

EDITORIAL

Modern pioneers in marketing: autobiographical sketches by leading scholars

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Abstract

Purpose – This paper aims to introduce a special issue of the *Journal of Historical Research in Marketing* which includes autobiographical sketches by leading scholars in the history of marketing and consumer research.

Design/methodology/approach – A brief review of the (auto)biographical tradition in marketing scholarship leads to a commentary on the four accounts in this issue.

Findings – Highlights of the four portraits are presented and insights into their authors' lives and careers are offered.

Originality/value – The authors hope this introductory article whets readers' appetites to learn more about the four contributors whose careers and personal lives are explicated for their consumption.

Keywords History of marketing thought, Consumer research, Russell Belk, Philip Kotler, Sidney Levy, Morris Holbrook

Paper type Editorial

Introduction

The Scottish philosopher Thomas Carlyle is credited with writing “the history of the world is but the biography of great men”. As many readers of this *Journal* will appreciate, great women have also played an important role in the development of marketing theory, thought and practice (Tadajewski and Maclaran, 2013). To tell history is to tell the stories of those involved and in this issue, we present the autobiographical narratives of four major figures in the history of marketing and consumer research. Each has made substantive contributions to their respective topical areas.

Kotler (2017) has provided us with various landmark textbooks as well as theoretical, conceptual and axiological advances. Sidney Levy's attention to the empirical world and interdisciplinary orientation has generated key insights into branding and fostered sociologically and anthropologically sensitive consumer research. Russell Belk is a publishing machine, producing a very large number of manuscripts and videos which deal with all facets of the world of consumption. Courtesy of the stimulus offered by Levy, the support of scholars like Harold Kassarian and his own interests beyond the mainstream, he was a passionate advocate for the promotion of interpretive consumer research. Morris Holbrook, in equal measure, deserves a huge amount of respect for his forwarding of interpretive, emotional and aesthetically focused consumer research. Indeed, Holbrook's



contributions are perhaps the most difficult to summarize succinctly: they range across multiple paradigms from more mainstream research to some of the most contentious methodological approaches available today. Taken together, all four authors have helped shape the world of academic marketing and consumer research. They deserve our attention and considerable respect.

We are naturally interested in the lives, peculiarities and successes of other people. The autobiographical sketches in this and the next issue of *JHRM* help satisfy those needs and curiosities. In addition to being thought-provoking in their own right, such self-portraits are also useful because they help us to understand their authors' contributions to marketing thought. They enable us to appreciate the origins and development of significant ideas as well as the context and influences on those ideas.

There is a long tradition of publishing biographical and autobiographical work in marketing. The *Journal of Marketing* featured a series of 23 short biographies of "pioneers in marketing" from 1956 through to 1962. That collection was focused on early marketing academics and segued into the "Leaders in Marketing" series that was published until 1974. The latter included 49 subjects, mostly professors but also some notable practitioners. Wright (1989) alleged that the then-editor of the *Journal of Marketing*, Edward Cundiff, terminated the "Leaders" series because of a lack of appreciation of the value of biography.

Whatever the reason for this disinclination to pay appropriate respect to those who published and practiced before us, there are many other sources of (auto)biographical writing in our discipline and we have seen a resurgence of interest in the past decade or so. Many of the articles appearing in the *Journal of Marketing* were later reprinted in Wright and Dimsdale (1974) and more recently in Tadjewski and Jones (2008). Other valuable sources include Converse's (1959) *The Beginning of Marketing Thought in the USA with Reminiscences of Some Pioneer Marketing Scholars*. This fascinating text included 26 short biographical accounts. And, of course, Bartels' (1962) seminal book on the history of marketing thought included 17 biographical notes. Later editions (Bartels, 1976, 1988) added to that tally. What is perhaps odd is that in his doctoral dissertation (Bartels, 1941) on which that book was based, Bartels included an appendix with some 40 biographical narratives all more detailed than those ultimately published in his famous tome. And Bartels himself was profiled in a paper by Shaw and Tamlia (2001). One of the greatest marketing thinkers of the twentieth century, Wroe Alderson, has been the subject of various biographically oriented reflections (Wooliscroft, 2006; Halbert, 2006; Shapiro, 2006). So, marketing historians have created a relatively large body of (auto)biographical work (see also Jones, 2012, Appendix 1.1).

As regular readers will know, the *JHRM* has extensively contributed to this stream of literature. The very first issue was dedicated to Hollander (2009) and included a republication of his autobiographical account, as well as several other biographical notes about Hollander. More recently, Baker (2013), Lazer (2013) and Shapiro (2013) have reflected on their personal and work-lives. Beyond this eminent group, studies published in *JHRM* have explored the contributions of a diverse range of influential scholars and practitioners, including pieces on David D. Monieson (Jones *et al.*, 2010), William R. Davidson (Jones, 2013a; Sweeney, 2013; Tamlia, 2013), Pauline Arnold (Jones, 2013b), Caroline Robinson Jones (Davies, 2013) and Elizabeth Hoyt (Parsons, 2013). In 2011, a special issue (volume 3, issue 1) honoured Donald F. Dixon. It included nine biographically inflected articles. To press this point home a little, there are many more articles than we have space to list which have focused in a biographical way on various aspects of the careers of remarkable people associated with our discipline (Tadjewski, 2013). In this issue, and at least one more to follow, we carry on this rich tradition.

As mentioned above, we have been fortunate to secure contributions from some of the luminaries of marketing and consumer research for this special issue (and a subsequent issue later this year). Rather than simply provide summaries of each paper, it might be more interesting to draw out common threads as well as points of divergence from our authors' accounts.

Family

Reading across each of the contributions, there are a certain number of common themes. Each of them readily underscores their appreciation for the support and help that their families – especially their wives – have provided over the course of their lifetimes. This assistance has been extremely valuable. Our familial and social networks are key in facilitating high levels of productivity whilst retaining our sanity in the face of the trials and tribulations of life. And there have been some trials and tribulations in the lives of the scholars featured in the pages of this issue. Although he only gestures to it in his manuscript, Sidney Levy has reflected upon his personal life in much greater detail in other places and his narrative will strike an emotional chord in all but the hardest-hearted reader (Levy, 2016). While touching upon very different issues to Levy's recall of unexpected early bereavement, Holbrook's (2017) paper traces the double edge of family power relations, highlighting that our personal relationships are not entirely unproblematic. They can shape us and not in a positive fashion sometimes.

Hard work and idea generation

Hard work has been the order of the day across the board. Levy's and Kotler's consummate skill in negotiating the worlds of academia and consulting practice must have exacted considerable opportunity costs as well as providing fertile sources of inspiration for idea generation and eventual publications. Naturally, scholarly activity is often a function of exposure to a body of literature and the generation of new insights – whether conceptual, theoretical, methodological or empirical – requires a fair amount of systematic application (Belk, 2014, 2017; Ladik, *et al.*, 2015). In Holbrook's case, he also discusses the considerable room for serendipity and luck in academic labour, stressing a role for letting our minds wander as we go about our daily routines. For both Belk and Holbrook, allowing our minds to drift is as important as concerted application when trying to stimulate new ideas. Unusually out of the cohort presented here, Holbrook gestures to the fact that some of his research reflected his own physiology and visual difficulties. These were influential factors driving his approach to scholarship and the selection of some research topics.

More pragmatically, Levy's research on brand image was derived from consulting experiences with Social Research Incorporated (SRI). Moreover, his ideas about the broadening of marketing were sparked by a nudge from his Dean at Northwestern University who wanted to expand student numbers. Combined with his activities at SRI which had sensitized him to the notion that marketing was undertaken by a range of organizations, many of whom were not traditional for-profit enterprises, Levy articulated marketing as a practice which could be applied in non-profit and charitable contexts. This, he believed, more accurately reflected empirical reality than assuming marketing was only useful for the generation of profit in traditional business firms.

There were benefits from this domain expansion. Obviously, student numbers could potentially be increased by making the case that marketing was practiced by all organizations. Recalling the tumultuous period in which this argument was expressed, it seems clear that it enabled universities to target the cohort of students who would otherwise have eschewed marketing as an adjunct to the military-industrial-establishment (Kassarjian, 1995). For those already involved in marketing practice or working as

academics, it provided them with legitimation. Those awkward dinner party conversations which run along the lines of a Bill Hicks sketch could now be defused by passionate claims about marketing's contributions to wider society.

For Levy, there was little point denying that marketing practice was already broadened. By negating it, intellectual myopia constrained the market for marketing teachings. Interestingly, he underlines that his broadening thesis was not normative. Even so, his description of the empirical reality that he had witnessed via work with SRI and the publication event of the 1969 *Journal of Marketing* paper did provide further ammunition for the ideological expansion of marketing's role in society that we have witnessed via social marketing, Transformative Consumer Research and related forms of activism (Tadajewski *et al.*, 2014). While the application of marketing-related principles in non-business contexts does have an historical lineage prior to Levy's research, it is reasonable to say that Kotler and Levy brought it to prominence within the walls of the ivory tower.

Kotler, of course, is famous for his pathbreaking axiological and conceptual contributions authored with Levy and Zaltman, among others. But he is most well-known for the varied textbooks he has produced over the past half-century. His extensive training in various disciplines served him well in this regard, enabling him to traverse multiple fields and use them as a prism to advance marketing theory, pedagogy and practice. Undertaking these large-scale intellectual exercises must have been taxing in their formative period. Now, of course, Kotler is a veritable industry in his own right, a major brand that has served to help roll out a specific vision of marketing throughout the world, including, as he found out by chance, the former Soviet Union (Fox *et al.*, 2008). Out of our authors, Kotler is – we cannot resist mentioning – the only one who has been honored with a postage stamp celebrating his birthday.

The theme of hard work continues in Belk's paper. Belk's early morning routine, commitment to constantly expanding his intellectual horizons and extensive engagement with a very large pool of co-authors are combined with a level of interest in his subject that is truly impressive. He is an exemplar of the commitment and tenacity needed to be an academic star. The humility he exhibits makes his account even more fascinating. He and Holbrook are standouts for their modesty (Levy is a little more willing to stress his intellect and Kotler repeatedly underlines that his teachers were Nobel Prize winners. In addition, he references his large number of honorary degrees and his competitiveness with prominent economists). Both stress their "very ordinariness" (Belk, 2017) and "modest ability" (Holbrook, 2017). Belk points out that he often does not feel like the smartest cookie in the room when attending seminars or other events. This statement is not a cause for cynicism. It does not read like false modesty.

Belk puts in long hours thinking and writing. He has a great memory for citations, is a fastidious record keeper, has a structured approach for remaining up-to-date with the literature and regularly attends interdisciplinary conferences that expose him to alternative bodies of scholarship. What the neophyte and established academic alike should take from Belk's autobiographical sketch – among other things – is his approach to publishing. This is not a scholar with a sense of entitlement. The same can be said of all our contributors (this is a personal reflection – we've had experience of dealing with all of them in various contexts). However, before we continue with our discussion of Belk's work and style of scholarship, it is worth pausing to appreciate another common theme. This one revolves around the issue of the politics of knowledge production in marketing and consumer research.

The politics of knowledge production

In some of the manuscripts in this special issue, we get a clear insight into the politics of knowledge production in marketing. As has been detailed elsewhere, the marketplace of ideas is not necessarily a bastion of objectivity, neutrality and collegiality (Tadajewski, 2008, 2016). We do not have complete freedom to pursue lines of inquiry that pique our attention. Part of this is a function of doctoral training. As Holbrook and Belk document, initially they were inducted into the positivistic and information processing paradigms, although this exposure was less oppressive than it could have been. Holbrook earned his intellectual stripes working under the seminal John Howard. The latter's influence was strong, but not uncritically absorbed (Holbrook, 2015).

As we might expect, initially Howard's rational, cognitive, information processing view shaped Holbrook's writing, but cracks in this edifice appeared, leading him to absorb alternative philosophical and methodological perspectives. At the same time, however, Holbrook was still producing an impressive range of publications that sat close to the paradigmatic, conceptual and methodological mainstream, even if the topics were progressively expanding the reach of marketing and consumption theory. This tempered, but still transgressive, ethos threads throughout Holbrook's oeuvre. His association with Beth Hirschman, another seminal contributor to our discipline, accelerated his critical stance. And working together, they negotiated a fine line in criticizing the paradigmatic, epistemological and managerial focus of marketing scholarship, appreciating the relative freedom that consumer research as a specialism offered.

What we should point out is that there is a figure in Holbrook's narrative that deserves considerable kudos for helping expand the boundaries of marketing and consumer research. We are referring to Harold – Hal – Kassarian (a former editor of the *Journal of Consumer Research* and a highly respected and exceptionally well institutionally networked figure). He was significant in helping Holbrook push marketing towards semiological research and applications. But his influence extends far beyond this. As Belk (2014) has accentuated, Kassarian was a supporter and advocate for the Consumer Behavior Odyssey; another pivotal event in the paradigmatic broadening of consumer research.

Intriguingly, Holbrook is a little circumspect about how far we can push the boundaries of our academic labour. He does thank the various supporters who have enabled his more critically oriented work (e.g. journal editors). Likewise, he is generous in acknowledging the role his colleagues, students and co-authors have played in enabling him to push the frontiers of knowledge. Clearly, he has moved beyond the traditional boundaries – paradigmatic, methodological and topical – of our discipline in a way that relatively few others would attempt. Promoting subjective personal introspection and stereographic research was a higher-risk project than we might expect from a scholar embedded at a prominent US institution.

Holbrook's actual research practice, that is the way he sought to negotiate disciplinary conventions, certainly has much to teach us about how we can ensure that marketing remains a dynamic discipline, cleaving space for our own contributions. He is extremely aware of the need to rigorously justify all deviations from the received view, often by arguing that new perspectives – whether we are talking about the importance of fantasies and feelings or any other issue he has explored – supplement rather than completely undermine extant research. This kind of partly deferential, partly transgressive ethos was a common strategy in the late 1970s to early 1980s, when various disciplines were seeking to displace positivistic and functionalist approaches as the only way to undertake research.

Put differently, Holbrook expands what counts as a contribution to marketing and consumer research without violating the assumption grounds of the potential readers of his

work to a problematic extent. Partly, this was possible because his shifts in topics, concepts and methodologies were slow and steady. And there were specific conditions of possibility that enabled Holbrook to undertake his research endeavours. Kotler and Levy's broadening movement partly justified Holbrook's interpretive, aesthetic and emotion-oriented research. They provided the legitimation he needed, enabling him to situate his work within the discipline, rather than it being consigned to the rejection bin through the types of gestures that have historically been invoked to delegitimize interpretive and Consumer Culture Theoretic research (Tadajewski, 2008). Furthermore, some of his avant-garde research was encouraged by the activities of the Odyssey.

Not wholly dissimilar trajectories to Holbrook's are found in Belk's autobiography. He was fortunate to have a PhD supervisor who encouraged him to engage in less mainstream research. Notably, Belk is quick to state that he does not like toeing the line demanded by authority figures. This antipathy to authority, combined with his own intellectual curiosity and the methodological needs of his research, helps explain his willingness to shift paradigms. Indeed, he encourages us all "to take a chance and dare to do something different" (Belk, 2017). This risk-taking propensity has yielded dividends for Belk and our discipline. Without it, we might not have witnessed the Consumer Behavior Odyssey and the stimulus it provided for post-positivist research. But, let us be clear once more, the visibility of the Odyssey was not mere chance. There were enabling conditions facilitating the promotion of alternative paradigmatic perspectives. After all, Belk was in a privileged position to promote the outputs of this exercise as the Association for Consumer Research president. Irrespective of these opportunities, the marketing of interpretive research has not been straightforward. New perspectives are often met with challenges from dominant paradigms. Yet, by taking the middle-ground between logical empiricist research and interpretive scholarship as we know it today by drawing upon quite positivistic validation criteria (Belk, 2014), Belk and colleagues were able to cement a place for this research strategy (Shankar and Patterson, 2001).

Clearly, Belk publishes a great deal and this, he writes, means he receives quite a lot of rejection letters. Probably, he avers, more than most academics. This could make us all a little disenchanted. Not Belk. What we liked about his reflections in this regard is that when he gets rejected, he does not take this as the starting point for a power-laden interaction with an editor, seeking to get them to reconsider their decision. He takes it as a cue to improve his own work, to strengthen his contribution and to begin the submission process anew. This is something we should all take on board.

For those just beginning their careers or struggling to maintain enthusiasm due to research pressures, Belk's affirmative statement towards the end of his paper about the publishing process – that is the actual researching and writing – becoming easier with practice should be interpreted as a call for us all to persevere in the face of adversity (or the white, empty screen of Word). Like Levy and Kotler, Belk does not see retirement on the horizon. May we all retain the interest and motivation that his autobiography reveals in vivid terms. If we can all stay as active and involved with academic work in our 95th year, like Levy, then we'll all be doing very well (provided this is a choice and not just a reflection of an ongoing economic fallout courtesy of Trump and Brexit).

Beyond the book

The scholars in this issue maintain their energy and vitality through wide reading. For some, their academic strategy is slightly more focused than others. Kotler underscores his attention to four main disciplines when writing his textbooks. Levy repeatedly refers to his curiosity and productivity being derived from a manifold range of disciplines (Levy, 2016). The reader

might wonder whether they do anything but work. Do these people have lives beyond the pages of the articles and books they produce? The short answer is yes; they have active lives beyond their publications. Kotler, Levy and Belk have been and continue to be avid travellers, seeking exposure to alternative cultures and marketplaces. This, in turn, feeds into their work. Holbrook devotes less attention to travel in the external sense. Like [Levy \(2012\)](#), he has been an active participant in psychoanalysis, seeking to learn about himself, the generative psychological forces that shape who he is, how he thinks and how he engages with the world of consumption.

Reading Holbrook's paper, we can readily appreciate why travelling was not so much of a feature of his working life as the other contributors. He was supremely focused on research and publication. Towards the end of his article, he remarks that he now has ample free time to enjoy the fiction that his hectic work commitments precluded for many years. Of course, we should point out that if people are familiar with Holbrook's writing, especially his subjective personal introspections, then they will recall that he does enjoy travelling internally around the USA to his various homes. In the revelatory fashion that his autobiographical paper truly embodies, Holbrook has previously allowed readers to literally peer into his homes and cupboards. With his contribution to this issue, he continues this openness by providing the reader with an account that illuminates his contributions, personal history, insecurities and the fantastic depths of his knowledge about and engagement with Jazz.

To conclude this introductory article, what we take from the papers in this special issue is that while there are some similarities in terms of how these academics have approached their work, there are many differences as well. The rich tapestry of their accounts, their hard work, their commitment and the way they have – in some cases – overcome difficult periods in their lives, all remind us that there is no one path through life. Certainly, it won't in many cases be a straight, easy and always enjoyable experience. But that is what makes us who we are.

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