigated any more phenomena.

---

### **Historical methodology versus social science methodology**

History is generally classified as partly a social science and partly a member of the humanities. It is a social science in that its findings are grounded in factual evidence. Where it differs from other social sciences is in its awareness of change over time. This is contrasted with the widespread social science assumption of changelessness, for example when an economic study of the nineteenth century uses the same techniques as the study of the twentieth century and assumes that all variables being examined are exactly the same in both centuries; or a sociological study simply assumes that what applies to one period also applies to another. Since most marketers have been trained in social science methodologies without being exposed to humanistic methodologies, marketing history is a real challenge for them. Doing marketing history requires a mind opening, allowing awareness of change over time to take a large role. By awareness of change over time I am not expressing the attitude, common in marketing, that a literature search has to go back no further than five years because it is assumed that anything done before then is hopelessly naive and useless, done by doddering and ignorant old timers. Actually I have noticed that many of the marketing textbooks written in the 1940s and 1950s are better written than more recent ones.

### **Summing up**

So what have we learned? I can sum up under four strictures.

- (1) An awareness of time and complex change is essential. Change is a fundamental but does not always occur at the same rate.
- (2) An appreciation of primary sources – as defined by historians – is essential. Whatever was created during a specific time is a primary source for historians.
- (3) We must understand the past on its own terms – seeing it as contemporaries did; reading the present into the past – anachronism – is to be totally avoided. We have to comprehend the context(s) in which events occurred.
- (4) Interpreting and explaining events are essential to good history; it is not enough merely to recount events.

For most marketers the most difficult to follow are probably the first and third, but the other two may also pose challenges. But then I have had to learn Marketing methodologies to work for the past 30 years. Challenges can be met.

### **References**

- Bartels, R. (1976), *History of Marketing Thought*, Grid, Columbus, OH, (originally published in 1962).
- Beard, C.R. (1913), *An Economic History of the Constitution of the United States*, Macmillan, New York, NY.

- Bonaparte, M. (1929), "Un petit acces de Kleptomanie larvee", *Revue Francaise de Psychoanalyse*, Vol. 3, pp. 478-81.
- Engelsing, R. (1969), "Die Perioden der Lesergeschichte in der Neuzeit", *Archiv fuer Geschichte des Buchwesens*, Vol. X, Frankfurt am Main.
- Fogel, R. and Engerman, S. (1974), *Time on the Cross: the Economics of American Negro Slavery*, Little, Brown, Boston, MA.
- Fullerton, R.A. (1975), "The development of the German book markets, 1815-1888", unpublished PhD dissertation, University of Wisconsin – Madison, Madison, WI.
- Fullerton, R.A. (1977), "Creating a mass book market in Germany", *Journal of Social History*, Vol. 10 No. 3, pp. 265-83.
- Fullerton, R.A. (1979), "Towards a commercial popular culture in Germany", *Journal of Social History*, Vol. 12 No. 4, pp. 489-511.
- Fullerton, R.A. (1988), "How modern is 'modern' marketing? Marketing's evolution and the myth of the 'production era'", *Journal of Marketing*, Vol. 52 No. 1, pp. 108-25.
- Fullerton, R.A. (1994), "And how does it look in America? H.J.F. Kropff's historic report on US marketing", *Journal of Macromarketing*, Vol. 14 No. 1, pp. 54-61.
- Fullerton, R.A. (1998), "A prophet of modern advertising: Germany's Karl Knies", *Journal of Advertising*, Vol. 27 No. 1, pp. 51-66.
- Fullerton, R.A. (1999), "An historic analysis of advertising's role in consumer decision-making: Paul F. Lazarsfeld's European research", in Arnould, E. and Price, L. (Eds), *Advances in Consumer Research*, Vol. 26.
- Fullerton, R.A. (1990), "The art of marketing research: Paul F. Lazarsfeld", *Journal of the Academy of Marketing Science (JAMS)*, Vol. 18 No. 4, pp. 319-28.
- Fullerton, R.A. (2007), "Psychoanalyzing Kleptomania", *Marketing Theory*, Vol. 7 No. 4, pp. 335-52.
- Fullerton, R.A. and Punj, G. (2004), "Repercussions of promoting an ideology of consumption: consumer misbehavior", *Journal of Business Research*, Vol. 57 No. 11, pp. 1239-49.
- Fullerton, R.A. (2005), "The devil's lure (?): motivation research, 1934-1954", in Neilson, L.C. (Ed.), *The Future of Marketing's Past: Proceedings of the 12th Conference on Historical Analysis and Research in Marketing*, Association for Historical Research in Marketing, Long Beach CA, pp. 134-43.
- Fullerton, R.A. (2009), "When the owl of Minerva flew at dusk: German and Austrian marketing thought between the world wars", *European Business Review*, Vol. 21 No. 1, pp. 92-103.
- Fullerton, R.A. (2011), "The birth of consumer behavior: motivation research in the 1950s", in Neilson, L.C. (Ed.), *Marketing History in the New World, Proceedings of the 15th Biennial Conference on Historical Analysis and Research in Marketing, CHARM, New York, NY*, pp. 61-8.
- Gardner, B.B. (1959), "The ABC of motivation research", *Business Topics*, Vol. 7, pp. 35-41.
- Kotler, P. (2003), *Marketing Management*, 11th ed., Pearson Educational, Upper Saddle River, NJ.
- Martineau, P. (1957), *Motivation in Advertising*, McGraw Hill, New York, NY, Toronto, and London.
- McPherson, J. (1989), *Battle Cry of Freedom: the Civil War Era*, Oxford University Press, New York, NY.
- Newman, J.W. (1957), *Motivation Research and Marketing Management*, Harvard University Press, Boston, MA.
- Palmer, R.R. (1950), *A History of the Modern World*, 1st ed., Knopf, New York, NY.

- Perthes, F. (1834), "Die Bedeutung des deutschen Buchhandels, besonders in der neuesten Zeit", *Boersenblatt fuer den deutschen Buchhandel, und fuer die mit ihm verwandeten Geschaeftszweige*, No. 1, p. 6.
- Schreier, F.T. and Wood, A.J. (1948), "Motivation analysis in market research", *The Journal of Marketing*, Vol. 13 No. 2, pp. 172-82.
- Solomon, M. (2002), *Consumer Behavior*, 5th ed., Prentice-Hall, Upper Saddle River, NJ.
- Tadajewski, M. (2006), "Remembering motivation research", *Marketing Theory*, Vol. 6, pp. 429-66.
- Young, G.M. (1964), *Victorian England: Portrait of an Age*, Oxford University Press, New York, NY, (originally published in 1936).

#### **About the author**

Ronald A. Fullerton was originally trained in history but has spent the last 30 years as a Marketer, with publications in several of the most highly regarded marketing journals. For the past 16 years he has taught internationally, including Egypt, the Fiji Islands, Morocco, Kazakhstan, and Botswana. He has recently retired from full-time teaching but continues publishing. Ronald A. Fullerton can be contacted at: [fullertonprofron@yahoo.com](mailto:fullertonprofron@yahoo.com)