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articles

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Abstract. *Marketing has been practiced since ancient times and has been thought about almost as long. Yet, it is only during the 20th century that marketing ideas evolved into an academic discipline in its own right. Most concepts, issues and problems of marketing thought have coalesced into one of several schools or approaches to understanding marketing. In this article we trace the evolution of 10 schools of marketing thought. At the turn of the 20th century, early in the discipline's history, the study of functions, commodities, and institutions emerged as complementary modes of thinking about subject matter and became known collectively as the 'traditional approaches' to studying marketing; shortly thereafter the interregional trade approach emerged. About mid-century, there was a 'paradigm shift' in marketing thought eclipsing the traditional approaches as a number of newer schools developed: marketing management, marketing systems, consumer behavior, macromarketing, exchange, and marketing history. During the mid 1970s, three of the modern schools – marketing management, consumer behavior, and exchange – underwent a 'paradigm broadening'. The broadened paradigm has bifurcated marketing thought from the conventional domain of business behavior to the much broader domain of all human social behavior. Thus, at the beginning of the 21st century marketing thought is at a crossroads.* ***Key Words*** ● *marketing history* ● *marketing theory* ● *marketing thought*

Introduction

In the study of any academic discipline, ideas and issues are discussed and debated. Over the course of time these concepts and arguments cluster into critical masses that may be described as a means of organizing subject matter, an approach to understanding the discipline, or as a school of marketing thought.

Several articles already exist reviewing the history of individual schools of marketing thought, particularly Hollander (1980) on the institutional school; Hunt and Goolsby (1988) on functions; Murphy and Enis (1986) and Zinn and Johnson (1990) on the commodity school; Savitt (1981) on interregional trade; Sheth and Gross (1988) on the consumer behavior school; Webster (1992) on marketing management; and Wilkie and Moore (2002, 2003) on twin areas of macromarketing: marketing and society, and marketing and public policy. In addition, there are published reviews on some of the sub-areas of schools, such as Fisk et al. (1993) on Services Marketing; and Berry (1995) on Relationship Marketing. Finally, there are also two excellent books on the subject of schools of marketing thought and theory: Bartels' (1988) *The History of Marketing Thought* and Sheth et al.'s (1988) *Marketing Theory: Evolution and Evaluation.* Why yet another history?

Unfortunately, the review articles focus on the history of individual schools, or a sub-area within a school, and miss the wider landscape of their fit with other schools and the whole of marketing thought. Also, despite their seminal contributions to the marketing literature, there are some limitations in each of the books. Bartels' (1988) work primarily focuses on sub-areas of marketing, rather than schools of thought. Although traditional schools are discussed in his general marketing section, and there is a chapter on marketing management and one on 'newer areas', the book is a general history of marketing as an academic discipline, organized chronologically, rather than a focus on schools of marketing thought. Sheth et al. (1988) provide the most comprehensive work on schools of marketing thought. Their book mainly centers on the theoretical evaluation of these schools, however, rather than their historical evolution.

The purpose of this work is to bring the history of schools of marketing thought up to date. We provide new insights into the origins and development of the traditional schools. We discuss the paradigm shift resulting in an array of newer schools during the mid 1950s, and the subsequent paradigm broadening of the most popular schools of marketing thought in the mid 1970s. Based on this historical analysis, the article examines the state of marketing thought at the beginning of the 21st century, describes how the schools are interrelated with one another, explains the crossroads at which the discipline currently finds itself and proposes a path for the future.

Because of its panoramic scope in discussing 12 schools of marketing theory, the pioneering work of Sheth et al. (1988) provides a useful starting point. Among other points of departure, we reduce the number of schools from 12 to 10. We include their 'activist' school in 'macromarketing' because it deals with consumerism or consumption in the aggregate. Also we fold their 'organizational dynamics school' into the 'institutional school' because we believe the behavioral dimensions of the former should be linked with the economic dimensions of the latter to more fully understand the operations of trading firms in channels of distribution. We also exclude 'functionalism', because it does not fit our (or their) definition of a school of marketing thought. Only a single marketing scholar – Wroe Alderson – described it in only two books; and more importantly we show that functionalism is subsumed within another school – marketing systems – that falls out of Alderson's work. Additionally, we include marketing history as a school, which was in an embryonic state when Sheth et al. (1988) were writing their book.

We define a school of marketing thought as:

1 a substantial body of knowledge;
2 developed by a number of scholars; and
3 describing at least one aspect of the what, how, who, why, when and where of performing marketing activities.

It is difficult, but useful, to distinguish schools of thought from sub-areas within marketing, such as advertising, sales management, or marketing research (Bartels, 1988). As a first approximation, schools represent a perspective on the whole or at least a large part of marketing, whereas sub-areas are elements within a school, usually within marketing management. Two sub-areas of great significance to the marketing field discussed only peripherally are advertising (see Bartels, 1988; Hotchkiss, 1933) and services marketing (see Fisk et al., 1993; Vargo and Lusch, 2004). Although advertising and services marketing have a larger following than many schools and despite their importance in their own right, space limitations preclude more than a passing discussion of any sub-area, except to the extent it impacts the development of a school.

Historical development of schools

The development of schools of marketing thought can be divided into four periods, roughly paralleling Wilkie and Moore's (2003) '4 Eras':

1 Pre-Academic Marketing Thought, prior to 1900;
2 Traditional Approaches to Marketing Thought, extending from roughly 1900 to 1955;
3 the Paradigm Shift, based on Alderson's work, from about 1955 to 1975; and
4 the Paradigm Broadening, mostly following Kotler's (and various co-authors) writings, from approximately 1975 to 2000.

Prior to the academic study of marketing, various thinkers dating back to the ancient Greek Socratic philosophers, Plato and Aristotle, discussed macro-marketing issues, such as how marketing was integrated into society (Shaw, 1995). Throughout the Middle Ages, the Medieval schoolmen, from St Augustus of Hippo to St Thomas of Aquinas, wrote about micromarketing concerns, such as how people could practice marketing ethically and without sin (Jones and Shaw, 2002). Most historians agree, however, that marketing as an academic discipline emerged as a branch of applied economics. Various schools of economics provided grist for the marketing mill at that time, particularly the Classical and

Neoclassical schools (Bartels, 1988), as well as the German Historical and American Institutional schools (Jones and Monieson, 1990). In addition to economics as a parent discipline, management also developed as a sister discipline in the early 20th century. Practical innovations, such as interchangeable parts and assembly lines were combined with innovative thinking in more efficient management practices. Pioneered by Taylor (1903, 1911) and Gilbreth (1911), 'Scientific Management' studied worker tasks and costs and time and motion, to produce efficiencies on the factory floor. Dramatic improvements in the factory system resulted in mass production, creating the necessity for understanding mass distribution to service mass consumption.

In the second period, the traditional approaches to understanding marketing thought developed. At the turn of the 20th century business was bustling in the United States. There was increasing migration to cities, the emergence of national brands and chain stores, rural free mail and package delivery, and growing newspaper and magazine advertising. The completion of the transcontinental railroad generated ever-increasing trunk lines to even small cities, larger cities developed mass transit, and growing numbers of automobiles and trucks travelled on ever-expanding roadways. These developments connected rural farmers, through agents and brokers, with urban consumers; and connected manufacturers with wholesalers, and wholesalers with retailers, and not just small specialty stores, but the new mammoth department stores and national mail order houses, to ultimately reach household consumers. The time was ripe for thinking about improvements in market distribution. As academic schools of business arose at the end of the 19th century, the first marketing courses in American universities were taught in 1902 (Bartels, 1988). To organize marketing's distinct subject matter, pioneer scholars in the newly emerging discipline developed the first three approaches to the scientific study of marketing phenomena: (1) cataloging functions; (2) classifying commodities; and (3) categorizing institutions. Now known collectively as the traditional approaches to the study of marketing (Bartels, 1988), they were used to argue against the popular complaint 'of high price spreads between farmers and consumers' and the widely held opinion of 'high costs, waste and inefficiencies in marketing'. Marketing *functions* demonstrated that the distribution and exchange activities performed by specialized marketing *institutions* (trading firms) in moving agricultural and manufacturing *commodities* from sources of supply to places of demand were socially useful and economically valuable (Jones and Shaw, 2002).

Period three, approximately between 1955 and 1975, is called a Paradigm Shift (following the phrase used by Wilkie and Moore, 2003). The paradigm shift from traditional approaches to modern schools of marketing thought resulted from several developments. It was influenced by military advances in mathematical modeling, such as linear programming, during the Second World War. Following the war, the shift in capacity from military production to consumer goods spurred economic growth in the United States creating supply surpluses and the concomitant necessity for demand generation activities by business firms. The paradigm shift was also affected by the Ford Foundation and Carnegie Foundation reports of 1959 calling for greater relevance in business education and providing foundation funding to produce significant curriculum changes. The most important cause of the paradigm shift in academic thought, however, was the thinking of the dominant scholar of his time – Wroe Alderson. Based on his numerous articles and presentations, marketing theory seminars, newsletters, and two seminal books (1957, 1965), the paradigm shift resulted in or impacted most modern schools of thought; including: marketing management; marketing systems; consumer behaviour; macromarketing; and exchange.

The fourth period, from about 1975 to 2000, is named the Paradigm Broadening. External forces were only involved in consumer behavior, where researchers from outside the field (particularly psychology) entered the marketing discipline (Sheth, 1992). In other schools, the major impetus for broadening the paradigm was again a dominant scholar. In this case the prodigious thinking of Philip Kotler (1972, 1975) and various co-authors (Kotler and Levy, 1969; Kotler and Zaltman, 1971; Levy and Zaltman, 1975). This movement resulted in a bifurcation in three schools: marketing management, exchange, and consumer behavior. The paradigm broadening expanded the boundaries of marketing thought from its conventional focus on business activities to a broader perspective embracing all forms of human activity related to any generic or social exchange.

The various schools of thought, pioneering scholars, questions addressed, level or focus of the school, and key concepts are summarized in Table 1.

Marketing functions school

Marketing functions was the first of the traditional schools to emerge in the embryonic marketing discipline. It addressed the question: what is the work of marketing? The functional approach was described by Converse (1945) as the most significant theoretical development of early marketing thought; indeed he compared it with the discovery of atomic theory because it sought to identify and catalogue the fundamental elements of the field. Few concepts in the marketing literature have so closely followed such a clearly delineated life cycle. The functional approach to understanding marketing began its introduction during the 1910s, underwent rapid growth in the 1920s, entered early maturity in the 1940s, peaked in the 1950s, began declining in the 1960s, and was discarded by the 1970s (roughly paralleling Hunt and Goolsby's 1988 review).

In what historians (Bartels, 1988; Sheth et al., 1988) generally regard as the critical work in the emerging academic discipline of marketing, 'Some Problems in Market Distribution', Arch Shaw (1912: 173) identified five functions of middlemen: '(1) Sharing the risk, (2) Transporting the goods, (3) Financing the operations, (4) Selling the goods, and (5) Assembling, sorting, and reshipping'. In a retrospective letter, Shaw (1950) described how he developed these ideas in 1910 as a student at the Harvard Business School; while studying the historical contribution of merchants to the economy, he searched 'for some simple concept by means of which these functions would fall naturally into definite classifications

Table 1

Schools of marketing thought

School	Selected marketing pioneers	Question(s) addressed	Level or focus of analysis	Key concepts and theories
Marketing functions	Shaw 1912, Weld 1917, Cherington 1920, Clark 1922, Converse 1922, Maynard et al. 1927	What activities (i.e. functions) comprise marketing?	Macro: • Marketing Middlemen	Value added by marketing activities
Marketing commodities	Shaw 1916, Cherington 1920, Copeland 1924, Breyer 1931	How are different types of goods (i.e., commodities) classified and related to different types of marketing functions?	Macro: • Trade flows • Types of goods	Classification of goods: • Industrial and consumer • Convenience, shopping and specialty • Products and services • Search and experience
Marketing institutions	Weld 1916, Nystrom 1915, Clark 1922, Maynard et al. 1927 Breyer 1934, Mallen 1967, Stern 1969, Bucklin 1970	Who performs marketing functions on commodities?	Macro: • Retailers • Wholesalers • Middlemen • Channels of distribution	Channels of distribution: • Market gaps and flows • Parallel systems • Depots • Transactions and transvections • Sorts and transformations • Postponement and speculation • Conflict and cooperation • Power and dependence
Marketing management	Alderson 1956, 1965, Howard 1956, Kelley and Lazer 1958, McCarthy 1960, Kotler 1967	How should managers market goods to customers (clients, patrons, patients)?	Micro: • Business firm as seller/supplier • Any individual or organization as supplier	• Marketing mix • Customer orientation • Segmentation, targeting and positioning
Marketing systems	Alderson 1956, 1965, Boddewyn 1969, Fisk 1967, Dixon 1967	What is a marketing system? Why does it exist? How do marketing systems work? Who performs marketing work?	Micro: • Firms and households Macro: • Channels of	• Interrelationships between parts and whole • Unity of thought • Marketing systems • Micro and macro marketing • Societal Impact

		Where and when is it performed?	distribution • Aggregate marketing systems	
Consumer behavior	Dichter 1947, Katona 1953, Engel et al. 1968, Kassarjian and Robertson 1968, Howard and Sheth 1969, Holloway et al. 1971, Cohen 1972	Why do customers buy? How do people think, feel, act? How can customers/ people be persuaded?	Micro: • Business buying • Consumer buying • Individual or household consumption	• Subconscious motivation • Rational & emotional motives • Needs and wants • Learning • Personality • Attitude formation and change • Hierarchy of effects • Information processing • Symbolism and signs • Opinion leadership • Social class • Culture and sub-cultures
Macro-marketing	Alderson 1965, Fisk 1967, Dixon 1967, Hunt 1976, Bartels and Jenkins 1977	How do marketing systems impact society and society impact marketing systems?	Macro: • Industries • Channels of Distribution • Consumer Movement • Public Policy • Economic Development	• Standard of living • Quality of life • Marketing systems • Aggregate marketing performance
Exchange	Alderson 1965, Kotler 1972, Bagozzi 1975, 1978, 1979, Shaw and Dixon 1980, Houston and Gassenheimer 1987, Wilkie and Moore 2003	What are the forms of exchange? How does market exchange differ from other exchanges? Who are the parties to exchange? Why do they engage in exchange?	Macro: • Aggregations of buyers and sellers in channels Micro: • Firms and households • Any two parties or persons	• Strategic and routine transactions • Social, economic and market exchange • Barter and market transactions • Generic exchange
Marketing history	Hotchkiss 1938, Bartels 1962, 1976, 1988, Hollander 1960, 1983, Shapiro and Doody 1968, Savitt 1980	When did marketing practices, ideas, theories, schools of thought emerge and evolve?	Macro: • Thought and practice Micro: • Thought and practice	• History of marketing practice • History of marketing thought

and their interdependence disclosed. The objective was to give order and usability to the knowledge of market distribution accumulated as of that time'.

L.D.H. Weld recognized that functions are 'universal', often shifting backward and forward in the channel of distribution: 'They are not always performed by middlemen, but often to a greater extent by producers themselves, [and] it should be noted that the final consumer performs part of the marketing functions' (1917: 306). Very similar to Shaw's list, Weld's listing includes seven functions: (1) risk bearing, (2) transportation, (3) financing, (4) selling, (5) assembling, (6) re-arrangement (sorting, grading, breaking bulk), and (7) storage. Although arranged and combined somewhat differently, the only new function added is storage.

Although no two authors' lists looked precisely the same, subsequent writers, such as Cherington (1920) with seven functions, Duncan (1920) with eight, Vanderblue (1921) with 10, Ivey (1921) with seven, Converse (1921) with nine, and Clark (1922) with seven functions, also entered the competition for the best list of functions. Each author added some, dropped others, aggregated several functions into one or disaggregated one function into several others. Clark (1922) ultimately reduced the number to as few as three (with sub-functions): exchange (buying and selling); physical distribution (storage and transportation); and facilitating functions (financing, risk taking, standardization). In the most comprehensive review of the literature to that date, Ryan (1935) expanded the list to more than 120 functions grouped into 16 functional categories. In one historical analysis of the functional approach, Faria (1983) opined that the most useful synthesis and most widely accepted list of marketing functions to 1940 was developed by Maynard et al. in 1927, but Faria offered no evidence in support of his opinion. Maynard et al. (1927) essentially extended Clark's (1922) list of seven functions to eight by adding marketing information. There does not appear to be much basis to argue one author's list of functions versus another list, other than to state the most parsimonious is that of Clark (1922) and the most detailed that of Ryan (1935).

That different writers could produce such varying numbers of functions presents an obvious problem with the concept. By 1948, the American Marketing Association Committee on Definitions expressed their dissatisfaction:

> It is probably unfortunate that this term [marketing function] was ever developed. Under it students have sought to squeeze a heterogeneous and non-consistent group of activities . . . Such functions as assembling, storage, and transporting, are broad general economic functions, while selling and buying are essentially individual in character. All these discrete groups we attempt to crowd into one class and label marketing functions. (cited in McGarry, 1950: 264)

Attempting to revive the functional approach, McGarry (1950) reconsidered the concept based on the purpose of marketing activity, which he regarded as creating exchanges. McGarry (1950: 269) believed he had arrived at six functions constituting the *sine qua non* of marketing:

- Contractual – searching out of buyers and sellers;
- Merchandising – fitting goods to market requirements;
- Pricing – the selection of a price;

- Propaganda – the conditioning of the buyers or of the sellers to a favorable attitude;
- Physical Distribution – the transporting and storing of the goods;
- Termination – the consummation of the marketing process.

Ironically, in attempting to breathe new life into functions, Hunt and Goolsby astutely observed that McGarry was sowing the 'seeds of its demise'. In their exhaustive search of the literature, they noted that McGarry's list of functions was much closer to the work of marketing managers than older listings of functions, 'McGarry was presaging the rise of the managerial approach to the study of marketing and the demise of the functional approach' (1988: 40). Although there were no new conceptual developments after McGarry, functions could still be found in the revised editions of earlier marketing principles texts (such as Beckman and a variety of his co-authors through nine editions from 1927 to 1973). As the principles' texts died out, so did the functional approach to marketing thought. The functions or work of marketing, however, later reemerged as channel 'flows' in the institutional school, and as managerial tasks in the marketing management school.

Commodities school

The commodity school focuses on the distinctive characteristics of goods (i.e. products and services) and primarily addresses the question: how are different classes of goods marketed? Most work in commodities involves categories of goods: 'Classification schemes have always been at the heart of the commodity approach because they are of critical importance in establishing the differences among various types of commodities' (Zinn and Johnson, 1990: 346). Although he did not use the terms industrial and consumer commodities, Cherington (1920: 21–2) discussed several categories of goods, including raw materials and component parts used in manufacturing and those goods that 'disappear from commerce to go into individual consumption or into household use'. Duncan (1920) distinguished between agricultural and manufactured commodities, noting that the analysis of commodities could be applied to any good, 'whether a material thing or service', anticipating issues of products compared to services (e.g. Judd, 1969; Lovelock, 1981; Rathmell, 1966; Shostack, 1977; Vargo and Lusch, 2004).

In Breyer's (1931) book, *Commodity Marketing*, each chapter followed a common method in describing the marketing of an individual product or service from original producers, through intermediaries, to final users, including such commodities as cotton, cement, coal, petroleum, iron, steel, automobiles, electricity and telephone services. Similarly, in Vaile et al.'s (1952) book, *Marketing in the American Economy*, there was also discussion of how some individual goods are marketed, including used cars and airplanes. In contrast to tracing the movement of individual commodities, Alexander (1951: 4) illustrated the aggregate flow of goods in the United States for 1939, from manufacturing, through manufacturer's sales branches, wholesalers and retailers, to industrial and household consumers. In an even more extensive study, Cox et al. (1965) explored the aggregate flow of goods in the United States for 1947, from agriculture, mining, fisheries, and other extractive industries, through wholesalers and other intermediate trade, to manufacturing and construction, to wholesaling and retailing, including imports, public utilities, transportation, and services to final users – including exports, government, businesses and households. Most work in the commodity school of thought involved neither individual commodities nor aggregate commodity flows, but rather was focused on the classification of goods.

The most influential classifier of commodities was Copeland (1924). First, he made a clear distinction between industrial and consumer goods based upon who bought the commodity and the use for which it was intended. Copeland recognized the demand for industrial goods was derived from the demand for consumer goods, a distinction largely taken for granted by subsequent scholars. Copeland identified five categories of industrial goods, and later services were added as a sixth category (McCarthy, 1960). Of the six categories, two involve capital goods, two are used in production, and two are expense items. Capital goods are generally depreciable and include the two most expensive categories: (1) installations; long-term capital items such as buildings and land; and (2) accessory equipment; shorter duration capital items such as trucks and computers. Other goods are used in the production process: (3) raw materials, such as silica, lead oxide, and potash heated to 1600 degrees Fahrenheit to produce glass; and (4) component parts, for example rubber tires, metal and plastic body parts, leather seats, and glass windows are assembled to produce an automobile. Expense items include categories to maintain and support the business: (5) supplies for maintenance, repair, and operating the business; and (6) services to support business operations (for example, accounting or custodial services). Copeland's industrial goods classification – with the addition of services – has barely changed over the decades of the 20th century (Perreault and McCarthy, 1996). Although the concepts remain the same, the term industrial goods is sometimes replaced with business goods or its shorthand expression – B2B (business to business marketing).

It is in the area of consumer goods classification, however, that the most extensive developments in the commodities school occurred. Most work on consumer goods classification is built on Copeland's original three categories: convenience, shopping, and specialty goods. Copeland (1924) credited Charles Parlin with suggesting two of the three categories. Gardner cited Parlin's (1912) categories as '(1) convenience goods, those articles of daily purchase required for immediate use, (2) shopping goods, those more important purchases that require comparison as to qualities and price, and (3) emergency goods those necessary to meet an unexpected occurrence' (1945: 275). Copeland subsumed Parlin's emergency goods in the convenience category.

In another work, not cited by Copeland, Parlin (1915: 298) anticipated specialty goods as well, noting those goods for which people 'may go some distance out of their way to find a desired brand'. Also anticipated by one of Copeland's colleagues at Harvard, Arch W. Shaw mentioned convenience and specialty goods. With the former, 'the consumer puts convenience first, either because the amount of money involved is small and values are standardized or because the nature of the product puts a premium on frequent small purchases close at home' (1916: 283). In the latter, 'a specialty [good] is the result of closer adaptation of a product to the needs . . . of the consumer' (1916: 125). Thus, Copeland's three categories of goods were in the air, so to speak, at the time he began organizing them into a coherent classification system.

Copeland clearly defined the three categories. Convenience goods are 'those customarily purchased at easily accessible stores'. Shopping goods include 'those for which a consumer wishes to compare prices, quality, and style at the time of purchase'. With specialty goods, however, consumers neither traveled to a convenient store location nor made comparisons while shopping. He thought this category so different he called it specialty goods, 'those which have some [special] attraction for the consumer, other than price, which induces him to put forth special effort to visit the store . . . and make the purchase without shopping' (1924: 14).

Although there were a number of rationales for the three categories of consumer goods, it was the specialty goods category that perked the most interest and raised the most questions among subsequent authors.

Holton (1958) conceptualized the distinction between the categories based on the benefits resulting from price and quality comparisons relative to searching costs. With convenience goods the benefits are small and with shopping goods the benefits are large compared to the cost of search. Specialty goods overlapped the other categories, and the distinction Holton made is that such goods had a small demand thereby requiring a buyer's special effort to find the relatively few outlets carrying them. Luck (1959: 64) rejoined Holton's disparagement of specialty goods by arguing 'the willingness of consumers to make special purchasing efforts is explanatory, consumer oriented, and useful'.

Although he used shopping and convenience goods categories, Aspinwall (1958b) took a very different approach to Copeland's classification than prior or subsequent authors. Using a continuous color scheme, where red stands for convenience goods, yellow for shopping goods and shades of orange for goods in between, he related five characteristics of goods to length of channel and type of promotion required based on summing the values on each characteristic. Convenience goods have a high (1) replacement rate, and are low on (2) gross margin, (3) amount of product adjustment or service, (4) time of consumption, and (5) search time. Based on these characteristics, such goods require long channels and broadcast advertising. Shopping goods have a low replacement rate, and are high on the other four characteristics. These goods require short channels and personal selling. The colors are meant to blend, and shades of orange goods could occur anywhere in between the red and yellow. Orange was more moderate in all characteristics, requiring mid-length channels and some broadcast promotion. The specialty category was not included in Aspinwall's classification.

Several rationales appeared in the literature justifying Copeland's three consumer goods categories. Bucklin (1963), using a decision-making approach, asked the question: prior to purchase, does the consumer have a mental preference map? If the answer is no, then price and quality comparisons are required, indicating a shopping good. If yes, a sub-question must be asked; will the buyer accept substitutes? If yes, then the buyer knows what she wants, any close substitute will work, and it is a convenience good. If no, the buyer knows what she wants, will not accept alternatives and extra search effort is required – a specialty good. Kaish (1967: 31) used the theory of cognitive dissonance to explain a buyer's willingness to put forth physical or mental energy. While convenience goods are not particularly important to the buyer, any brand will do, no mental cognitive dissonance, and minimal physical effort is required, shopping goods are important and 'arouse high levels of pre-purchase mental anxiety about the possible inappropriateness of the purchase [although anxiety is high] . . . it is reducible by shopping behavior'. Specialty goods are important and also have high pre-purchase anxiety but it is 'not readily reducible' by comparison shopping; their importance requires physical search to locate the special good and reduce the mental anxiety.

Based on product similarity and buyer risk, Bucklin (1976) subdivided shopping goods into two types: low-intensity and high-intensity shopping goods (similar to Krugman's (1965) concept of low-involvement/high-involvement goods). Following a similar path, but building on Kaish's work, Holbrook and Howard (1977) developed a two-dimensional map with physical effort on one axis and mental effort on the other. Based on the four quadrants, they also argued for including a fourth category of goods, termed preference goods (roughly similar to Krugman's low-involvement or Bucklin's low-intensity shopping goods), requiring some shopping effort, moderate risk and high brand preference.

Building on these conceptual developments, Enis and Roering (1980) combined two basic buyer considerations – physical effort and mental risk – with the marketer's concern for product differentiation and marketing mix differentiation (although it could be argued the product is just one element of the marketing mix). This results in a four-way classification relating buyer effort/product differentiation to buyer risk/marketing mix differentiation with suggestions for marketing strategies relating to each of the convenience, shopping, specialty, and preference quadrants.

After an exhaustive literature review of consumer goods categories, Murphy and Enis (1986) organized almost all articles classifying consumer goods, based on Copeland, into a table with two dimensions: effort and risk. Convenience goods are low effort and low risk; and marketer's can only employ limited marketing mixes. Compared to convenience goods, preference goods are slightly higher effort and much higher risk; and marketers can use a wider variety of mixes. Shopping goods are still higher on both effort and risk dimensions; here marketer's can use the widest range of alternative mixes. Specialty goods are the highest on effort and risk, but offer marketers the most limited range of alternative mixes. Murphy and Enis (1986: 30) concluded that based on the effort and risk dimensions of price/cost, the four-fold classification is 'superior' to all others.

They supported their conclusion with four arguments: (1) it is buyer oriented; (2) it is generalizable across all users [consumer, industrial], sectors [profit, non-profit] and goods categories [products, services]; (3) the new classification recognizes the central role of the benefit/cost bundle [benefits must equal or exceed the costs of a transaction]; and (4) it has the advantage of using familiar terminology.

From the 1920s to 1980s, Copeland's classification scheme produced one of the longest strings of conceptually building upon and improving an original idea, rather than abandoning a concept to the scrap heap of history or reinventing an old concept with a new name. Nevertheless, there are a number of alternative goods classification schemes in the literature, particularly categorizations featuring bipolar alternatives: low-involvement versus high-involvement goods (Krugman, 1965); products versus services (Lovelock, 1981; Rathmell, 1966; Shostack, 1977 etc.) and many others.

Another classification scheme attracting marketing interest is the work of Nelson (1970, 1974); he separated goods into two categories: search and experience, based on the relative costs of the good versus the costs of the search (building on Stigler's [1961] work on the marginal value of information). With search goods the benefits can be discovered by information search prior to purchase, such as a computer or camcorder. On the other hand, with experience goods the benefits can only be determined after purchase when the good is utilized, such as toothpaste or fast food restaurants. These goods do not require much search because they can be purchased inexpensively and discarded for an alternative brand if not satisfactory, or because the cost of search is high relative to the potential benefits. A third category called 'credence goods' was added by Darby and Karni (1973), where the attributes of goods cannot be easily verified before or after purchase. Credence goods require additional information search costs to determine the good's benefits or value, for example, a surgical operation or automobile repair that may not have been necessary. There is some similarity between Copeland's (1924), particularly Bucklin's (1963) version of it, and Nelson's (1970) goods classification schemas, and Krugman's (1965) schema as well. Shopping goods and search goods require information search prior to purchase and are usually high involvement except in the case of preference goods which are low involvement. Convenience goods and experience goods are inexpensive enough to allow sampling of alternatives or evaluation by purchase, do not require significant information search, and are typically low involvement. Specialty goods include but are not limited to credence goods and are very high involvement.

Institutional school

Marketing institutions refer to those who do the work of marketing, usually marketing middlemen, including wholesalers, agents, brokers, and retailers. Sheth et al. (1988: 74) wrote: 'L.D.H. Weld deserves credit as the founding father of the institutional school' based on his discussion of the value of specialized middlemen in performing marketing tasks. Weld (1916: 21) addressed the question: 'Are there too many middlemen?' The foundation of the institutional school is the emphasis on describing and classifying various types of marketing institutions, and later explaining their interactions in what Clark (1922) termed a 'channel of distribution' (Clark, 1922: 8).

Nystrom's *Economics of Retailing* in 1915 provided the marketing discipline with the earliest discussion of the development of retailing institutions (Bartels, 1988: 91). Nystrom (1915: 11) wrote that one major purpose of the book is to describe 'one link of the distributing system – retailing . . . to determine the most economical routes through which the goods may be transferred from producers to consumer'. Beckman's (1927) *Wholesaling* is credited as the marketing discipline's earliest book on wholesaling institutions (Bartels, 1988: 114). Beckman (1927: v) stated: 'wholesaling occupies a strategic position in the distribution of goods . . . the goal of which is a more efficient marketing system'. While retailing and wholesaling middlemen are major links in channels of distribution, both books focused primarily within the institution rather than discussing the linkages between institutions. Further, marketing institutions involve more than retailing and wholesaling middlemen.

Butler and Swinney (1918: 9) defined middlemen to 'include everyone who stands between the prime producer and the ultimate consumer and takes a profit for the risk he runs in addition to being compensated for the cost of his services'. This notion requires a distinction between marketing institutions and middlemen that has often been lost in historical discussions of the institutional approach. The distinction involves the idea of 'functional specialists'. Early on, Duncan (1920: 7) stated that 'functionalized middlemen, or those men, such as railroad men, insurance men, wholesalers, retailers, bankers, who devote their effort to a specialized phase of business activity . . . may be called an institution'. Thus, marketing institutions combine what would today be regarded as middlemen (wholesalers, agents, brokers, retailers, etc.) with what was termed functional specialists or facilitating institutions. Clark (1922: 89) dismissed this notion by including only middlemen in marketing institutions and excluding facilitating institutions: 'Functional specialists are agencies which specialize entirely in transportation, storage, risk-taking, and financing. These are not middlemen'. Breyer (1934, 1964) similarly distinguished between:

> trading concerns engaged primarily in selling and buying – producers, wholesalers, retailers, brokers, selling agents, commission houses, etc. . . . in contrast to non-trading concerns engaged in [facilitating] marketing activity, commercial banks, transportation and storage companies, insurance companies, and so on. (1964: 163)

The institutional school originally emphasized the description and classification of middlemen. Beckman and Engle (1937) and Beckman et al. (1973: 205) may be credited with the most enduring definitions and taxonomy.

> Middlemen stand between prime producers and ultimate consumers . . . All middlemen can be divided into merchant and functional middlemen . . . Merchant middlemen buy the goods outright and necessarily take title to them [e.g. wholesalers and retailers] . . . Functional middlemen assist directly in a change of ownership, but do not take title to the goods [e.g. auctions, brokers, manufacturers' agents, and selling agents].

There are clear definitions for each of the bracketed types of middlemen, and various types of wholesalers, retailers, and functional middlemen are further classified and defined. The Beckman and Engle distinction between wholesale and retail is a classic:

> Wholesaling includes all market transactions in which the purchaser is actuated by a profit or business motive in making the purchase, except for transactions that involve a small quantity of goods purchased from a retail establishment for business use, which transactions are considered as retail. (1937: 25)

There were few improvements on Beckman's original definitions and categorization schema, and the school evolved from description and classification of marketing institutions to explaining the economics and behavioral dimensions of channels of distribution.

Clark (1922) appears to have coined the term 'channel of distribution'. Breyer (1934, 1964: 163) characterized the channel as 'the elemental structure' of the marketing institution. Study of channels grew in popularity as several excellent books of readings appeared: Mallen's (1967a) *The Marketing Channel: A Conceptual Viewpoint*; Stern's (1969) *Distribution Channels: Behavioral Dimensions*; and Bucklin's (1970) *Vertical Marketing Systems*, among others. A number of economic and behavioral concepts, such as profit and non-financial rewards, power and dependence, conflict and cooperation, trust and commitment, are found in this rich literature. Several of these concepts are linked in a meta-analysis by Geyskens et al. (1999).

In a foundational theoretical analysis, Lewis (1968) identifies seven theories of marketing channels:

1 McInnes' (1964) 'Theory of Market Separations';
2 Vaile et al.'s (1952) 'Marketing Flows Theory';
3 Aspinwall's (1958a) 'Parallel Systems Theory';
4 Aspinwall's (1958b) 'Depot Theory';
5 Bucklin's (1965) 'Theory of Postponement and Speculation';
6 Alderson's (1965) 'Theory of Transactions and Transvections';
7 Alderson's (1957) 'Theory of Sorting'.

Unfortunately, Lewis did not integrate them in a meta-theoretical analysis.

Some of these represent mid-range theories that are subsumed under higher-level theories. Through much of the discipline's history, scholars have contributed to a rudimentary general theory of the marketing process based on channels of distribution. Although various authors explain it more or less clearly using a variety of differing terminology, the underlying constructs are fundamentally the same. The terms include: 'maladjustments' by Shaw (1916) and Clark (1922); 'obstacles,' 'resistances,' and 'channel circuits' by Breyer (1934); 'flows' by Vaile et al. (1952), Fisk (1967), and Dixon and Wilkinson (1982); 'discrepancies' by Alderson (1957, 1965); and 'separations' by McInnes (1964).

The terminology by McInnes (1964) and Alderson (1965) are easiest to follow. These authors begin with the relationships between makers and users of goods. It is argued that the potential for market interaction is created when producers become separated from consumers by the division of labor. As specialization increases, the division of labor becomes greater, the gaps created become wider, and the network of potential trading relationships becomes more complex. The potential for exchange, however, is not the same as an actual market transaction. Discrepancies (maladjustments, obstacles, resistances, separations) provide the opportunity for market activity to be performed by middlemen to bridge the gaps (close channel circuits, connect flows) separating original sellers from final buyers, thereby transforming transactional potentialities into actualities.

Simply stated, flows overcome separations. The gaps in the market include: 'space, time, perception (information), ownership and value' (McInnes, 1964: 57–8), and assortments (Alderson, 1965: 78). The flows bridging these gaps are, unfortunately, far more varied. Vaile et al. (1952: 113) proposed eight: three from seller to buyer (possession, ownership, promotion), three reciprocal flows between the parties (negotiation, financing, risking), and two flows from buyer to seller (ordering, payment). Fisk (1967) suggested five flows: communication, ownership, finance, physical distribution, and risk. Dixon and Wilkinson (1982) reduced the number to three fundamental flows: contact (information), contract (negotiation), and material fulfillment (physical distribution).

How fast do flows move to overcome separations and match a seller's small segment of supply with a buyer's small segment of demand? According to Aspinwall's (1958b) Depot Theory, goods move toward consumption at a rate established by the final consumer's need for replacement. As detailed in Aspinwall's (1958a) Parallel Systems Theory (discussed in the commodity school), replacement rate is inversely related to gross margin, services required, search time and consumption time. Thus, knowing replacement rate provides knowledge of the other characteristics determining rate of flow. The question of which institutional depot (manufacturer, wholesaler, retailer, household, etc.) in the channel will hold and modify inventory is addressed by Bucklin's (1965) 'Theory of Postponement and Speculation'. Alderson (1957) developed the postponement part, arguing that changes in modifying products and stocking inventory should be postponed to the latest possible point in the marketing flow because of reduced risk. Bucklin (1965) added the corollary theory of speculation that changes in form and holding inventory should be made at the earliest possible point in the marketing flow to take advantage of economies of scale. Thus, speculation takes advantage of the lower costs of modifying goods early to obtain economies of scale resulting in mass production, while postponement deals with reducing risk by modifying goods at the latest point for segmented demand resulting in today's mass customization.

Alderson's (1965) transvection represents one of the most powerful but underutilized constructs in marketing thought. A transvection includes all purchases and sales from the original seller, through intermediary purchases and sales to the final buyer of a finished product. That is, it links all the institutions (depots) in a channel. Alderson (1957, 1965) described what takes place in a channel-transvection in terms of 'Sorts and Transformations'. At each institutional depot, goods are alternatively sorted (sorted-out, accumulated, allocated or assorted) and transformed (modified, merchandised, stored, transported, or used). If the channel is regarded as structure, such as the banks of a river, then the transvection represents process, the flow of the river. Therefore, aggregating the set of parallel channel-transvections taking place in a particular economy, such as the USA, for a given time frame, say a year, provides 'an exhaustive description of the marketing process' (Alderson and Miles, 1965: 122). Thus, most fundamental theories of channels of distribution can be synthesized into a logically coherent whole.

Interregional trade school

There are two approaches to interregional trade, one quantitative and the other conceptual. Their common denominator is a concern with the question of 'where' marketing takes place. The quantitative approach follows Sir Issac Newton's 1687 'Universal Law of Gravitation'. One body (stars, planets, etc.) is attracted to another by a force that is directly proportional to the masses of the two bodies and inversely proportional to the square of the distance separating them. Using this insight, William Reilly's (1931) book, *The Law of Retail Gravitation*, provides the impetus for bridging the spatial gap in marketing. Following Newton, Reilly's Law states that given a small town between two large cities, the cities would attract customers from the small town in direct proportion to the populations [the mass factor] of the two cities and inversely proportional to the square of the distances separating the two cities from the intermediate town.

Converse (1949) made numerous tests of Reilly's formula. Then he extended Reilly's work to define the boundaries of a given trading area:

> A trading center and a town in . . . its trade area divide the trade of the town approximately in direct proportion to the population of the two areas and inversely as the square of the distance factors [distance weighted by an empirically determined inertia factor]. (1949: 382)

Converse's modification in the distance factor is significant, making it possible to determine the breaking point between two competing trading centers (and could in principle conceptually include cities, shopping malls, stores, etc.).

Huff (1964) expanded Converse's work to explain how a buyer chooses among several distant trading centers to purchase products and services. Huff refined both measures in Reilly's and Converse's formulas. He enriched the metric used for the 'size' or 'mass' of the trading center from population to square footage of selling area. He also improved the measurement for 'distance' from miles to time traveled.

Finally, Huff transformed the standard definition of a trading area from a seller's to a buyer's perspective. Huff criticized the AMA definition of 'trading area' as 'a district whose size is usually determined by the boundaries within which it is economical in terms of volume and cost for a marketing unit to sell and/or deliver a good or service', because it provided 'little insight concerning the nature and scope of a trading area' (1964: 19). Huff's (1964: 18) definition of a trading area resolves the issue of nature and scope: 'A geographically delineated region, containing potential customers for whom there exists a probability greater than zero of their purchasing a given class of products or services offered for sale by a particular firm or by a particular agglomeration of firms'. Apparently, Huff's work was regarded as definitive, because there have been virtually no additions or criticisms to gravitation models in the marketing literature since his 1964 article.

E.T. Grether is credited as the major developer of the conceptual side of interregional trade (Savitt, 1981; Sheth et al., 1988). Grether (1950: 509) explored regional exporting and importing based on four factors: (1) resource scarcity; (2) regional affluence; (3) reciprocal demand among regions; and the (4) relative competition within regions. Subsequently, in a section of his co-authored book (Vaile et al., 1952: 487–569), Grether refined the characteristics of different geographical regions and their impact on the export and import of products and services. He defined an economic region as a relatively large geographical area with four characteristics: (1) it has more than one center of economic control; (2) it has greater internal homogeneity (than other areas); (3) it exports a characteristic group of products to other areas; and (4) it imports the characteristic products of other areas (Vaile et al., 1952: 487).

Revzan (1961) provided a number of factors that impact the size of a wholesaler's trade area, such as high product value relative to bulk, transportation rates, and available channels of distribution. Savitt (1981: 231) regarded the core of interregional trade as recognition of the importance and interdependence of social and geographic factors that affect a firm and its relationship in channels. Based on the foundation laid by Grether, Revzan and Savitt, the factors affecting interregional trade in today's global economy could easily be replaced by international trade without any loss of conceptual continuity.

The 'where' of the interregional school of thought, along with the 'what', 'how', and 'who' of the functions, commodities, and institutions, were largely shoved aside by the paradigm shift creating new schools of thought in the 1950s, particularly the 'how to' emphasis of marketing management.

Marketing management school

Marketing management addresses the question: how should organizations market their products and services? The school focuses on the practice of marketing viewed from the sellers' perspective. The school originally limited the sellers' perspective to manufacturers, but now includes retailers, service providers and all other types of businesses; and with the paradigm broadening has been extended to all forms of non-business entities as well. This school so dominates the marketing field, it must be included as a school of thought rather than a sub-area even though it has only a micro-marketing focus (i.e. perspective of an individual unit of analysis). The impetus for a managerial perspective to marketing occurs in a book by Alexander et al. (1940), simply named *Marketing*, which was revised several times until 1953. Fundamentally, books in this genre are organized around the notion of a marketing mix. Although less pronounced in this book compared to those that followed, most elements of the marketing mix appear: distribution channels, price, product planning, selling, and advertising.

Several emerging concepts in the 1950s and early 1960s form the core of ideas leading to the rapid growth of this new school: Wendell Smith's (1956) notion of 'product differentiation and market segmentation as alternative marketing strategies'; Chester Wasson's (1960) idea of the 'product life cycle'; and Robert Keith's (1960) perspective of a consumer orientation known as the 'marketing concept'. Probably the most important concept, given that books in this school center on it, is Neil Borden's (1964) expression of the 'marketing mix'. In his classic article of its history, Borden credited James Culliton (1948) with describing the marketing executive as a 'decider', a 'mixer of ingredients'. The notion led Borden, in the 1950s, to the insight that what this mixer of ingredients decided upon was a 'marketing mix'. McCarthy (1960: 52) credited A.W. Frey's *The Effective Marketing Mix* in 1956 with the first marketing mix checklist.

Some of the earliest books titled *Marketing Management* were written by D. Maynard Phelps (1953), and Keith R. Davis (1961), although both focused on sales management. Another similarly titled book was *Management in Marketing* written by Lazo and Corbin (1961), but it focused on the management functions of planning, organizing and controlling as applied to marketing. None of these books, despite their titles, fit the emerging genre centered on the marketing mix and each soon went out of print. But the marketing management title remained.

Wroe Alderson's (1957) *Marketing Behavior and Executive Action* largely dealt with science, theory, and systems, but he devoted the last third of the book to executive decision-making in marketing. It had a monumental impact on the field. According to Bartels (1988: 178), 'Alderson with one sweeping stroke created a new pattern for considering marketing management'. Also influential, and published in the same year as Alderson's work, John Howard's (1957) book, entitled *Marketing Management*, emphasized elements of the marketing mix he called 'decision' areas: 'product', 'marketing channel', 'price', 'promotion – advertising', 'promotion – personal selling', and 'location' decisions. This was followed by Kelley and Lazer's (1958) *Managerial Marketing; a* book of readings organized around marketing mix elements termed 'strategic' areas: 'product', 'price', 'distribution channels', and 'communications'. In both books, the basic elements of the marketing mix are now in place. It was Gene McCarthy's (1960) textbook, *Basic Marketing: A Managerial Approach*, creating the marketing mix four P's mnemonic for 'product', 'price', 'promotion', and 'place', however, that swept the field and vanquished all marketing management texts before it.

Kelley and Lazer (1958) argued that the title managerial marketing makes more sense, because management modifies the subject of marketing, suggesting a sub-area of marketing, rather than the reverse that suggests marketing is a sub-area of management. Nonetheless, the title 'Marketing Management' emerged as the namesake for this new area of study. Taken together, Alderson, Howard, Kelly and Lazer, and McCarthys' books provided the critical mass that resulted in marketing management becoming the core course in the marketing curriculum and the dominant school of marketing thought.

Kotler's (1967) sales response model, termed the 'fundamental theorem of market share', provided a logically coherent rationale for the marketing mix. There are two conceptual points. First is the idea that a firm's sales are a direct response to changes in its marketing mix, ceteris paribus. The second idea is that a firm's market share responds directly to the effectiveness of its marketing mix and inversely to the marketing mix of the industry (or direct competition). Thus, a firm with an improved product, a reduced price, or more effective promotion or distribution, relative to the industry, will experience an increase in its sales response, and market share. Thus, the marketing manager's job is to find an optimal marketing mix, relative to competition, for a given customer segment.

A major development in conceptual thought occurred when Kotler and Levy (1969: 10) proposed broadening marketing (management) from its historical business context to the application of marketing mix techniques to non-profit organizations. Interestingly, in the same journal, Lazer (1969: 3) also proposed broadening marketing management, but in a different direction, to include its societal impact, noting 'that marketing must serve not only business but also the goals of society' (see macromarketing school). Although both approaches involve broadening marketing, Kotler's version refers to applying management techniques outside the conventional business arena, while Lazer's approach involves the social impact of conventional business (discussed in the macromarketing section). It is the Kotler approach that is discussed here under the rubric of marketing's broadened paradigm.

The issues as to whether marketing was a set of marketing management techniques applicable to all organizations and individuals or rather an economic institution designed to achieve social goals was debated during the following decades in various journals and proceedings (e.g. Arndt, 1978; Bartels, 1988; Kotler, 1972, 1975; Luck, 1969, 1974; Sweeney, 1972). But marketing management textbooks also affected academic opinion. During the 1980s, Kotler's *Marketing Management* surpassed McCarthy's *Basic Marketing* for largest share in the textbook market. Thus, in the competition for students' minds, Kotler's line of books came to dominate all segments of the marketing management text market. (Cunningham, 2003). This is noteworthy because McCarthy's book retained marketing's conventional business context, while Kotler's textbooks broadened marketing in the sense of application of marketing mix techniques to deal with any social or personal cause.

This paradigm broadening dramatically redraws the subject matter of the discipline, because marketing management for laymen and many academics is synonymous with marketing. And the broadened position, according to Kotler, is indeed expansive: 'The marketer is a specialist at understanding human wants and values and determining what it takes for someone to act' (1972: 53). This applies marketing management techniques to any organization or person with something to 'sell', at least in the secondary dictionary meaning of sell 'to persuade or influence' (Merriam-Webster, 1994: 1062). Given this view of marketers, the broadened marketing paradigm was anticipated by Dale Carnegie (1964, i) who advised individuals to employ every word and act to 'win friends, clients and customers' and 'influence people to your way of thinking'.

There is a cost to the broadening paradigm. While the discipline appears broadened by transferring management technology to non-profit entities, Bartels (1988) believed its scope has actually narrowed, by limiting the perspective to individual gain rather than social impact beyond the parties. Sheth and Garrett (1986: 1) concurred with the limiting marketing to marketing management view: 'The boundary expansions of marketing [management] have resulted in limiting our perception of marketing to selling and promotion'. As these historians remind us, there are more schools to marketing thought than just the single perspective of marketing management, even if many, if not most writers, regard it synonymously with marketing.

In his review of marketing management, Webster (1992) also emphasized broadening marketing management, but in another direction than Kotler's version. 'An expanded view', wrote Webster (1992: 13), that addresses 'the role of marketing in firms that go to market through multiple partnerships [channels, strategic alliances, and relationships]'. Webster's expansion retains marketing's conventional business context and also links marketing management to the institutional school. Nevertheless, Kotler's version of the broadening concept remains the dominant perspective.

Research in marketing management, despite the popularity of the paradigm broadening, is primarily business oriented and focuses mostly on marketing strategy, segmentation and targeting, or elements of the marketing mix: product, price, promotion, place, and market research. One sub-area of the mix receiving much research attention is the product 'P'. Ironically, in early definitions of marketing, products were defined out of the field. For example, a fairly common early definition of marketing is 'the creation of place, time, and possession utility' (Converse and Huegy, 1930); and 'form utility' or product is explicitly excluded from marketing and relegated to production (farming or manufacturing). Another irony in the product P is that most related research today is centered on services rather than products (see Fisk et al., 1993; Vargo and Lusch, 2004) as a distinct sub-area of marketing management study. Indeed, Vargo and Lusch (2004) made a robust argument that services are more fundamental because consumers only want the service benefits a product offers. This view – that products only provide a delivery vehicle for service benefits – is a position likely to stir considerable debate, an analysis of which will have to await future historical hindsight. In any case, marketing management has become so large a school of thought that the number of researchers in some of its sub-areas such as services or advertising exceed the number of researchers in most of the other schools. Of the first two marketing schools created by Alderson's paradigm shift, management and systems, the latter represents the road less traveled.

Marketing systems school

Marketing systems addresses all questions of marketing. For example, what is a marketing system? Why does it exist? Who engages in marketing? Where and when is marketing performed? How does it work? How well is the marketing system performing? The first author to use systems terminology in marketing was Wroe Alderson (1957), whose book *Marketing Behavior and Executive Action* discussed: 'organized behavior systems' (1957: 35) 'survival and growth of systems' (1957: 52) 'input – output systems' (1957: 65) among some four dozen references to systems concepts. Although not cited, Alderson was clearly influenced by Kenneth Boulding's (1956) 'General Systems Theory – The Skeleton of Science'. Boulding popularized the notion of a system of systems and specifically credited the name 'General Systems Theory' and the core of his ideas to its founding father – Ludwig von Bertalanffy's (1951) *General Systems Theory: A New Approach to a Unity of Science*.

Alderson (1957, 1965) termed his scientific approach to marketing thought as 'Functionalism' but it is better described as 'Systems', even by him:

> Functionalism is that approach to science which begins by identifying some *system* of action [e.g. marketing] and then tries to determine how and why it works as it does. Functionalism stresses the whole *system* and undertakes to interpret the parts in terms of how they service the *system*. Some writers . . . prefer to speak of the holistic approach because of the emphasis on the *system* as a whole. (Alderson, 1957: 16–17; italics added)

Almost every Alderson reference to the term functionalism uses systems concepts to explain it. Unfortunately, in 1965, Alderson passed away four months prior to the publication of his definitive work, *Dynamic Marketing Behavior*, which was mostly pieced together by colleagues from rough drafts and loose notes (1965: v). It is interesting to speculate that had he lived longer, given his forward thinking, Alderson himself might have shifted conceptually from functionalism (entering the decline stage of its life cycle in the social sciences) to general systems theory (beginning its growth stage). There is some basis for this speculation; in one of his last sole authored writings: 'A Normative Theory of Marketing Systems', functionalism is only mentioned briefly in a few sentences, apparently as an afterthought, while Alderson (1964: 105) expresses his 'commitment to the total systems approach'.

While Alderson developed the foundations of marketing systems thinking in his articles, books, and marketing theory seminars, the work was carried forward by his students and colleagues. Fisk's (1967) textbook, *Marketing Systems: An Introductory Analysis*, delineated micro- and macro-marketing systems. Dixon (1967), taking a macro perspective, showed how the marketing system was integrated into the larger society of which it forms a part. Boddewyn (1966) developed a framework for comparative marketing systems research focusing on the structure, function, process, and environment in which actors engage in marketing. Between the macro and micro, Bucklin's (1970) 'Vertical Marketing Systems' described the economics of channels as systems, Stern (1969) described their behavioral dimensions, and Mallen (1967b) worked on channel interrelationships as 'management decision systems. At the other end of the spectrum, taking a micro perspective, Lazer (1971) used a systems approach to analyse marketing management. And, of course, Alderson (1957, 1965) originally identified households, as well as firms, as organized behavior systems.

It appears obvious that any attempt to synthesize schools of marketing thought, or develop a general theory of marketing, must include systems thinking at least as a superstructure. Nevertheless, discussions of marketing systems, per se, declined during the 1970s (although partially reemerging in macromarketing below) with the rise of marketing management and consumer behavior.

Consumer behavior school

Because it deals with human behavior, consumer behavior is one of marketing's most eclectic schools of thought. The school initially dealt with questions of buying (search and selection) and consuming (use and disposal). Although buyer and consumer are usually lumped together, it is sometimes more fruitful to view them as different roles people play because there are some notable distinctions between them. For example, a product or service may be bought by one individual and consumed by another, requiring the buyer to anticipate the user's likely satisfaction. The buyer evaluates the deal made for a product or service and the consumer evaluates the satisfaction received, either a bad deal or unsatisfactory experience is less likely to result in repurchase and use (Assael, 1998). Despite the distinctions, buying and using are generally subsumed under the term consumer behavior, which has also broadened far beyond this traditional domain.

Originally drawing from economics 'consumer as utility maximizer', consumer behavior extended to Freudian psychology 'consumer manipulated by subliminal messages', to Pavlovian psychology 'consumer conditioned by repetitive advertising', to psychophysics 'consumer sensory thresholds sensitized by just noticeable differences', to cognitive psychology 'consumer overwhelmed by information processing and risky decision making', to social psychology 'consumer swayed by opinion leadership and social influence', to sociology 'consumer immersed in social class and subcultures', and even to anthropology 'consumer subject to folklore, ritual, myth, and symbolism'.

Prior to the 1950s, there were numerous psychologists, social psychologists, sociologists and economists whose work influenced the early development of CB in marketing thought. Sheth et al. (1988) mention such well known names as Maslow, Festinger, Homans, Rodgers, Osgood, Simon, Katona, Katz and Lazerfield, among many others. Around the 1950s, motivation researchers in marketing, such as Ernest Dichter, followed a Freudian bent. They suggested, for example, that women buying cake ingredients rather than pre-mixed were subconsciously giving rise to birth; and men buying red convertibles rather than more traditional cars were subconsciously acquiring mistresses (Bartos, 1977). Although leading to some useful psychological methods such as in-depth interviews, projective techniques, and focus groups, conceptually this research largely turned into a dead end, and most subsequent scholars prefer to forget the early emphasis on subconscious motivation.

As a school of marketing thought, consumer behavior began its growth stage in the 1960s with the integration of concepts (including cognitive psychology, risk taking, opinion leadership, information processing and other ideas from psychology to sociology) into comprehensive models of buyer behavior. These models include environmental and marketing stimuli as inputs, affective and cognitive mental processing, a hierarchy of behavioral outputs leading to purchase, and learning providing feedback. Although Nicosia (1966) produced the first model, the two most well-developed models are those in Engel et al.'s *Consumer Behavior* (1968) and Howard and Sheth's (1969) *The Theory of Buyer Behavior*. As the foundation of their textbook, Engel et al.'s model was used mostly for pedagogical purposes. Howard and Sheth's model was more research oriented, was actually tested, received some empirical support (Farley and Ring, 1970), and a partial formalization of constructs was made by Hunt (1976). A metatheoretical analysis of all three models along 16 subjective criteria was made by Zaltman et al. (1973). Despite their lack of clear operational definitions and specification of functional relationships, the component parts of these models provided fertile grounds for subsequent research in consumer behavior.

The popularity of consumer behavior spread as several books of readings appeared: Kassarjian and Robertson's *Perspectives in Consumer Behavior* in 1968, Holloway et al.'s *Consumer Research: Contemporary Research in Action* in 1971, and Cohen's *Behavioral Science Foundations of Consumer Behavior* in 1972, to mention a few. In 1969 a Workshop on Consumer Behavior became the Association for Consumer Research (ACR), and in 1974 the ACR published its first *Journal of Consumer Research* (*JCR*). Having its own association provided researchers cohesion and networking capability, the conference and journal offered publication outlets and these events spurred even more research in consumer behavior.

Designed as a 'medium for interdisciplinary exchange', the *JCR* broadened the boundaries of consumer behavior far beyond 'purchase, consumption or usage' to virtually any human behavior, including: 'family planning behavior, occupational choices, mobility, determinants of fertility rates', among many other non-market related topics (Frank, 1974: iv). With this broadening, a substantial number of non-business researchers from across the behavioral sciences, particularly psychology, have published in the journal and entered the marketing field. Most of these researchers were not particularly interested in the managerial implications of persuading consumers to purchase products or services. They were more concerned with consumer behavior as an *end* of study in itself, whether resulting from market purchases or not, rather than a marketing management *means* to a sale (Sheth, 1992). This created another bifurcation in marketing thought. A schism so severe that leading scholars such as Kotler (1973) felt compelled to write an article titled: 'Buying is Marketing Too!'; and Sheth and Garrett predicted a 'divorce between marketing and consumer behavior' (1986: 221).

Holbrook noted:

> The field of consumer research . . . currently find themselves in a crisis of identity . . . [The] *JCR* has lately come to embrace a variety of topics once thought too arcane or abstruse for a scholarly publication devoted to the study of consumer behaviour . . . It has grown so encrusted with connotations arising from its association with other disciplines that, by now, it stands for everything, which in this case tantamounts to nothing. (1987: 128)

As an indication of how far consumer behavior has withdrawn from marketing, Wilkie and Moore (2003: 133) stated, 'our count of the nearly 900 articles published by the *Journal of Consumer Research* in its first 20 years showed that the word "marketing" appeared only three times in an article's title'. A fraction of a percent is avoidance behavior. Apparently, marketing was not acceptable to non-business researchers because marketing was not respectable (but this perception is changing; see the exchange school below). Thus, consumer behavior, like marketing management, has broadened beyond the traditional marketing domain to include all behavior related to consumption from any source, including self production, gift giving, government largess, charity, theft, etc., not just purchase behavior; even though Kotler (1980: 20) himself regarded only acquisition from exchange as giving rise to marketing.

After the comprehensive models of the late 1960s, the creation, change, consistency and complexity of attitude, particularly Fishbein's (1967) 'attitude choice model', became the hot topic area during the 1970s. From the 1980s through the 1990s, information processing appears the most pervasive topic of interest (based on the JCR index of Volumes 1–20), although CB concepts are so numerous that none comes close to dominating.

With its broadening far beyond purchasing and even consumption, consumer research now covers the spectrum of the social sciences, and has almost become an academic college of thought in itself rather than a school of marketing thought. An illustrative, but non-exhaustive set of popular topics of this school include: motivation; personality; influence; selective attention; perception and retention; needs hierarchy; classical and operant learning; emotions; information processing; opinion leadership; hierarchy of effects; diffusion and adoption of innovation; subcultures and cross-cultures; joint decision-making; household gift-giving; buying and consuming; family life cycle; social influence; affect; cognition; intentions and choice; signs; semiotics and symbolism; information search; involvement; memory; persuasion theory; hedonics; imagery; prospect theory; judgment; variety seeking; polarization; and deviant behavior; among others. Among marketing academics, the study of consumer behavior appears second only to marketing management in popularity.

Macromarketing school

With the overwhelming popularity of marketing management and consumer behavior, interest waned in the general systems approach. In reaction to the growing micro-oriented schools, and driven by a desire to resurrect Alderson's systems thinking, several scholars sought a return to the larger dimensions of marketing and focused on the part of Fisk's (1967) system's schema involving macromarketing. This school addresses big picture questions, such as how does the marketing system impact society? Or how does society impact the marketing system? Or how productive is the aggregate marketing system?

Although the terminology was different, the fundamental concept of viewing interacting parts in terms of their contribution to the whole, characteristic of macromarketing systems, is anticipated in the works of Breyer's (1934) *The Marketing Institution*, Duddy and Revzan's (1947) *Marketing, An Institutional Approach*, and Vaile et al.'s (1952) *Marketing in the American Economy*. For example, Breyer spoke of the need for a 'unified study of marketing . . . not as a device for garnering individual profit but as a social instrument designed to serve the best interests of the public at large' (1934: vi). Duddy and Revzan viewed the 'marketing structure as an organic whole made up of interrelated parts, subject to growth and change and functioning in a process of distribution that is coordinated by economic and social forces' (1947: vi). But these were voices in the wilderness, outside mainstream marketing thought which at that time was concerned with functions, commodities, and institutions. It took Alderson, who dominated marketing thinking, to bring these ideas to the forefront of marketing thought. But even Alderson (1957), who devoted two thirds of his pioneering book to science, theory, and systems, was recognized by Bartels (1988) for the part devoted to marketing management.

In contrast to micromarketing, which he viewed as individual firms or households, Fisk (1967, iv) regarded macromarketing as representing an aggregation of these units; and he dedicated his book, the first titled *Marketing Systems*, to Alderson, Breyer and Cox 'who taught the ABC's of marketing to many grateful students'. Lazer (1969) and also Kelley (1969) argued for a greater focus on marketing management's impact on society, because both believed marketing should not be conceived narrowly in terms of individual profit, but in the larger context of social benefit. Subsequently, Bartels and Jenkins emphasized that macromarketing:

> has meant marketing *in general* . . . the marketing process *in its entirety*, and the *aggregate* mechanism of institutions performing it. It has meant *systems* and *groups* of micro institutions, such as channels, conglomerates, industries, and associations in contrast to their individual component units . . . it has meant the *social context* of micromarketing . . . It has also meant the *uncontrollable environment* of micro firms. (1977: 17; original emphasis)

The first macromarketing conference was held in 1977, during which an association was formed and soon followed by the *Journal of Macromarketing* (JMM) in 1981. As in consumer behavior, the conferences and association generated awareness and offered networking opportunities; additionally the journal provided research outlets in this new field of not-micro marketing. But issues immediately arose as to what subject matter constituted macromarketing. In reflecting on the first macromarketing seminar, White (1980: 11) points out the importance of systems: 'Use of the term marketing systems or aggregate marketing systems was intended to distinguish macromarketing which involves groups, networks or sub-systems of firms from micromarketing as the study of the firm'.

Perhaps the most widely accepted view of what constitutes its subject matter was Hunt's (1981: 8) definition of macromarketing as the study of marketing systems, their impact on society, and society's impact on marketing systems. An extensive examination into what is or should be included in macromarketing, in contrast to micromarketing (marketing management and consumer behavior), was made by Hunt and Burnett (1982: 24). Based on respondent definitions, it was thought macromarketing should include one or more of: a societal perspective; a high level of aggregation; the consequences of marketing on society; the consequences of society on marketing; and anything involving marketing systems (in the aggregate). Currently, the *Journal of Macromarketing* includes such topical areas as: competition and markets; global policy and environment; marketing and development; marketing history; and quality of life.

Many scholars noting the academic popularity of the micro areas of marketing management and consumer behavior decry this lack of attention to bigger societal issues and argue this area of marketing is too important to ignore. After a comprehensive historical analysis of the marketing societal interface, Wilkie and Moore (2003: 142) closed with the comment, almost lament: 'the questions, insights, principles, and discoveries that constitute marketing and society should not be left out of the minds of future marketing thought leaders'.

Exchange school

This school focuses on such questions as: who are the parties to an exchange? What is the motivation of the parties to reach agreement? What is the context of exchange? Most marketing theoreticians have argued that exchange is the heart of marketing (Alderson, 1965; Bagozzi, 1975, 1978; Hunt, 1976; Kotler, 1972; McGarry, 1950; McInnes, 1964; Sheth and Garrett, 1986). As Adam Smith (1776/1937: 17) keenly observed long ago, the division of labor is the fundamental organizing principle of groups and society, and 'given a division of labor there must be exchange'. Given the pervasiveness of exchange in human interactions, marketing thinkers have raised questions about its nature. As with broadened marketing management and consumer behavior, the exchange school has also bifurcated along two divergent paths: the traditional one focusing on marketing transactions (i.e. buying and selling) and the broadened path based on generic or social exchange (i.e. generalized giving and receiving).

The initial impetus for the exchange school of marketing was Alderson and Miles' (1965) article (reprinted as a chapter in Alderson's 1965 book) titled: 'Transactions and Transvections'. Alderson (1965: 83) argued: 'The transaction is a fundamental building block which suggests possibilities for a more rigorous type of marketing theory'. Alderson extended Breyer's (1934) notion of the purchase-sale transaction. Breyer's conception was, in turn, built on arguments of 'business practice and legal grounds' developed by Commons (1924: 245), who argued:

'Marketing is not an *exchange* of commodities – it is a *purchase and sale*' (original emphasis). Commons made the point that marketing is far more than a general exchange of one thing for another; market exchange involves an institutional process of great social value (Shaw, 1995).

Alderson went on to expand the concept of a purchase and sale in an individual market transaction into a theory of market transvections. He regarded the transvection as the set of market transactions from the original seller of raw materials, through all intermediate purchases and sales, to the final buyer of a finished product (see theoretical linkages in institutional school). Aggregating the set of transvections for a given time period, say a year, in a given place, say the USA, provides an exhaustive description of a society's aggregate marketing process. Although there were a few incremental developments along this route, with the death of Alderson the idea of market or contractual exchange morphed into generic (or social) exchange. That is, the focus of exchange shifted from contractually-oriented market transactions, removed from its institutional framework of channel – transvection, to any form of human exchange, irrespective of context, including gift-giving, the exchange of votes for political promises, or exchanging donations to religious organizations for promises of salvation. According to Kotler's (1972: 48) generic view: '*A transaction is the exchange of values between two parties.* The things-of-value need not be limited to goods, services and money; they include other resources such as time, energy, and feelings' (original emphasis). Four necessary, but not sufficient, conditions for exchange are proposed:

1 at least two parties;
2 each with something of value to the other;
3 capable of communicating;
4 and accepting or rejecting the exchange.

Generic exchange deals with 'how' some marketing management techniques, particularly persuasive communication, can be used in a non-business setting, such as social, political, religious or even personal causes. It goes beyond the profit motive or economic value, to encompass any motivations and any values between any parties, including exchanging beliefs, feelings and opinions. The problem posed for marketing thought is that there can be no distinct subject matter without disciplinary boundaries. It appears obvious that almost all human interactions affect people's feelings or opinions to some degree. Consequently, Sheth and Garrett (1986: 773) pointed out: 'marketing must limit itself to exchanges of economic values . . . [or] it is likely to be blurred with other disciplines, such as social psychology and group dynamics'. As an illustration of blurring marketing's subject matter Laczniak and Michie (1979: 220) listed: 'the exchange of wedding vows', 'plea bargaining by a felon', and 'a phone call' among other forms of generic exchanges. According to these critics, such examples of exchange make marketing's subject matter and disciplinary boundaries ambiguous at best and incomprehensible at worst.

Bagozzi (1975, 1978, 1979) undertook the most extensive theoretical work in explaining Kotler's generic exchange concept. The culmination of Bagozzi's work was an attempt to formalize a generic theory of exchange. He conceptualized three dependent variables (1979: 435–6): 'outcomes, experiences and actions' and four determinants (the first three from his 1978 article): social influence, social actor characteristics, social contingencies, and third party effects. Following the conceptualization, Bagozzi formalized his theory with a series of structural equations. The formal theory was criticized on several grounds by Ferrell and Perrachione (1980: 158–9). It 'relies on standard economic equations that few, if any, economists have ever been able to empirically test' . . . it 'restates exchange theories of other disciplines' but it 'does not qualify as a formal theory (or even the basis for a formal theory) of marketing exchanges . . . what Bagozzi has developed is a conceptual framework and some loosely related functional equations'. Essentially, they said there was a disconnection between Bagozzi's conception and formalization. When translating his conceptualization into formal theory, the richness of the concepts are lost, on the one hand, and there is little gain from formalizing economic maximization equations that bear scant resemblance to marketing behavior, on the other.

In attempting a more scientific approach, Hunt (1983: 13) proposed: 'marketing is the behavioral science that seeks to explain exchange relationships'. From this definition he deduced four fundamental explananda (phenomena to be explained) 'directed at facilitating or consummating exchanges'. These include: the behavior of (1) buyers and (2) sellers, (3) the institutional framework in which exchange between buyers and sellers occur, and (4) the consequences on society of the behaviors of 1, 2, and 3. Hunt's four explananda has avoided the criticisms of other conceptual approaches to exchange because of excessive inclusion (all forms of exchange) or critical exclusion (the institutional and social setting for market exchange).

Broadening the notion of a market offering from 'goods and services', Houston and Gassenheimer (1987: 16–17) included: 'ideas, personalities, organizations, media of exchange, places, exchange experiences, and exchange consequences' as potential values in a generic exchange. They concluded: 'exchange can and should serve as the theoretical hub around which other marketing theories connect to form an integrated structure'. Except for goods and services moving through channels, this hub appears to involve any pair of actors, irrespective of the institutional context and social impact, and therefore does not seem to require much other marketing theory than persuasive communication to describe a generic exchange.

Like broadened marketing management, there has also been criticism of generic exchange (e.g. Arndt, 1978; Ferrell and Zey-Ferrell, 1977; Laczniak and Michie, 1979; Luck, 1974; Shaw and Dixon, 1980). Nevertheless, by the early 1980s significant debate was over, social exchange had won hands down (Hunt, 1988), and new generations of marketing students learn the generic concept of exchange as dogma. It is now largely taken for granted, an accepted and powerful idea among students of marketing thought.

Moreover, by applying marketing across the social spectrum, no other idea has changed the popular perception of marketing so much as the concept of generic exchange. Many writers have spoken about the low esteem, if not contempt, in which marketers were held throughout history (Cassels, 1936; Kelley, 1956; Steiner, 1976). The tag line attached to the tradesman was epitomized in the title of Farmer's (1967) article: 'Would You Want Your Daughter to Marry a Marketing Man?' The answer was a resounding 'No' because marketing did not appear respectable. Certainly that perception has changed with broadened marketing management and generic exchange. Nowadays your daughter might well be a highly regarded marketer employed by either a business firm or charitable organization. By popularizing the notion of marketing (shorthand for marketing management techniques) for all causes, issues, and situations, marketing has gone from being bad-mouthed to being highly praised. The marketer charged with drumming-up clients, patients, and patrons, often in fund-raising for various causes, is usually named the development officer and applauded for their marketing abilities.

The positive aspect of generic exchange is giving marketers a respectable character rather than being regarded as corrupt or immoral. On the other hand, by expanding marketing practice to virtually all social activity, generic exchange does not fit within the historical context of marketing. Generic exchange might serve as a basis for a general theory of sociology or social psychology, but excluding core business concepts of sellers and buyers, profit motivation, and economic valuation, it is hard to conceive of social exchange, per se, serving as the foundational hub for a general theory of marketing.

Marketing history school

Marketing history addresses questions of when practices and techniques, concepts and theories were introduced and developed over time, as well as their interactions with each other. The first writer to suggest marketing history as a school of thought was E.T. Grether (1976). He examined the *Journal of Marketing* from its origin in 1936 through four decades of publication and divided it into 12 categories, including marketing history. Given its origins in the German Historical School of Economics (Jones and Monieson, 1990), it could be argued that an historical approach existed in marketing before any other school of thought. Yet, it is only during the past 20 years or so that marketing history has developed a critical mass of active scholars and research publications.

Between 1930 and 1960, historical research in marketing dealt with the development of the discipline (Bartels, 1962; Converse, 1933, 1945, 1959; Hagerty, 1936; Litman, 1950; Maynard, 1941a, 1941b; Weld, 1941) as well as with retailing and wholesaling history (Barger, 1955; Beckman and Engle, 1937; Jones, 1936; Marburg, 1951; Nystrom, 1951). There was one general history of marketing distinctive for its scope and historical perspective during this early period, Hotchkiss' (1938) *Milestones of Marketing*.

During the 1960s there was a transition towards more integrative histories of practice and thought (Converse, 1959; Hollander, 1960, 1966) and the publication of more substantive works (Bartels, 1962; Schwartz, 1963; Shapiro and Doody, 1968) that seemed to signal a maturing and growth of interest. It was sporadic, however, and it was not until the early 1980s, under the leadership of Stan Hollander that historical research in marketing developed the numbers and quality warranting recognition as a school of thought. In 1983, the first North American Workshop on Historical Research in Marketing took place at Michigan State University and has been held biennially since then. By 1989, the proceedings title of the conference proclaimed marketing history as an 'emerging discipline'. This may have been premature, but only by a decade. By the late 1990s, the research presented at the renamed 'CHARM' (Conference on Historical Analysis and Research in Marketing) has generated a growth of publications in scholarly books and in leading academic journals, as well as a regular section in the *Journal of Macromarketing*. It has also resulted in the formation of an Association for Historical Research in Marketing in 1999. Attendance at the CHARM meetings increasingly represents a broader range of scholars than those working in business schools as marketing historians build a dialogue with social, economic, and business historians. In addition to CHARM, there are parallel history associations, such as the United Kingdom-based CHORD (Center for the History of Retailing and Distribution) and the Business History Conference which includes historical research in marketing.

Historical research in marketing has matured methodologically (Brown et al., 2001; Golder, 2000; Jones, 1993; Nevett, 1991; Smith and Lux, 1993; Witkowski, 1993); and it has broadened to encompass a wide range of marketing thought and practices (although not nearly so far as the broadened concept, which would make marketing history virtually indistinguishable from social history). Historical research extends beyond North American borders to describe marketing thought and practice in other countries, and reaches back prior to the 20th century to describe the ideas of early thinkers and techniques of early practitioners from ancient civilizations to the present. There is also increasing recognition of the way in which marketing was shaped by practitioners, critics, and regulators, in addition to scholars. In exploring its past, historical research appears to have a growing future as a school of marketing thought.

Conclusion

During the early 20th century, marketing developed from individual concepts to theories, into streams of research, and onto common approaches to subject matter, now termed schools of marketing thought. Each of the schools described in this article addresses one or more perspectives to marketing thought by raising fundamental questions the school seeks to answer: What functions or activities make up marketing? How are various commodities marketed? Who performs marketing activities? How should marketers' manage their marketing mix? Why do consumers' buy one brand versus another? Where do marketing activities take place? When does marketing occur? Why does marketing exist? What is marketing's impact on society? How well does the marketing system work?

Researchers within a school seldom recognize the existence of other marketing schools, let alone the relationship of one to another. And yet, as Hollander (1980) observed, no single school by itself provides a satisfactory analysis to the whole of marketing thought. Studying each school of marketing thought independently to grasp the totality is like each of the six blind men examining an elephant and thinking their particular part represents the whole. So, what is the status of marketing thought as a whole? How do these bodies of knowledge called schools relate to each other? Why is marketing thought at a crossroads? Which path will resolve the fundamental problem? History provides a guide.

At the dawn of the 20th century, pioneers of marketing thought sought to carve out distinct subject matter for the newly emerging academic discipline of marketing. These early thinkers worked within a common framework of functions, institutions, commodities, and later interregional trade, approaches that were considered integral parts of the marketing whole. The paradigm shift of the 1950s brought about a proliferation of new schools: marketing management; marketing systems; consumer behaviour; macromarketing; exchange; and marketing history. As the discipline fragmented most schools have developed a life of their own as scholars narrowly focus within their own specialty without regard to other schools or their integration into a unified whole (Bartels, 1988). Despite the impressive accumulation of knowledge within particular schools during the past 100 years, the status of marketing thought taken as a whole appears in more disarray at the beginning of the 21st century than at the beginning of the 20th century.

And yet, the schools are complementary; therefore early and modern schools may be linked together in at least a rudimentary framework. The marketing functions school identifies the work performed in channels of distribution between firms and firms and firms and households. The commodity approach categorizes products and services as the objects of market exchange. The institutional school describes the types and behavior of marketing middlemen (exchange specialists), standing between original producers and final consumers in channels, which in the aggregate provides the institutional context of the marketing system. Marketing management deals with the work of an individual firm in creating profitable sales of products and services. Consumer behavior includes an individual household's search and selection activities in purchasing assortments of products and services for consumption. The interregional and marketing history schools relate the spatial and temporal aspects of marketing activities, describing places where and occasions when market exchanges occur on a micro scale between individual segments of supply and demand up to the macro scale of aggregate supply and demand. Macromarketing concerns the bi-directional impacts of marketing as an institution with the social system. Marketing systems provides a hierarchical superstructure to integrate firms and households working toward achieving some of their goals through the process of creating stable market transactions and transvections within the institutional channel structure of the aggregate marketing system and the sanctions of society. The exchange school provides a hub linking the elements of the marketing system together in a whole: firms and households as actors playing selling and buying roles directed toward creating market transactions and transvections, linking the objects, locations and occasions for exchange within the institutional channel setting, nested within the aggregate marketing system, which in turn interchanges with other institutions of the total social system. Of course, the more difficult task is formalizing the conceptual linkages among the schools of marketing; a task for future research.

But first there is a more fundamental problem for marketing thought. Unfortunately, much of the useful knowledge gained in the paradigm shift of the 1950s is obscured by the vague and general nature of the paradigm broadening of the 1970s. Although it may not appear quite so alarming when viewed within a single school, taken together, the broadened paradigm in three schools (marketing management, consumer behavior and exchange) subsume all social interactions, relationships and exchanges among humans, thereby obscuring the subset of human social activity uniquely related to the marketing system.

The marketing management school, originally dealing with how a business firm targeted customer segments with a marketing mix (i.e. the seller side of the market equation), has broadened to include almost any social or personal cause using marketing mix-like persuasive communication techniques. The consumer behavior school, originally emphasizing how want satisfying products and services were purchased (i.e. the buyer side of market exchanges), has broadened to include virtually all aspects of obtaining and using anything whether market related or not. The exchange school, originally focusing on sellers and buyers engaged in market transactions and transvections, has broadened to include any parties giving and receiving anything in a generic exchange relationship irrespective of roles, motives or values. That is, the clear and concise construct of a market transaction has been replaced by the ambiguous and encrusted notion of generic exchange. Thus, at the beginning of the 21st century, the identity, distinctive subject matter, and boundaries of marketing as a discipline are vague and ambiguous.

The expansion of these three major schools beyond the business domain leaves marketing thought at a crossroads. This is a particularly crucial juncture because the marketing management and consumer behavior schools include the overwhelming majority of marketing researchers, and the exchange school represents the commonly acknowledged core subject matter for a general theory of marketing. Unfortunately, this bifurcation problem is confounded by not being recognized. ‘Being the dominant world view’, the broadened paradigm Arndt (1983: 52) astutely observed, ‘tends to remain unquestioned and assumes the status of being real and routine’. Consequently, the vast majority of researchers focusing within a particular school are unaware or unappreciative of the criticality of boundaries for marketing thought as a whole. Therefore the fundamental problem at the crossroads is a choice between the unquestioned answer: to continue broadening marketing without asking if it is logical to do so, or to deal with the unanswered question: is it more rational for marketing to return to its institutional boundaries?

It will be recalled that Commons (1924), Breyer (1934), and Alderson (1965) emphasized that marketing involves more than merely trading or bartering of one thing for another; marketing is an integral societal institution in which the actors play well defined social roles – seller and buyer, have clearly delineated motives – profitability and utility/benefit, and have precisely stated values – expressed in monetary terms. Generic exchange based on the murky and excessive notion of all exchanges by any parties with any motives for any values appears as a huge step backward from the construct of a market transaction, which clearly and lucidly specifies the parties, motives and values. The importance of this distinction cannot be overstated. Going back in history, philosophers and scholars from Plato (427–348 BCE) to Alderson (1965) have examined the significant distinction between trading based on mere barter agreements, commonly found among primitive tribes and less developed countries, compared with market transactions as a cornerstone of trade in an advanced civilization, such as 5th century Athens or 21st century America (Shaw, 1995).

The fundamental difficulty with broadening marketing/generic exchange is that except for a few isolated hermits, human behavior is inherently social, and social behavior includes all human roles and exchange relationships. Marketing management techniques can be applied to political campaigns, religious organizations, social or personal causes without broadening the conceptual domain of marketing to contain political science, theology, sociology and social psychology. Marketing research uses statistical techniques, but is not part of, nor does it claim, the discipline of statistics. Application of practical techniques should not be confounded with disciplinary conceptual domain. Broadened marketing/generic exchange includes: teacher and student exchanging ideas, fighters exchanging blows, boy and girl exchanging kisses, or mother and child exchanging feelings of affection. These are not outlandish examples; the concept of 'intimate marketing', for instance, was proposed to include marital and family exchange relationships (Levy and Zaltman, 1975: 42). What is the benefit? As discussed previously, broadly defining everyone with something to gain as a marketer has brought greater respectability to marketing practitioners. Broadened marketing also provides some interesting practical applications of marketing techniques. But the benefits are not without costs.

The main cost is the loss of identity, vagueness of subject matter and lack of disciplinary boundaries. 'By broadening its horizons through the concepts of exchange of value and taking broader social perspectives, marketing is beginning to blur its boundaries', and Sheth and Gardner (1982: 220) concluded this broadening should be reversed, 'before the crisis of identity threatens the existence of marketing'. Several scholars also note the first axiom (Bartels, 1988) or criteria for a science of marketing requires that it 'must have a distinct subject matter' (Hunt, 2002: 20). Thus, broadening the discipline and generic exchange obfuscates marketing's unique identity, calling into question its status as a social science.

Moreover, the generic exchange concept already exits in another social science, where it more appropriately bounds its subject matter. Sociologist George Homans (1950, 1958), for example, recognized there were costs and benefits in the interaction between and among individuals and groups and defined social exchange using a business analogy: 'profit = reward – cost'. It is clear that social behavior contains the set of all marketing behavior, but does the reverse obtain: does marketing behavior contain the set of all social behavior? Is a person saying 'hello' in exchange for another individual's 'hi' engaged in marketing or social activity? Holbrook's (1987) observation about broadening consumer behavior is easily extended to broadened marketing/generic exchange: by attempting to encompass virtually everything, marketing represents almost nothing.

How far can generic exchange be broadened? The answer is ad infinitum. The earliest sages of ancient Greek philosophy conceptually searched for the primordial element of nature causing harmony in the cosmos. Heracleitus (c540–475 BCE) concluded the fundamental element was fire (for reasons that need not detain us, except to note his metaphorical use of market exchange). Since retailing had recently been introduced to Greece by the Lydians and was spreading like wildfire (Jones and Shaw, 2002), Heracleitus employed a marketing metaphor: 'There is an exchange: all things for fire and fire for all things, like goods for money and money for goods.' Humans not only exchange with each other, but also provide care in exchange for affection or work from pets and domesticated animals. And people also exchange with their physical environment, such as in sowing and reaping. Indeed, everything in the universe consists of matter and energy in a continuous process of exchange. Are all interchanges in the universe market exchanges? If not, is all human behavior directed toward social exchanges marketing? If not, academics should draw a boundary to clearly identify marketing's distinct subject matter. If not, marketing is just 'blowing in the wind'.

After a quarter of a century, broadened marketing's legacy is many practical applications but few if any theoretical implications. It has confused the subject matter and boundaries of marketing, and generic exchange has even been used in other social sciences. This research argues it is time for the discipline to question the paradigm broadening and reconsider the conventional business domain as the conceptual foundation for contemporary marketing thought.

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