

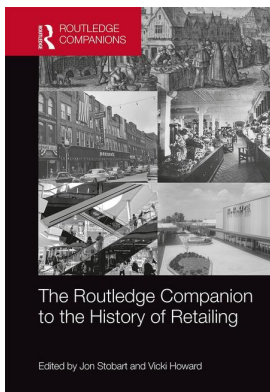
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RETAIL MANAGEMENT

Martin Purvis

Introduction

All retailers, no matter where and when they traded, and on whatever basis and scale, will have had managerial decisions to make; about the location of their business, how best to obtain and manage stock, what to sell and at what price, what forms of payment to accept, how to keep costs in check and how to record receipts and expenses. Nor were such decisions simply a function of routine trading. Many retailers would have reflected more strategically on whether and how to expand their business; by selling new lines, by greater promotional activity, by employing more staff, and by investing capital in larger or additional premises. Only latterly, and chiefly in bigger businesses, have such decisions become the preserve of senior staff specifically identified as managers, working within an organisational structure which distanced them from the shop floor. At other times, as remains true for many small retailers today, the full range of managerial responsibilities has been assumed by a single proprietor, or by an owning family, still closely involved in everyday trading.

Yet, for all its importance in ensuring that goods flow efficiently from producers to consumers, retail management has rarely been subjected to sustained historical investigation. Despite Chandler's (1977, 1990) example, retailing receives short shrift in most mainstream business and management histories. Nor have calls for closer connections between studies of past and present been widely answered by researchers interested in contemporary retail management (Alexander 2016; Savitt 1989). Retail historians, meanwhile, have frequently focused on the outcomes of managers' decisions – evident in the development of new forms and formats, and the rise and fall of specific businesses – rather than exploring managerial structures and decision-making processes. Only gradually has such work begun to engage with wider arguments about the implications of management for organisational performance (Alexander 2015). Retail history is, moreover, partial in its coverage; paying disproportionate attention to individual larger businesses. Company histories and biographies of leading retailers are also inconsistent in quality. Some are rich in empirical detail; but too many are uncritical and formulaic, offering few managerial insights. Given the limited documentation of past practice, especially for smaller family-owned businesses, redressing the balance is not easy.

Yet not all is gloom. We can draw on a rich literature which, whilst often chiefly concerned with other matters, illuminates aspects of managerial practice and the evolution of management

structures in retailing. As noted this literature reveals most about the workings of the large-scale retail businesses of the modern era, which frequently grew beyond the managerial capabilities of any single individual. It is thus amongst department stores and multiple retailers that we often find the clearest evidence of managerial innovation, of the complexity of change as an experimental and contested process, and of the impact of management decision-making on business performance. Much of the following discussion focuses, therefore, on retailers' responses to the challenges of managing at scale, and of co-ordinating increasingly large and spatially dispersed branch networks, during the century between 1850 and 1950.

We cannot, however, assume that major stores have always maintained the highest managerial standards, or that effective retail management has ever been confined to such operations. The demise of familiar brands since the financial crash of 2008 confirms that even substantial retailers can be undermined by inadequate, inflexible or complacent management. Equally important is that we recognise the part played in modern retailing by a multitude of smaller shopkeepers. Although often dismissed as laggards, independent retailers sometimes displayed managerial skills that rivalled their larger counterparts. Indeed, their ideas and methods arguably exerted a greater influence than is generally acknowledged upon the "revolutionary" forms of large-scale retailing that developed from the nineteenth century onwards. This chapter thus attends initially to retail management amongst independent businesses, before turning to department and chain store development. In so doing it considers not only the ways in which key aspects of retail management evolved between the eighteenth and the mid-twentieth centuries, but also why such change appeared necessary and how it was enacted. Geographically, greatest attention is paid to Western Europe and North America, but discussion of the transmission of ideas between particular national contexts will take us further afield.

Managing on a small scale – independent retailers

Small-scale retailing has generally been characterised by organisational simplicity, with managerial functions being discharged by a single owner, or owning family. Indeed, small business structures often echoed those of the family; with proprietors exercising "parental" supervision over the work of relatives, and of apprentices and other paid employees, who sometimes formed part of the retailer's household. In other respects, however, the differing levels of competence exhibited by individual shopkeepers, the variety of circumstances in which they operated and the wide range of trades involved, make it difficult to discern common managerial characteristics. Before the advent of industrialised mass production, retailers were often judged as much for their knowledge of the products which they sold, and for their skills in producing and processing their own merchandise, as they were for more abstract understanding of business organisation. Perhaps partly as a result, efforts to characterise independent retailers often imply only a limited interest in the finer points of retail management, or in the pursuit of managerial innovation.

At times and places when independent shopkeepers have been most numerous – particularly in the expanding urban settlements of nineteenth- and twentieth-century Europe and North America – only a minority made more than a marginal living. Retailing presented few entry barriers, so that small ventures were frequently started by individuals with little or no capital, education or commercial experience. Success was represented by the establishment of an enduring business, even if this entailed long working hours and the exploitation of family labour. But reports from Britain, Germany and the United States indicate that thousands of shopkeepers failed every year; defeated not just by growing competition, but also by their own flawed understanding of purchasing, stock control, account keeping and credit management (Douglas 1935; Strasser 1989). Such naivety was rarer amongst more substantial independent retailers. But the

competent management of routine business which apparently characterised this latter group has often been taken as confirmation of the innate conservatism of established family firms. The proprietors of such businesses – including the Banbury shopkeepers studied by Stacey (1960) – are portrayed as risk averse, disdainful of modern business methods, unwilling to countenance expansion that would erode their personal proprietorial control and ultimately more concerned with preserving their social status than with maximising profits.

Whilst claims about the limitations of shopkeepers' managerial and entrepreneurial abilities are often justified, they cannot be taken as a judgement upon all independent retailers (Phillips and Alexander 2005; Spellman 2016). A minority of individuals – blessed with greater ability, ambition and good fortune than their neighbours – created substantial businesses. Indeed, the origins of many department and chain stores can be traced to a single modest shop. Nor was independent retailers' ability to confound predictions of their demise entirely a product of inertia, or of the legal protection afforded by some governments. Successful shopkeepers may have exhibited little formal understanding of managerial principles, but experience and knowledge of the community which they served provided invaluable insights into which items their customers would demand most frequently, the prices they could afford to pay, how best to present goods and the creditworthiness of potential purchasers (de Grazia 2005; Spiekermann 2006). Such knowledge, moreover, was applied not just to maintaining a store's existing business, but also to developing new lines and services, even if only on a modest scale. These are aspects of retailing about which we know frustratingly little, largely because of the lack of documentary evidence. Recent research has, however, drawn on sources including diaries, account books, advertising and trade publications to reveal something of shopkeepers' practices in specific contexts. As the following sections discuss, such work confirms the managerial sophistication of some independent retailers; both in pioneering ways of working that were subsequently more fully developed by others, and in adapting the methods of larger businesses for their own purposes.

Foreshadowing retail revolution

Our knowledge of retailers' methods in eighteenth- and early nineteenth-century England chiefly reflects the practices of relatively prosperous traders selling higher-order goods in major urban centres. These individuals doubtless exhibited a degree of managerial ability and a capacity for innovation that were rare amongst contemporaries. But some practices first identified amongst metropolitan traders have also been detected in humbler provincial contexts (Stobart and Hann 2004; Walsh 1995). Even if they were atypical these progressive retailers provide valuable evidence of the emergence of recognisably modern commercial practice (Walsh 1999). Taking advantage of the decay of legal and customary constraints upon retailing, and spurred on by an associated increase in competition, many displayed 'enterprise and adaptability' both in day-to-day business and in expanding their trading activities (Cox 2000, p. 227).

Such enterprise is evident in the unusually full surviving records of provincial shopkeepers William Stout of Lancaster and Abraham Dent of Kirkby Stephen in Westmorland; both of whom developed complex and geographically extensive networks of suppliers so as to secure a wide range of goods at advantageous prices (Stobart 2012). Contacts were also cultivated as sources of intelligence about changing fashions, new goods and the wider state of trade. Progressive retailers, particularly in trades such as drapery and footwear, were equally active in marketing their wares to potential purchasers; investing in shop fittings and lighting, and developing window displays (Riello 2006; Walsh 1995). Shopkeepers also attended to the internal organisation of their stores; as a direct contribution to increased operational efficiency and as a means of conveying their managerial skills to customers. The creation of structured

systems for the storage and display of goods allowed retailers to demonstrate the range of their stock, minimise losses caused by damage or contamination, and improve customer service by ensuring that items could be readily located. Indeed, some larger eighteenth-century businesses found it advantageous to organise their premises as a series of separate areas dealing with particular categories of goods, each with their own specialist staff. Such traders foreshadowed the organisational practices of later department stores in other ways. Fixed prices and cash-only sales speeded up transactions and reduced the need for close proprietorial supervision. It thus became easier to delegate routine transactions to employees and apprentices, whether within a single store, or – as was true of emergent footwear chains trading in Regency London and provincial centres including Brighton, Bath, Norwich and Liverpool – in branch outlets (Riello 2006).

Little of this would have been possible without careful bookkeeping and attention to financial management; whether in respect of supplier payments, customer credit or receipts for goods sold. Standards in such matters must have varied enormously. But mathematics and basic accountancy formed part of the education received by more substantial English tradesmen from at least the sixteenth century onwards. Indeed, it was in this field that some of the earliest commercial textbooks were produced to disseminate good practice, including double-entry bookkeeping. Business success was thus, in part, a product of what later centuries would formalise as management training, communicated between the generations in trading families, between masters and apprentices, but also through instruction manuals. The most famous of these books, Daniel Defoe's *The Complete English Tradesman*, with its comments on shop location and design, the importance of civility to customers, managing credit and bookkeeping, was thus a prototype for many retail management textbooks (Cox 2000; Stobart 2012).

Rising to the competitive challenge

If eighteenth-century shopkeepers pioneered modern retail methods, a focus on the later nineteenth and early twentieth centuries reveals independent retailers' ability to respond positively to challenging circumstances. Efforts to ensure their own survival in competitive markets led shopkeepers to explore ways to increase operational efficiency, boost sales and reduce costs. In some contexts, moreover, shopkeepers abandoned their traditional individualism to cooperate with other retailers – locally and nationally – and with manufacturers and suppliers. Independent retailers were potentially enthusiastic adopters of new technologies, provided that they appeared relevant and affordable. Automatic cash registers, produced in the United States from the 1880s onwards, were one such technology, promising an immediate check on the competence and honesty of sales staff, and greater ease and accuracy in account keeping. Indeed, it was independent shopkeepers, rather than large-scale retailers, who made greatest initial use of cash registers and whose experience contributed to the technology's refinement (Spellman 2016). At the same time, in both Europe and the United States, the trade press and technical manuals offered shopkeepers practical advice about other ways to boost their business, including innovations in advertising and display, modernisation of their premises and reorganisation of store layouts (Alexander et al. 1999; Cochoy 2010).

Independent traders were thus exposed to arguments for a rational approach to retailing which paralleled developments, explored below, in department and chain store management. But documentary limitations frustrate efforts to gauge the extent to which shopkeepers' outlook and methods changed in practice. Particular proposals – including self-service, which increasingly featured in advice to American grocers during the mid-twentieth century (Cochoy 2016; Deutsch 2010) – represented too decisive a break with tradition for some retailers to countenance. Nor did those who saw the commercial logic of new methods always possess the financial

and organisational means to implement them. Even relatively modest changes probably spread slowly and selectively, at least initially. Work on the take-up of cash registers, using manufacturers' sales records, confirms that early adopters were a tiny minority of all shopkeepers in the United States (Spellman 2016). Aggressive marketing, especially by the National Cash Register Company, extended demand to Western Europe, Latin America, Australia, New Zealand, South Africa and Japan by the 1900s. But annual sales in specific national contexts rarely numbered more than a few hundred (Haberstroh 2013). Germany proved a receptive market; but even here barely half of all retail establishment had a cash register by the 1920s. Indeed, only a quarter of German retailers reportedly kept regular accounts; a situation mirrored in Britain and the United States (de Grazia 2005; Douglas 1935; Tedlow 1990).

Technical and managerial innovation by individual shopkeepers was, however, reinforced by strategic alliances with other retailers, wholesalers and manufacturers. Initially such operations were often defensive, aiming to curb competition and price cutting. But joint initiatives developed in ways that contributed positively to retail modernisation. In interwar Britain some local trade associations collaborated with Art Schools and Technical Colleges to provide instruction in window dressing and display; others coordinated joint advertising and promotional initiatives. The latter included shopping festivals, intended not just as a stimulus to trade, but also as an encouragement to shopkeepers to raise service standards and to invest in modernising their premises. Efforts to replicate the vertical integration and scale economies achieved by larger retailers, through joint purchasing of stock and requisites such as wrapping paper did not, however, flourish in Britain. By contrast Germany, with its traditional regard for the *Mittelstand*, proved fertile territory for co-operative purchasing amongst independent retailers. Local ventures established during the late nineteenth century subsequently combined to create national associations. Two of the largest such co-operatives, Edeka (founded in 1907) and Rewe (established in 1926) were still substantial forces in German grocery retailing when converted into corporate entities in the 1980s (Wortmann 2004). Retailer purchasing co-operatives also took root in the United States from the 1880s onwards, particularly in the drug and grocery trades.

Alternative joint-buying initiatives were promoted by wholesalers keen to protect their own sales. In their most developed form these operations created voluntary symbol groups which involved independent shopkeepers in identifying with a common brand. The implications of membership for retail management extended beyond the central contractual relationship between retailer and supplier. Shopkeepers surrendered some of their independence as they were expected not only to make a minimum weekly stock purchase, but also to uphold common service standards and to display group signage. In some instances members were required to purchase equipment supplied by the group, or to submit trading figures in a prescribed fashion. In return, however, they gained access to centrally provided services, including advertising and publicity material, insurance, managerial training and advice about business modernisation. The influence of voluntary symbol groups was greatest in the United States, where operations such as Royal Blue Stores and the Independent Grocers Alliance emerged in the 1920s; and in parts of continental Europe, particularly the Netherlands, where groups including SPAR expanded rapidly from the 1930s (Deutsch 2010; Jefferys and Knee 1962). By contrast, such organisations did not take off in Britain until the 1950s. They were eclipsed little more than a decade later by the rise of the supermarket, and the spread of cash and carry wholesaling as a more flexible means of reducing independent retailers' costs (Fulop 1962). However, some of the functions which voluntary groups provided elsewhere, in particular the modernisation of publicity and display, and a willingness to supply small retailers at competitive prices, were partially fulfilled by major manufacturers.

Managing on a large scale – department stores

If growing competition created managerial challenges for independent shopkeepers, the development of large-scale retailing produced its own distinctive difficulties. The department stores which emerged in nineteenth-century Europe and North America, and subsequently spread elsewhere, were retail businesses on a scale that had few precedents. Their appeal reflected, in large part, the diversity of goods sold at affordable prices. Commercial success therefore required contacts with multiple suppliers; the search for volume at competitive prices often leading to direct dealing with producers. The department store's business model also demanded fast stock turnover. Operational systems had thus to be capable of handling a large volume of business; and of working effectively at speed when dealing with the transfer of physical goods, and associated flows of orders, invoices and payments. Store premises, too, were substantial; encompassing not only spaces for selling, but also for the production, inspection, pricing and storage of goods, for mail-order trading, for financial and administrative functions and for staff facilities, sometimes including residential accommodation (Iarocci 2014; Whitaker 2011). Such businesses became major employers. By the early 1920s, Macy's of New York had 12,000 permanent employees, whilst Bresee's, a small-town store in upstate New York, had nearly 200 on its payroll (Graham 2000; Howard 2008). This increasing scale and complexity of operations prompted managerial innovation.

In practice the growth of individual businesses was often incremental. Many major stores had modest origins; as wholesale dealers which started selling on a retail basis, or as drapers which added lines in jewellery, fancy goods and furniture. Expansion, moreover, often reflected an opportunistic search for new business, rather than pursuit of a grand strategy (Miller 1981). Managerial developments tended to have a similarly experimental and evolutionary character. At times stores drew inspiration from other large organisations, including railways and the military. But there were also important continuities with the managerial ethos of the family firm, not least in the importance of store founders and their heirs as the public face of the business – projecting an image variously as commercial visionary, showman and paternalist – and as the ultimate, even dictatorial, authority sanctioning all key decisions (Belisle 2011; Miller 1981). In some smaller department stores, such as Bresee's in upstate New York and Power's of Montana, individual proprietors retained direct control over routine operations, as well as strategic decision-making (Klassen 1992; Howard 2008). But expansion usually required the recruitment of additional managerial expertise, at senior levels and throughout the store. Responsibilities within this hierarchy were defined by the individual's place in an increasingly formal division of stores into sub-units or departments, each with their own management team.

The origins of the departmental model are unclear and, as previously noted, probably predate the department store *per se*. The model was, however, applied at least as early as the 1840s by growing stores such as A. T. Stewart of New York, creating an organisational structure that arguably would 'have looked efficient even by modern standards' (Resseguie 1965, p. 314). Some departments dealt with functions, including financial record-keeping and store maintenance, which served the business as a whole. But at Stewarts, as elsewhere, the operation's core was constituted by a series of merchandising departments specialising in particular lines of goods. Each was headed by a buyer, responsible not only for sourcing goods from suppliers, but also for setting retail prices and all aspects of selling. Buyers' powers did not usually extend to staff recruitment, which was handled centrally by the store superintendent; but they were frequently influential in determining the staffing levels and personnel of their own departments (Benson 1986). Considerable authority was thus conferred on buyers; reflecting a belief that business success was dependent on skilled buying of fashionable and keenly priced goods by individuals with

specialist knowledge of their own particular lines of trade. Selling, by comparison, was regarded as a secondary function.

The managerial model which came to be associated with the late-nineteenth-century department store was something of a hybrid in terms of the relationships which it fostered. As stores expanded they became bureaucratic and impersonal workplaces. Operational efficiency was seen to require a clear, if increasingly complex, division of labour. Alongside sales staff, stores employed a growing body of other workers, including window dressers, stock controllers, cashiers, bookkeepers, seamstresses, packers, cleaners, maintenance engineers and delivery drivers. Effort was invested in standardising and documenting the tasks that each would perform. Indeed, workers were increasingly judged on the basis of their conformity with these norms, which often extended to matters of personal appearance and morality. Application and efficiency, especially amongst sales staff, were encouraged by linking reward to performance. Commission on sales was a necessary supplement to low basic pay, and longer-term loyalty was fostered by systems of internal promotion to supervisory and managerial positions. By contrast, even trivial misdemeanours – including, at Macy's of New York, unauthorised sitting and talking – could prompt instant dismissal. This emphasis on discipline and conformity was, however, tempered by efforts to refashion the personal bonds between employer and employee which characterised smaller family firms. Institutionalised paternalism – evident in subsidised meals, health, educational and leisure programmes, staff benevolent funds and celebratory social events – encouraged staff to identify themselves as part of an extended family constituted by the store and its owners (Benson 1986; Miller 1981).

Stores were also structural hybrids, combining centralised direction of functions including personnel management and financial accounting with significant autonomy for individual merchandising departments. It was a model which initially secured success, but which contained the seeds of later tensions. The identification of buyers as temperamental and authoritarian figures is a recurring theme in writings about department stores. Inter-departmental relations, moreover, were often unhealthily competitive, with buyers prioritising the interests of their own fiefdom over those of the wider store (Benson 1986). The operation of stores as a fractious collection of quasi-autonomous units was widely tolerated on both sides of the Atlantic – including Macy's of New York and Bon Marché of Paris – whilst sales and profits continued to grow. Some stores, indeed, leased out particular departments to other specialist retailers (Perkins and Freedman 1999). It was thus understood that units with store-wide functions were intended chiefly to relieve buyers of burdensome distractions, rather than to constrain their activities. Even financial accounting had a relatively lowly status in most nineteenth-century department stores as an exercise in routine record keeping.

Proprietors and senior managers, keen to ensure that popular merchandise was always available, but without accumulating costly stock surpluses, attempted some control over buyers. This usually entailed setting limits to individual buyer's spending or, in the case of John Wanamaker of Philadelphia, restricting external advertising to goods deemed worthy of carrying the store's name (Perkins and Freedman 1999). Despite internal opposition, the distance between some American stores and metropolitan suppliers also encouraged them to depute buying duties to resident agents in New York and Chicago. But proprietors generally lacked both the means and inclination to subject buyers' performance to closer scrutiny. Store-wide costs were frequently allocated to merchandise departments in proportion to their sales, without regard to their specific origins. Stock-taking, meanwhile, was a laborious and infrequent process which did little to inform future planning, or to highlight poor purchasing by buyers (Walsh and Jeacle 2003). This managerial ethos changed only slowly even in stores which, like Bon Marché of Paris, were by the 1880s compiling statistics for sales and other indicators of departmental performance (Miller

1981). Senior figures perhaps understood the potential managerial value of such information, but few felt the need for greater intervention.

Experiments in “scientific” management

Attitudes would, however, change later in the nineteenth century as major stores struggled to sustain their growth. Initially this encouraged greater attention to selling; prompting innovation such as the bargain basement, popularised by Filene’s of Boston, and a modest redistribution of authority from departmental buyers to the store superintendent responsible for staffing. Often the superintendent acquired an enhanced status as the head of a newly constituted team of floorwalkers who supervised the daily work of departmental sales staff. Intended to reinforce customer service standards, such developments risked creating organisational confusion. Lines of authority were blurred as sales staff appeared answerable to two superiors, often falling foul of antagonism between buyers and floorwalkers. More substantial reforms were thus required to enable department stores to respond to increased retail competition, the effects of suburbanisation and transport improvements and wider economic volatility.

As governments and manufacturing industry were drawn to the writings of Frederick W. Taylor and other advocates of workplace planning and rationalisation, so leading retailers also came to see a solution to their own difficulties in “scientific” management (Jacobs 2007). Such thinking was not entirely new; department stores were early adopters of technological innovations – including telephones, escalators and pneumatic cash transfer systems – which promised to increase the speed and efficiency of particular tasks. Moreover, some individual businesses had previously used sales and stock holding records to inform purchasing decisions. Marshall Field’s wholesaling division in Chicago began working in this way in the 1870s, and its methods perhaps spread to its customer stores in smaller American cities (Twyman 1954). Former Marshall Field employee Gordon Selfridge implemented a similar system when establishing his own London store in 1909, in turn influencing Harrods and other British retailers (Scott and Walker 2012). In Germany, meanwhile, Salman Schocken of Kaufhaus Schocken independently devised an organisational structure which employed a central statistical office to monitor income and expenditure, and to support managerial decision-making (Lerner 2015). Only gradually, however, did such experiments come to be accepted as normal working practice. Research into the rationalisation of retail management was published at least as early as the 1900s. But even in the United States, where such thinking originated, change in retail practice became widespread only during the interwar years (Walsh and Jeacle 2003). Thus, Graham (2000, p. 285) identifies Lillian Gilbreth’s work with Macy’s between 1925 and 1928 as the first close collaboration between a store and a ‘bona fide scientific management consultant’. Such initiatives were encouraged by the depression of the early 1920s; declining retail profits being widely, if often unfairly, attributed to poor purchasing by departmental buyers. Efforts to eliminate waste and promote efficiency thus assumed an increasing importance.

Much of Gilbreth’s work with Macy’s focused on efforts to increase the economy with which individual workers executed routine tasks. Macy’s own staff subsequently applied similar principles to store planning; recording, for example, customer movement patterns to identify optimum locations for particular sales departments, lifts and elevators. In Paris, meanwhile, Galeries Lafayette first engaged with scientific management in an effort to rationalise the operations of an associated clothing plant (Champsaur and Cailluet 2010). The wider application of “science” to retailing, however, had particular implications for the role and status of departmental buyers. Reliance on their individual judgement about stock gave way to a conviction that purchasing must be informed by systematic analyses of past sales and research into consumers’

tastes and preferences. Only in this way, advocates of scientific management claimed, could retailers ensure that their stores would always be full of the goods which their customers wanted to buy, in exactly the right mixture of styles, sizes and colours. Informed purchasing and developments such as the model stock plan – promoted by Boston store proprietor Edward Filene as a means to streamline stocks by focusing on the fastest selling and most profitable items – promised not only to maximise sales, but also to reduce costs by making it easier to order goods in bulk, minimising the capital locked up in accumulated stock, and reducing the need to discount slow-selling merchandise (Savitt 1999).

Crucially, this new perspective identified the store as a whole as the primary operational unit. Evolving ideas about managerial structures were captured in a series of interwar publications. In particular, the ideas of Paul Mazur (1927) – an American retailer turned banker and consultant – became a model for department store organisation. Although stores still appeared to their customers as a series of product-based departments, Mazur outlined a managerial structure which grouped activity across the entire operation into four functional divisions: merchandising (buying and selling goods); communications (advertising, display, promotional activities); store management (personnel, stock storage and inventory control, customer deliveries, maintenance); and a controlling division responsible for financial accounting (see Figure 16.1). The size and importance of their workforce subsequently led many stores to identify personnel management as a separate division. But this refinement does not alter the main implication of Mazur's work; authority would henceforth be wielded by those individuals who headed the major store-wide divisions.

Mazur's model promised greater rationality in internal organisation, reducing costs, eliminating duplication, and placing key functions under the supervision of senior specialists. In practice it did not always enable stores fully to achieve these goals; tensions often remained between buying and selling staff within newly established merchandising departments (Wood 2011). But the reformed structure addressed the primary concerns of proprietors and senior managers. Buyers with product expertise and supplier contacts remained important figures, but increasingly they worked to execute store-wide purchasing strategies defined by merchandise managers. Central control of staff recruitment, training and retention was also confirmed. Equally significant was the emphasis placed on the collection and analysis of financial information about all aspects of store operations; as a means of reviewing current performance and to inform future planning. Employees were increasingly judged on the extent of their contribution to growing store revenues, or reducing operational costs. Regular sales and profits reviews also became a vital means of maintaining the discipline which stores sought to impose on buyers. New accounting techniques were thus important managerial tools. In particular, the retail price method of inventory control allowed a constant check to be kept on stock levels, and the ready identification of losses due to theft or the discounting of surplus stock (Savitt 1999; Walsh and Jeacle 2003). The interwar years thus saw the elevation of the financial controller, or company accountant, to a prominent role in store management.

Scientific management did not claim to increase sales and profits only by enabling stores to make informed stocking decisions. A similar logic was applied to the allocation of store staff and floor space, aiming to focus resources on the fastest selling and most profitable merchandise. In parallel, the emergent science of psychology promised greater understanding of what motivated customers to buy and how sales staff could encourage purchasing (Chessel 1999). Salesmanship training therefore sought not only to improve product knowledge and service standards, but also to teach staff to recognise supposed customer types, each of which required handling in particular ways to maximise sales. Engagement with psychology extended to staff recruitment with the aim of identifying individuals with the greatest aptitude for particular tasks. This was often allied to wider efforts to promote a more positive labour regime, emphasising staff retention and

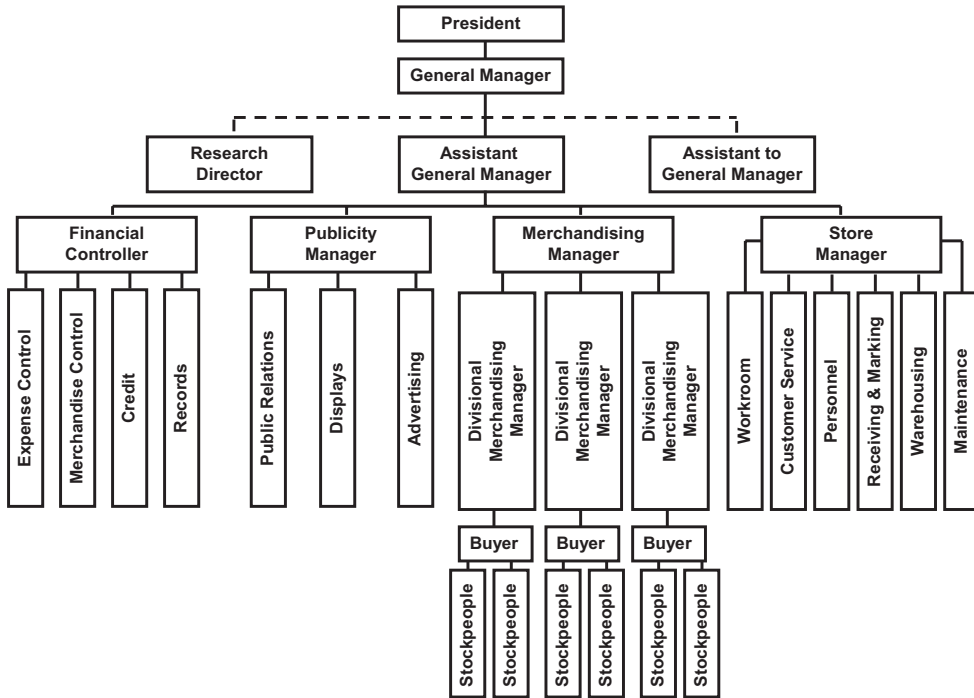


Figure 16.1 Mazur's Organisational Plan for Department Store Management

Source: Adapted from P. Mazur, *Principles of Organisation Applied to Modern Retailing*. New York NY: Harper, 1927.

welfare. Analyses of work routines thus promised not just efficiency, but also an improved working environment, greater job satisfaction and reduced staff fatigue (Graham 2000). In parallel, training and internal communications grew in importance as a means of encouraging identification with the business. Stores established staff magazine; including Filene's of Boston (*The Echo*), individual branches of the Hudson's Bay Company (*The Bay Builder*, *The Bayonet and The Beaver*) and Brown, Muff of Bradford (*The Beam*) (Miller 2006). Scientific management thus reinforced the logic of established forms of institutionalised paternalism, whilst rendering them more systematic (Miller 1981). Additional resources were invested in health care, pensions, sick pay, sports and social facilities and paid holidays; whilst in the 1900s Shepard's of Providence and Filene's of Boston were amongst the earliest stores to appoint managerial staff with specific welfare responsibilities. A minority of businesses, including John Lewis of London, went further by instituting employee profit-sharing (Cox 2010). But pay scales generally became more regular, promotion processes more transparent and discipline less arbitrary (Belisle 2007; Benson 1986).

From America to the world

Retailing's embrace of scientific management was initially an American phenomenon, pioneered by stores including Macy's of New York and Filene's of Boston. Senior business figures not only refined their own operations, but also encouraged efforts to identify and disseminate managerial best practice. Major stores sponsored the creation of departments of commerce and business as centres for research and teaching at American universities, including Harvard and

New York (Leach 1993). Edward Filene also helped to create groupings amongst stores themselves, including the National Retail Dry Goods Association (founded in 1911) and the Retail Research Association (dating from 1917), aiming to foster interest in scientific management and to collect data to inform continuing investigation.

Recent research has helped to trace the spread of efforts to promote scientific management from North America to Europe, Japan, Australia and New Zealand (de Grazia 2005; Roberts 2003). Although little was published elsewhere during the interwar decades, American writings on “scientific” retailing were read increasingly widely. A German translation of Mazur’s work on store management was, for example, published in 1928. Training manuals and other documents created by stores themselves also circulated internationally; the collection amassed by the personnel manager of the David Jones store of Sydney, Australia included material from the United States, Canada and Britain (Miller 2006). At the same time leading department stores in other national contexts began to strengthen their own institutional links. British stores, for example, established the Retail Distributors Association in 1920. By the early 1930s the Association was co-operating with the London School of Economics to produce an annual survey of store operating costs similar to the pioneering analysis undertaken by the Harvard Bureau of Business Research (Scott and Walker 2012).

Evidently, too, the interwar years saw a growth in direct international exchanges between leading industry figures. Store owners and senior managers from Europe, Japan, Australia, New Zealand and elsewhere visited the United States to study developments firsthand (Champsaur and Cailluet 2010; Maeda 1998; Roberts 2003). Trans-Atlantic links, along with British and Swedish influences, were also important in the development of France’s first retail training school, under the aegis of the Paris Chamber of Commerce (Chessel 1999). Edward Filene, meanwhile, was an ardent internationalist; in politics as well as commerce. He visited Europe frequently, developing extensive personal and professional links with department store owners; and championing institutions such as the International Chamber of Commerce. In the late 1920s, Filene’s own philanthropic foundation supported Emile Bernheim, of *L’Innovation* department store in Brussels, in his efforts to establish what would become the International Association of Department Stores (IADS). Unlike many international projects the IADS was not wrecked by the deteriorating economic and political climate. Meetings and exchanges of statistical information were supplemented by a system of critical store visits which aimed to provide member firms with comprehensive advice about potential operational improvements (Pasdermadjian 1950).

Yet whilst the general pattern of contacts is relatively well-known, understanding of the spread of particular ideas and innovations remains partial. Few of the individuals or organisations involved in early efforts to render retail management scientific have been the focus of sustained or recent research. Pasdermadjian’s (1950) history of the IADS is dated and reveals more about the principles of scientific management than it does about the Association’s impact on store management. In Britain work using data collected by the Retail Distributors Association has shed new light on the economics of department store trading, challenging claims that stores failed to match the efficiency gains made elsewhere (Scott and Walker 2012). But in most cases we still know little about how such gains were achieved, the specific influences which inspired them, or the degree to which it was necessary to adapt internationally circulating ideas to reflect specific local circumstances.

There are, however, good reasons to think that change during the interwar years was neither swift nor universal. Whilst IADS membership was multinational – including representatives from France, Belgium, the Netherlands, Britain, Sweden, Denmark, Germany, Italy and Spain – it never exceeded ten stores. The Association’s impact was, therefore, limited beyond

a self-selecting retail elite (Champsaur and Cailluet 2010; de Grazia 2005). Stores, moreover, were not equally willing to share commercially sensitive information through such organisations. Communication constraints may thus partly explain why techniques such as the retail price method of inventory control were not always implemented effectively when first introduced into new national contexts (Jeacle and Walsh 2008). Even in the United States, smaller stores such as Bresee's in New York State changed their managerial structures and practices only slowly; not necessarily because senior staff were unaware of new thinking, but because they questioned its relevance for their own business (Howard 2008). Indeed, such a stance was arguably logical, given evidence of the problems created for the Hudson's Bay Company in Canada when scientific management principles were applied without regard for local market conditions (Monod 1986). Restructuring of the managerial hierarchy was also a source of tensions within retail businesses. Store controllers' assertion of their new authority was sometimes accompanied by attacks on the competence and honesty of departmental buyers. Buyers, in turn, resented their subordination, so that companies' efforts to implement new accounting and stock control systems could turn into long-running battles (Benson 1986; Jeacle and Walsh 2008).

Labour and gender historians also offer an important critical appraisal of the motivations for, and impacts of, new approaches to personnel management. Such work challenges accounts of welfarism as evidence of employer benevolence that appear in company histories. Instead a picture emerges which emphasises managerial self-interest; the desire to create a more docile and efficient workforce, to deflect external criticism of previous labour practices and the associated threat of state regulation, and to obstruct the spread of trade unionism. Welfare policies may also have exacerbated gender inequalities. This was not just because a predominantly male management became a paternalistic provider of benefits to a dependent and increasingly female workforce. Male and female employees were often treated differently, with women being exposed to a welfare regime which was arguably infantilising in stressing their need for protection (Belisle 2007). Whilst recreation and training for men focused on career development, provision for women placed greater emphasis on promoting middle-class notions of social respectability and their future roles as wives and mothers. This is not, however, to imply uncritical acceptance of these values by employees, despite their enthusiasm for the associated benefits. Sometimes, as was true of Australian stores studied by Reekie (1987), workers asserted their own control over provision such as convalescent funds. More generally, staff magazines were used to express employees' frustration about the regulation of their working lives. Workers also challenged managerial expectations about conduct by establishing their own collective standards. Although individual studies disagree about the extent of such behaviour, practices such as deliberate inattention to customers and theft of goods from the store sometimes assumed significance as forms of resistance to managerial control (Belisle 2007; Benson 1986).

Managing at a distance – multiple retailing

Early twentieth-century interest in the application of "science" to retail management was not confined to department stores. Leading multiple retailers were equally enthusiastic advocates of intelligent purchasing, rigorous stock control, planned allocation of store space and staff, cost monitoring, and innovations in personnel management (Purvis 2015). Again, ideas pioneered in the United States found their way to Europe and elsewhere. In part this reflected the overseas expansion of American retail capital; Woolworth's, for example, exported its five-and-dime store model to Britain (from 1909) and Germany (from 1927) (Godley 2003). A decade under American ownership also prompted improvements in stock control and the supervision of local store managers at Boots, Britain's largest retail chemist (Chapman 1974). But European retailers

were increasingly active in emulating the formats and managerial methods of popular American stores. This was evident in the interwar transformation of Marks and Spencer from an ailing former penny bazaar into a successful variety store chain. But the fixed-price format was also taken up more widely across Europe, not least by existing department stores in Germany, France, Belgium and Italy, concerned that they would otherwise be excluded from emerging mass markets (Furlough 1993). A similar story can be told about the later trans-Atlantic journey of self-service retailing in the grocery trade, and its managerial implications both at company level and in the individual store (Schröter 2008; Shaw et al. 2004).

Growth and the logic of centralisation

All manifestations of multiple retailing, however, posed distinctive managerial challenges as businesses considered how best to coordinate the operation of growing, and increasingly geographically dispersed, branch networks. The individual department stores already discussed were, of course, sometimes part of retail chains, created by mergers or the expansion of city-centre stores into secondary shopping districts. But these were often loose alliances, each outlet retaining its own independence. Multiple retailing, by contrast, usually involves significant managerial centralisation; with decisions about the location, funding and design of stores, operating practices, retail pricing, advertising and promotion, financial accounting and, especially, stock acquisition, being taken at the company's headquarters (Alexander 1997; Tedlow 1990). Indeed, centralisation is frequently seen as vital to multiple retailing's success, given its role in creating a coherent operation with a strong brand identity; in fostering relative organisational simplicity based on procedures common to all stores; and in securing economies of scale and scope, not just in sourcing stock, but also in business administration and store construction (Perkins and Freedman 1999).

In practice, however, the logic of centralisation was tempered by other considerations. Too great a degree of uniformity risked demoralising staff and alienating customers by creating stores which appeared impersonal, and insensitive to consumers' varying tastes and financial means. Growth might, moreover, create a business so large and complex that it could not be directed effectively by a single owner, or central management team. In the early 1900s, Jesse Boot could still claim personal knowledge of branches throughout his 300-strong chain of chemist's shops, located in some 150 English towns. But administrative lapses increased over the following decade as Boot aged, whilst store numbers increased by 50% (Chapman 1974). The managerial challenge presented by multiple retailing varied with the commercial and geographical scale of specific businesses. Multiples operating on a local or regional basis, and selling a limited range of basic goods, might be dealing with an essentially homogeneous market that could be served by centrally controlled clone stores. The same was less likely to be true of businesses selling individually more expensive items or fashion goods, and of retailers who aspired to trade nationally or internationally. But, large or small, most multiples faced questions about the distribution of decision-making power between company headquarters, individual branches and any intermediate layers of management. The difficulty which companies experienced in determining the most appropriate managerial balance between these various levels is an important theme in Chandler's (1977, 1990) work on corporate structures. Subsequent research, although uneven in its coverage, has explored the ways in which businesses addressed these issues, and the impact of particular geographical contexts, market conditions, company histories and individual personalities on their decision-making.

The multiple retailers which emerged in Western Europe and North America in the late nineteenth century varied in their origins. Some, some including the British footwear chain

Stead and Simpson, were established by consumer goods producers as outlets for their products, and were thus initially managed as divisions of what were essentially manufacturing companies. Others grew out of earlier franchising systems, as producers, including the Singer Sewing Machine Company, sought greater control over retail sales. Many consumer co-operatives also represented a form of multiple retailing, distinctive both in the collective ownership of the business by its customers and the consequent potential for conflict over a society's direction between paid managers and elected representatives of the consumer members (Wilson et al. 2013). Most multiple retailers, however, traced their origins back to a single store owned by the company's founding family.

Initial branch development was often limited, sporadic and localised. Family members and trusted assistants were installed as managers of the new stores, working under close proprietorial supervision (Raucher 1991). The American retailer J.C. Penney was distinctive in adopting a model of co-ownership in which new store managers became partners in the business, helping to fund expansion in return for a share of the profits. But here, too, new men were accepted only at the personal discretion of Penney and his lieutenant E.C. Sams (Curry 1993). Success, however, encouraged Penney's to attempt large-scale expansion. Such growth required outside investment, whilst also making it difficult for any individual to maintain direct control over the entire branch network. It was at this point, therefore, that many family businesses were formally incorporated. For Penney's, which made the move in 1913, this entailed the reconstitution of a loosely articulated series of overlapping partnerships into a single corporation. At the same time proprietors drew on the experience of family members and other allies to develop a more substantial and organised company head office (Kruger 2012; Bookbinder 1993 explores a similar phase in Marks and Spencer's development). Such offices would become populated by specialist staff with expertise in areas including buying, product development and testing, transport and logistics, advertising and display, property acquisition and finance. With store-level management no longer in the hands of the proprietor's close confidants, multiple retailers also invested effort in standardising branch operations. Store managers and their staff were thus expected to abide by systems of rules and regulations akin to those which governed department store operations (Raucher 1991).

The task of ensuring that individual branches maintained expected service and performance standards was frequently devolved to a new group of experienced staff who functioned as intermediaries between company headquarters and local stores. These inspectors or superintendents usually oversaw territorially defined districts, paying regular visits to the stores under their supervision. As well as monitoring the conduct of routine business and advising managers about store improvements, inspectors also communicated orders and information from head office throughout the branch network, and ensured the return flow of trading reports. At best this was a recipe for decisive, if somewhat dictatorial, management, fostering consistent standards and driving continued expansion. But, as the following section details, companies suffered as their commercial development exposed the limitations of established operating practices and managerial structures.

Searching for new structures

By the interwar years some multiple chains, particularly in the United States, had become too large and geographically dispersed to be managed effectively from a single head office. Rather than countenance unauthorised operational variations by individual store managers, companies opted for planned decentralisation. The Great Atlantic and Pacific Tea Company (A&P), which by the mid-1920s operated over 14,000 grocery stores across the United States, was amongst

the first to review its structure. From 1925, greater managerial responsibility was devolved to six operating divisions, each accountable for around 2,500 stores, and charged with ensuring that day-to-day trading was tailored to local market conditions. Yet the internal distribution of power remained strongly in favour of a head office dominated by A&P's owners, the Hartford brothers. Divisional managers were expected to uphold company policy on stocking, pricing and advertising, and to defer to head office in matters including the establishment or improvement of stores. The consequent mismatch between the distribution of responsibility and power would become a focus of discontent within the company (Walsh 1986).

Sears Roebuck, too, experienced protracted managerial uncertainty during the interwar years (Chandler 1990). The company's concentration of buying and all other major management functions in Chicago – reflecting its origins as a mail-order retailer – proved increasingly problematic during the later 1920s as Sears reacted to competition by establishing a national chain of over 300 stores selling furniture, electrical appliances and other consumer durables. This development strained the capacity of the company's existing systems. But it also raised questions which the central management team was ill-equipped to answer; about branch location, manager recruitment and the selection of goods to reflect local demand. Efforts to resolve these difficulties led to extended experimentation with alternative management structures. Decentralisation during the early 1930s proved abortive as ambiguity regarding the respective powers of the company's financial, merchandise and operational managers in Chicago and new tiers of regional management responsible for the branch network created conflict and duplication of effort. A brief return to centralisation was followed by an attempt to devolve much greater responsibility to individual store managers. It was not, therefore, until the 1940s that Sears implemented an enduring solution which saw full multi-functional authority transferred to five new territorial divisions. Under this devolved model the centre played a largely advisory and strategic role; decisions about store development and operation, including inventory, sales promotion, financial management, personnel, and maintenance were taken at territorial level. The structure preserved the ultimate logic of multiple retailing as all stock was still ordered through the merchandise department in Chicago. However, territorial and store managers gained the freedom to devise stocking plans and pricing strategies that were appropriate for their particular markets.

The example of Sears Roebuck reveals the difficulties which businesses faced in responding to managerial challenges unmatched in the previous experience of most retail executives. Indeed, Chandler (1990) advances the wider claim that companies tend to make significant changes in managerial structures only when forced to do so by serious threats to their development strategy. Chandler's study also highlights the role of specific individuals in promoting, or obstructing, change. In particular, he identifies the importance of Sears' long-serving President, Robert E. Wood, as the originator of the new retail strategy, but also as someone whose tendency to value the personal abilities of individual managers over the development of systematic management structures complicated the company's search for a solution to its problems. The greater degree of centralisation maintained throughout this period by Sears's leading competitor, Montgomery Ward, can similarly be linked to the autocratic tendencies of its CEO, Sewall Avery.

Other examples confirm that there was no singular solution to the challenge of managing at a distance. As Woolworth's developed its British operations from 1909 onwards it retained the divisional structure which characterised its American parent, with district offices in Liverpool, Birmingham and London (Seaton 2009). The same model was not, however, adopted by their British rival Marks and Spencer which, although it employed district store inspectors, continued to stress direct contact between head office and branch managers. But Marks and Spencer's

evolution from penny bazaar to variety retailer saw increasing emphasis placed on the experience of store managers, who were charged with ensuring that their own outlet carried stock which reflected the specifics of local demand, and with supplying sales intelligence to inform purchasing by the company's central buyers. Managers who failed to show the expected judgement and application were just as likely to be reprimanded by head office as those who appeared too independent (Purvis 2015).

Such diversity survived into the postwar era. As Alexander's (2015) study of British grocery chains Tesco and Sainsbury confirms, the histories and circumstances of particular companies, and the personalities and prejudices of their individual leaders continued to shape management structures. Only with the development from the 1980s onwards of computerised systems that allow real-time monitoring of sales and automatically generate stock replenishment instructions has there been a general shift towards close centralised control over the operations of individual stores. Yet studies of today's supermarket chains suggest that store managers value the limited freedoms which they retain in matters of stocking and product promotion (Fuller et al. 2009). Some, indeed, seem to seek ways to subvert, at least symbolically, centralised corporate control. Experimentation and contestation have not entirely receded into managerial history.

Conclusion

Across retailing as a whole there has always been greater variety in managerial systems and competencies – from the ordered to the chaotic; the collaborative to the dictatorial; the simple to the complex – than any brief survey can convey. The functioning of particular businesses, both large and small, has often reflected the personalities of individual owners and managers. Retail development from the eighteenth century onwards has, however, posed a series of common managerial challenges. For the independent retailer such challenges were largely a reflection of growing competition, which hastened the end of some businesses, whilst encouraging others to emulate the efficiencies and scale economies that underpinned the success of department and chain stores. But the growing scale of retail operations created its own difficulties, which often saw direct proprietorial control give way to an increasingly complicated managerial hierarchy, populated by individuals responsible for particular functions within a large store, or for the performance of specific stores within an extensive network. The division of major businesses into components that could be comprehended by individual managers solved one set of problems, but often created others; not least regarding communications, and the balance to be struck between the centralisation and devolution of decision-making power. Attempts to promote organisational efficiency and coherence led many large retailers to place faith in performance data, and associated technologies for its acquisition and analysis. Most also sought to redefine relationships between managers and shop floor staff, through the formal codification of working practices and the creation of systems of pay and rewards intended to foster company loyalty. Such managerial changes were, however, often adopted in a piecemeal fashion. The application of “science” to retail management was, initially at least, a rather hesitant process, sometimes resisted by vested interests.

So much is clear from the growing body of research on retail history. But, as noted at the outset, much of this work is the product of a primary concern with the evolution of retail systems and the history of particular businesses. More systematic study is therefore required of the managerial systems which underpinned the development of modern retailing; perhaps particularly to illuminate the part played by the multitude of currently anonymous managers in the establishment of retail chains and department stores.

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