Proceedings

MACROMARKETING
CONFERENCE 2019

June 26-29
Cleveland, Ohio, U.S.A.

Theme: Mobilizing Action to Catalyze Real rocking Outcomes

Doctoral Colloquium: June 25-26

CONFERENCE CO-CHAIRS
Tina Facca-Miess
Ann-Marie Kennedy
Nicholas Santos
<table>
<thead>
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<th>Track</th>
<th>Chairs</th>
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<tr>
<td>Anti-consumption as a mobilizing catalyst</td>
<td>Lucie Ozanne</td>
<td><a href="mailto:lucie.ozanne@canterbury.ac.nz">lucie.ozanne@canterbury.ac.nz</a></td>
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<tr>
<td></td>
<td>Mike Lee</td>
<td><a href="mailto:msw.lee@auckland.ac.nz">msw.lee@auckland.ac.nz</a></td>
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<tr>
<td>Consumer Vulnerability</td>
<td>Teresa Pavia</td>
<td><a href="mailto:teresa.pavia@business.utah.edu">teresa.pavia@business.utah.edu</a></td>
</tr>
<tr>
<td></td>
<td>Terri Rittenburg</td>
<td><a href="mailto:TRitt@uwyo.edu">TRitt@uwyo.edu</a></td>
</tr>
<tr>
<td>Ethics, Equity and Social Justice</td>
<td>Joya Kemper</td>
<td><a href="mailto:j.kemper@auckland.ac.nz">j.kemper@auckland.ac.nz</a></td>
</tr>
<tr>
<td></td>
<td>Cathy McGouran</td>
<td><a href="mailto:C.Mcgouran@liverpool.ac.uk">C.Mcgouran@liverpool.ac.uk</a></td>
</tr>
<tr>
<td></td>
<td>Ann-Marie Kennedy</td>
<td><a href="mailto:ann-marie.kennedy@canterbury.ac.nz">ann-marie.kennedy@canterbury.ac.nz</a></td>
</tr>
<tr>
<td></td>
<td>Nicky Santos</td>
<td><a href="mailto:nicholas.santos@marquette.edu">nicholas.santos@marquette.edu</a></td>
</tr>
<tr>
<td>Food Marketing</td>
<td>Claudia Dumitrescu</td>
<td><a href="mailto:Claudia.Dumitrescu@cwu.edu">Claudia.Dumitrescu@cwu.edu</a></td>
</tr>
<tr>
<td></td>
<td>Renée Shaw Hughner</td>
<td><a href="mailto:renee.shaw@asu.edu">renee.shaw@asu.edu</a></td>
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<tr>
<td>Gender across the Spectrums: Intersectionalities and Macromarketing Topics</td>
<td>Laurel Steinfeld</td>
<td><a href="mailto:lsteinfield@bentley.edu">lsteinfield@bentley.edu</a></td>
</tr>
<tr>
<td></td>
<td>Wendy Hein</td>
<td><a href="mailto:w.hein@bbk.ac.uk">w.hein@bbk.ac.uk</a></td>
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<tr>
<td>Globalisation, (Neo)Colonialism, and Marketing</td>
<td>Olga Kravets</td>
<td><a href="mailto:Olga.Kravets@rhul.ac.uk">Olga.Kravets@rhul.ac.uk</a></td>
</tr>
<tr>
<td></td>
<td>Marcus Wilcox</td>
<td><a href="mailto:marcus.hemais@iag.puc-rio.br">marcus.hemais@iag.puc-rio.br</a></td>
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<tr>
<td>Macromarketing and Climate Change</td>
<td>Sabrina V. Helm</td>
<td><a href="mailto:helm@email.arizona.edu">helm@email.arizona.edu</a></td>
</tr>
<tr>
<td>Macromarketing and Pedagogy</td>
<td>Stan Shapiro</td>
<td><a href="mailto:sshapiro@sfu.ca">sshapiro@sfu.ca</a></td>
</tr>
<tr>
<td></td>
<td>June Francis</td>
<td><a href="mailto:jfrancis@sfu.ca">jfrancis@sfu.ca</a></td>
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<td>Topic</td>
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<tr>
<td>Macromarketing Measurement and Methods</td>
<td>Ben Wooliscroft, Francisco Conejo</td>
<td><a href="mailto:ben.wooliscroft@otago.ac.nz">ben.wooliscroft@otago.ac.nz</a></td>
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<tr>
<td>Markets, Marketing Systems, and Elements of Culture</td>
<td>Ingrid Becker, Michaela Haase</td>
<td><a href="mailto:ingrid.becker@fau.de">ingrid.becker@fau.de</a>, <a href="mailto:michaela.haase@fu-berlin.de">michaela.haase@fu-berlin.de</a></td>
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<tr>
<td>Poverty, Structural Inequalities and social exclusion</td>
<td>Pia Polsa, Olga Kravets</td>
<td><a href="mailto:pia.polsa@hanken.fi">pia.polsa@hanken.fi</a>, <a href="mailto:Olga.Kravets@rhul.ac.uk">Olga.Kravets@rhul.ac.uk</a></td>
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<tr>
<td>Quality of Life and Wellbeing</td>
<td>Alexandra Ganglmair-Wooliscroft, Ahmet Ekici</td>
<td><a href="mailto:alexandra.ganglmair@otago.ac.nz">alexandra.ganglmair@otago.ac.nz</a>, <a href="mailto:ekici@bilkent.edu.tr">ekici@bilkent.edu.tr</a></td>
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<tr>
<td>Social marketing – How to Rock and Roll Social Change</td>
<td>Christine Domegan, Josephine Previte, Ann-Marie Kennedy</td>
<td><a href="mailto:christine.domegan@nuigalway.ie">christine.domegan@nuigalway.ie</a>, <a href="mailto:j.previte@business.uq.edu.au">j.previte@business.uq.edu.au</a>, <a href="mailto:ann-marie.kennedy@canterbury.ac.nz">ann-marie.kennedy@canterbury.ac.nz</a></td>
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<tr>
<td>Subsistence Marketing &amp; Development</td>
<td>Srini Venugopal, Andrés Barrios</td>
<td><a href="mailto:Srinivas.Venugopal@uvm.edu">Srinivas.Venugopal@uvm.edu</a>, <a href="mailto:andr-bar@uniandes.edu.co">andr-bar@uniandes.edu.co</a></td>
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<tr>
<td>Sustainable &amp; Ethical Consumption</td>
<td>Sabrina V. Helm, Joya Kemper</td>
<td><a href="mailto:helm@email.arizona.edu">helm@email.arizona.edu</a>, <a href="mailto:j.kemper@auckland.ac.nz">j.kemper@auckland.ac.nz</a></td>
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<tr>
<td>Technological Advances and Marketing Futures</td>
<td>Tracy Harwood, Tony Garry, Russ Belk</td>
<td><a href="mailto:tharwood@dmu.ac.uk">tharwood@dmu.ac.uk</a>, <a href="mailto:tony.garry@otago.ac.nz">tony.garry@otago.ac.nz</a>, <a href="mailto:rbelk@schulich.yorku.ca">rbelk@schulich.yorku.ca</a></td>
</tr>
</tbody>
</table>
# Table of Contents

Can Sustainability Information Change Consumer Choice? The Response to Preference-Inconsistent Information ................................................................. 1

Addressing the Ethical Challenge of Market Inclusion in Base-of-the-Pyramid Markets: A Macromarketing Approach ........................................... 6

Islamic Influences on the Global, Local Identity Aspects of the Emirati Consumers ............ 7

‘Purpose-Built’ Community and Market Development: Reconnecting Excluded Human Beings ................................................................. 8

The Dynamic Effects of Policy and Marketing Systems on Peace and QOL: Empirical Evidence from Medellin, Colombia ........................................ 10

The Influence of Impoverished Contexts on Activities Related to Sustainability in Marketing Systems ......................................................................... 16

Victor Lebow: A Forgotten (or Perhaps Unknown) Pioneer in Critical Marketing .......... 17

Marketplace Mythologies in Finnish Energy Governance ................................................ 35

Of Algorithms and Mimesis: GAFA, Digital Personalization, and Freedom as Non-Domination ........................................................................... 39

Using Design Thinking to Understand the Transgender Consumer ................................ 40

The Globalization of Culture: A Qualitative Study on Fashion Blogs as Soft Power Resources .............................................................................. 46

Moving beyond individuals: A practice theory approach to address unsustainable household water consumption ......................................................... 47

The Future Of Meat: Protein Wars And The Changing Canadian Consumer From A Macromarketing Perspective .............................................. 51

A Systematic Review of Sugar Sweetened Beverage Taxation – A Future Research Agenda for Macromarketers ......................................................... 52

Back to Basics: Revisiting Observational Research to Study Macromarketing Phenomena - Begging as Exemplar ...................................................... 54

Is Big Data Short Sighted: Rediscovering the Voice of the Customer ........................... 76

Macromarketing Pedagogical Challenges and Concerns: Listen, Learn, Leverage .......... 79

Systems Social Marketing and Macro-Social Marketing: A Systematic Review and Methodological Critique of the Literature and Interventions ........... 95

A Decolonial Perspective of Consumerist Practices by Proteste in Brazil .................... 104

A social marketing campaign for gender equality in the workplace ............................ 105

The Complicated Task of Teaching Marketing Systems ................................................. 112

An Analysis of the Relationships between Macro-Structural Factors and Bribery based on Economic Development ............................................. 114

Applying the Integrative Justice Model to Predict Transformative Impact: The Case of Jesuit Worldwide Learning, Higher Education at the Margins ............ 118
What Have We Done to Our Wheat? God Didn’t Make it This Way: Rethinking the Roots of Gluten Issues .............................................................. 121
Exploring the Ingredients of Lucrative Corporate Endorsement Investments on Female Golfers in the Korean Ladies Professional Golf Association .............................................................. 123
Food Consumption, Cultural Identity, and the New Consumers in Developing Societies ... 130
Proposed Course: Marketing and Society: Understanding Marketing Systems ...................... 134
Negotiating And Navigating Womanhood: A Historical Perspective ................................ 136
Location Based Services is tracking YOU: a Netnographic perspective on challenges and opportunities from UK consumers .................................................................................. 140
The Social Construction of Mythologies ............................................................................. 143
We now interrupt this dominant social paradigm: Promoting sustainable lifestyles through market-enabled global mélangé .................................................................................. 147
Cultural Co-creation and the Changing Urban Landscape ..................................................... 152
Buying Immortality in a Changing Climate: A Terror Management Approach .................. 153
The “Esperanto” of business... or how to be successful in life: A postcolonial reading, using semiotics, of advertisements for English courses in Brazil ...................................................................... 163
Unravelling the Past as We Know It: A Historical Analysis of the Development of Gendered Discourses in Malaysia ............................................................................................. 180
Effective fundraising for sustainable support of children in poverty: The influence of child photos on donations in the context of child sponsorship ........................................................................ 186
Entrepreneurial Marketing For Social Enterprises – The Case Of A Bop-Centric Rice Value Chain ................................................................................................................................. 190
Financial exclusion, vulnerability and coping strategies –the transformative role of banks. 193
Laudato si’ – A Macromarketing Manifesto? ...................................................................... 201
“Hunger Games, and Counterintuitive Findings: Is Social Capital Useful for Smallholder Farmer-Entrepreneurs (SFEs)?” .................................................................................. 229
Clashing Cultures and Sub-Cultures in the Formation, Growth and Continuing Evolution of Complex Provisioning Systems .................................................................................. 231
Rocking Agri-Food Systems Through Sustainability-Oriented Innovation ......................... 243
Using Film Narrative to Enhance Cultural Intelligence for Markets in a Globalized World 247
Practising Ethical Consumerism: Using Practice Theory to Analyse Consumer Behaviour Change ............................................................................................................................. 253
The Power of Authenticity: The Influence of Corporate Social Responsibility Authenticity on Consumer Judgments .............................................................................................. 257
Macromarketing and Ashoka U’s Changemaker Learning Outcomes ................................. 266
World Of Foodcraft: Foraging, Game-Play, And Mindfulness ........................................... 267
How do consumers behave during Intercultural Service Encounters in Lebanon? The case of Syrian refugee employees .................................................................................................. 271
Barriers and Facilitators for Mixed Reality Experiences in Marketing ............................... 277
Brand Externalities: A Taxonomy ........................................................................................ 279
The Role of Social Media in Marketing Systems ................................................................. 315
Relational Autonomy and the Pregnancy, Childbirth and Post-partum Customer Journey: A Micro, Meso and Macro Perspective ................................................................. 316
Topic modeling as a Macromarketing Methodology: Critical Insights from Analysis of Citizen Visions in Relation to Sustainable Innovation ................................................................. 324
Further Reflections on Macromarketing Pedagogy .......................................................... 339
Consumer behavior responses to the disposal of potentially harmful products and subjective wellbeing ................................................................. 343
Fairtrade Towns: A Community Based Social Marketing Perspective in Promoting Ethical Consumption ................................................................. 344
An integrative justice approach towards fair and ethical intermediaries in base of the pyramid markets .............................................................................................................................................. 358
Consumer Behavior in Japan as Declaration of Acceptance and Rejection through changes in Group Definition as related to Social Conditions (from Gay to LGBT) ................................................................. 360
Transformation Agenda and Sustainability Innovation for societal transformation through sustainable business practices ................................................................. 364
Marketing Preventive Health to Baby Boomers: What if Unhealthy Lifestyles are Attributable to the Counterculture? ................................................................. 368
Engaging students in the reality of macromarketing: A classroom exercise connecting sustainability goals to economic objectives ................................................................. 373
The Macromarketing of Women Economic Empowerment and its Disconnections with Micro-level Lived Realities: The Importance of Considering Time Poverty in Well-being & Empowerment Studies .............................................................................................................................................. 386
Issue Arena for Food Waste: Toward Socio-Cultural Change in Social Marketing ................. 388
Social exclusion in the credit market in Europe ........................................................................ 394
Surveillance Capitalism: An Exploration into Research Directions in Marketing ......................... 395
The Adoption of New Consumption Behaviors in Developing Food Systems ................................. 401
Well-Being Through Negotiated Agency: A Study of Women Entrepreneurs in Subsistence Contexts .............................................................................................................................................. 405
A brand’s involvement in socio-political issues: Seeking positive social change or jumping on the bandwagon for profit? .............................................................................................................................................. 406
Darks Sides of Alternative Foods Markets .................................................................................. 409
Prohibitions, Boycotts, and Resisting the Green Dragon: Right-Wing Anti-Consumption in America .............................................................................................................................................. 412
Consumption Category’s Effect on Facets of Well-Being ................................................................. 427
Teaching (Macro)marketing ........................................................................................................ 433
Oreos and Kombucha? The Effect of Big Food Companies Acquiring Health Brands on Shareholder Value ................................................................. 438
## 2019 Macromarketing Conference Brief Overview

<table>
<thead>
<tr>
<th>Sessions</th>
<th>Time</th>
<th>25th June</th>
<th>26th June</th>
<th>27th June</th>
<th>28th June</th>
<th>29th June (morning only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morning Tea</td>
<td>10.30am - 11am</td>
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<td>Sessions</td>
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<td>Afternoon Tea</td>
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<td>Sessions</td>
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<td>Evening Activity</td>
<td>TBC</td>
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<td>5pm - 7pm: Main Conference Opening Reception 7.30pm: Macromarketing Board Meeting</td>
<td>Cleveland Rocks Macro</td>
<td>Theatrical Rock Experience Gala Dinner and Awards at Rock and Roll Hall of Fame</td>
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<tr>
<td>Session 1 (27th)</td>
<td>Session 2 (27th)</td>
<td>Session 3 (27th)</td>
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<tr>
<td>Ethics, Equity and Social Justice 1/2</td>
<td>Sustainable and Ethical Consumption 1/2</td>
<td>Food Marketing 1/3</td>
<td>Macromarketing Measurement and Methods 2/2</td>
<td>Ethics, Equity and Social Justice 2/2</td>
<td>Subsistence Marketing &amp; Development 2/2</td>
<td>Macromarketing and Climate Change Workshop</td>
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<tr>
<td>Poverty, Structural Inequalities and social exclusion 1/1</td>
<td>Subsistence Marketing &amp; Development 1/2</td>
<td>Globalisation, (Neo)Colonialism, and Marketing 1/1</td>
<td>Sustainable and Ethical Consumption 2/2</td>
<td>Social marketing - How to Rock and Roll Social Change 2/2</td>
<td>Gender across the Spectrums: Intersectionalities and Macromarketing Topics with Macromarketing and Pedagogy</td>
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<td>Markets, Marketing Systems, and Elements of Culture 1/2</td>
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<td>Consumer Vulnerability 1/1</td>
<td>Quality of Life and Wellbeing with Anti-Consumption</td>
<td>Food Marketing 2/3</td>
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<td>Macromarketing and Pedagogy 1/2</td>
<td>Technological Advances and Marketing Futures 1/2</td>
<td>Macromarketing and Pedagogy 2/2</td>
<td>Technological Advances and Marketing Futures 2/2</td>
<td>Markets, Marketing Systems, and Elements of Culture 2/2</td>
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Detailed Information: Plenary Sessions

Plenary 1. Macromarketing’s Connections with Other Disciplines
27th June: 9am-10.30am
Chair: Mark Peterson.
Panelists and topics:
1) Vicky Crittenden - a. Sustainability and b. Entrepreneurship;
2) Linda Ferrell - a. Ethics and b. Accounting;
3) O. C. Ferrell - a. Ethics and b. Managerial Marketing,
4) Chuck Ingene - a. Retailing and b. Economics,

Plenary 2. Thoughts on the Future of QOL and Ethics Research Inspired by Joe Sirgy
28th June: 9am-10.30am
Chair: Mark Peterson.
Panelists:
1) Ahmet Ekici,
2) Alexandra Ganglmair-Wooliscroft,
3) Gene Laczniak,
4) Don Rahtz,
5) Ben Wooliscroft.

Plenary 3. Jim Gentry’s Contributions to Consumer Research
29th June: 9am-10.30am
Chair: Mark Peterson.
Panelists:
1) Stacey Baker,
2) Ahmet Ekici,
3) Terri Rittenburg,
4) John Mittelstaedt,
5) Jie Fowler,
6) Cliff Shultz.
<table>
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<tr>
<th>Session 1 (27th June 11am-12.30pm)</th>
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<td><strong>Ethics, Equity and Social Justice 1/2</strong>&lt;br&gt;Room: TBC&lt;br&gt;Track Chairs: Joya Kemper and Cathy McGouran&lt;br&gt;An integrative justice approach towards fair and ethical intermediaries in base of the pyramid markets Nicholas J.C. Santos&lt;br&gt;<strong>Laudato is’, A Macromarketing Manifesto?</strong>&lt;br&gt;<em>Thomas A. Klein and Gene R. Laczniak</em>&lt;br&gt;An Analysis of the Relationships between Macro-Structural Factors and Bribery based on Economic Development Ahmet Ekici and Sule Onsel-Ekici</td>
<td><strong>Sustainable and Ethical Consumption 1/2</strong>&lt;br&gt;Room: TBC&lt;br&gt;Track Chair: Sabrina Helm and Joya Kemper&lt;br&gt;We now interrupt this dominant social paradigm: Commercializing cross-cultural borrowing for the promotion of sustainable lifestyles Sarah Grace&lt;br&gt;<strong>Buying Immortality in a Changing Climate: A Terror Management Approach</strong>&lt;br&gt;Sabrina Helm and Grace Wofford&lt;br&gt;Mobilizing Consumers to Embrace the Natural World Vimala Kunchamboo, Christina Lee and Vicki Little</td>
<td><strong>Food Marketing 1/3</strong>&lt;br&gt;Room: TBC&lt;br&gt;Track Chairs: Claudia Dumitrescu and Renée Shaw Hughner&lt;br&gt;<strong>Dark Sides of Alternative Foods Markets</strong>&lt;br&gt;Forrest Watson and Ahmet Ekici&lt;br&gt;<strong>The Future of Meat: Protein Wars and the Changing Canadian Consumer from a Macromarketing Perspective</strong>&lt;br&gt;Sylvain Charlebois, Janet Music, and Simon Somogyi&lt;br&gt;<strong>The Adoption of New Consumption Behaviors in Developing Food Systems</strong>&lt;br&gt;Ann Veeck, Thaweephan Leingpibul, Hu Xie, and Gregory Veeck</td>
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<td><strong>Poverty, Inequalities and Structural Exclusion 1/1</strong>&lt;br&gt;Room: TBC&lt;br&gt;Track Chair: Pia Polsa and Olga Kravets&lt;br&gt;The Influence of Impoverished Contexts on Activities Related to Sustainability in Marketing Systems Stefanie Beninger&lt;br&gt;Financial exclusion, vulnerability and coping strategies – the transformative role of banks Sohail Kamran, Pia Polsa and Outi Uusitalo&lt;br&gt;Social exclusion in the credit market in Europe Päivi Timonen, Ilja Kavonius and Juha Honkkila</td>
<td><strong>Subsistence Marketing &amp; Development 1/2</strong>&lt;br&gt;Room: TBC&lt;br&gt;Track Chair: André Barrios and Srinivas Venugopal&lt;br&gt;Addressing the Ethical Challenge of Market Inclusion in Base-of-the-Pyramid Markets: A Macromarketing Approach Anaka Aiyar and Srin Venugopal&lt;br&gt;Reflections on Cambodia’s Development, 25 Years Post-UNTAC: Now What? Clifford J. Shultz, Don R. Rahtz and Kerry Slattery&lt;br&gt;Hunger Games, and Counterintuitive Findings: Is Social Capital Useful for Smallholder Farmer-Entrepreneurs (SFES)? Marcia Kwaramba</td>
<td><strong>Globalisation, (Neo)Colonialism, and Marketing 1/1</strong>&lt;br&gt;Room: TBC&lt;br&gt;Track Chair: Marcus Wilcox Hemais&lt;br&gt;<strong>The “Esperanto” of business... or how to be successful in life: A postcolonial reading, using semiotics, of advertisements for English courses in Brazil</strong>&lt;br&gt;Marcus Wilcox Hemais, Luis Alexandre Pessão, and Denise Franca Barros&lt;br&gt;A Decolonial Perspective of Consumerist Practices by Proteste in Brazil Rafaela Barbosa dos Santos&lt;br&gt;Marcus Wilcox Hemais&lt;br&gt;<strong>The Globalization of Culture: A Qualitative Study on Fashion Blogs as Soft Power Resources</strong>&lt;br&gt;Carolina de Oliveira Brandão&lt;br&gt;Roberta Dias Campos and Marcus Wilcox Hemais</td>
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<td>Richard S. Lowry and Don R. Rahtz</td>
<td>Sarah Maree Duffy, Aila Khan, Patrick Van Esch and Meg Smith</td>
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<td>Benton Jr., Raymond</td>
<td>Christine Domegan, Dmitry Brychkov, Tina Flaherty, Mihir Anand</td>
<td>Petteri Repo, Kaisa Matschoss, Bjørn Bedsted, Zoya Damianova, and Ventseslav Kozarev</td>
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<tr>
<th>Special joint-session on Gender &amp; Development</th>
<th>Macromarketing and Pedagogy 1/2</th>
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<td>Track Chair: June Francis</td>
<td>Track Chair: Tracy Harwood</td>
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<tr>
<td>The Macromarketing of Women Economic Empowerment and its Disconnections with Micro-level Lived Realities: The Importance of Considering Time Poverty in Well-being &amp; Empowerment Studies</td>
<td>Further Reflections on Macromarketing Pedagogy</td>
<td>The role of social media in marketing systems</td>
</tr>
<tr>
<td>Laurel Steinfeld and Diane Holt</td>
<td>Alex Reppel and Darryn Mitussis</td>
<td>Rachel Patrick</td>
</tr>
<tr>
<td>Well-Being Through Negotiated Agency: A Study of Women Entrepreneurs in Subsistence Contexts</td>
<td>Teaching (Macro)marketing</td>
<td>Location based services is tracking YOU: a netnographic perspective on challenges and opportunities from UK consumers</td>
</tr>
<tr>
<td>Sriniv Venugopal Madhu Viswanathan</td>
<td>Ben Wooliscroft</td>
<td>Shelton Giwa, Suha Omar and Anne Broderick</td>
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<td>Macromarketing &amp; Ashoka U's Changemaker Learning Outcomes</td>
<td>Cultural co-creation and the changing urban landscape</td>
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<td>Robert Mittelman</td>
<td>Tracy Harwood and Tony Garry</td>
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<td>Engaging Students in the Reality of Macromarketing: A Classroom Exercise Connecting Sustainability Goals to Economic Objectives</td>
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<td>Julie Stanton</td>
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<tr>
<td>Session 4 (28th June 11am-12.30pm)</td>
<td>Session 5 (28th June 2pm-3.30pm)</td>
<td>Session 6 (28th June 4pm-5.30pm)</td>
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<tr>
<td><strong>Macromarketing Measurement and Methods 2/2</strong> &lt;br&gt; Room: TBC &lt;br&gt; Track Chair: Francisco Conejo and Ben Wooliscroft &lt;br&gt; Brand Externalities: A Taxonomy &lt;br&gt; Shoaib M. Farooq Padela, Ben Wooliscroft, and Alexandra Ganglmair-Wooliscroft &lt;br&gt; Back to Basics: Revisiting Observational Research to Understand Macromarketing Phenomena – Street Solicitors as an Exemplar Francisco Conejo and Ben Wooliscroft</td>
<td><strong>Ethics, Equity and Social Justice 2/2</strong> &lt;br&gt; Room: TBC &lt;br&gt; Track Chairs: Joya Kemper and Cathy McGouran &lt;br&gt; The Power of Authenticity: The Influence of Corporate Social Responsibility Authenticity on Consumer Judgments Soyoung Joo, Elizabeth G. Miller and Janet S. Fink &lt;br&gt; A brands involvement in socio-political issues: Seeking positive social change or jumping on the bandwagon? Jessica Vredenburg, Sommer Kapitan, Amanda Spry and Joya Kemper &lt;br&gt; Transformation Agenda and Sustainability Innovation for societal transformation through sustainable business practices Samuel Petros Sebhatu and Bo Enquist</td>
<td><strong>Subsistence Marketing &amp; Development 2/2</strong> &lt;br&gt; Room: TBC &lt;br&gt; Track Chair: Andrés Barrios and Srinivas Venugopal &lt;br&gt; Purpose-Built’ Community and Market Development Stacey Menzel Baker &lt;br&gt; How do consumers behave during Intercultural Service Encounters in Lebanon Beatriz de Quero Navarro, Karine Aoun Barakat, Clifford J. Shultz II, Rafael Araqe Padilla and Maria Jose Montero Simo &lt;br&gt; The Dynamic Effects of Policy and Marketing Systems on Peace and QOL: Empirical Evidence from Medellin, Colombia Andrés Barrios, Clifford J. Shultz, Don R. Rahtz, Deborah F. DeLong &lt;br&gt; Consumer behavior responses to the disposal of potentially harmful products and subjective wellbeing Sergio Enrique Robles-Avila</td>
</tr>
<tr>
<td><strong>Sustainable and Ethical Consumption 2/2</strong> &lt;br&gt; Room: TBC &lt;br&gt; Track Chair: Sabrina Helm and Joya Kemper &lt;br&gt; Can Sustainability-Related Information Change Consumer Choice? The Response to Preference-Inconsistent Information Sunyong Ahn and Sabrina Helm &lt;br&gt; The influence of child photos on donations in the context of child sponsorship: effective fundraising for sustainable support of children in poverty Jang Hyunkyu &lt;br&gt; Practicing ethical consumerism: using practice theory to analyse consumer behavior change Cathy McGouran</td>
<td><strong>Social marketing - How to Rock and Roll Social Change 2/2</strong> &lt;br&gt; Room: TBC &lt;br&gt; Track Chair: Jo Previte and Christine Domegan &lt;br&gt; Fairtrade Towns: A Community Based Social Marketing Perspective in Promoting Ethical Consumption Anthony Samuel and Ken Peattie &lt;br&gt; Issue Arena for Food Waste: Toward Socio-Cultural Change in Social Marketing Ulla-Maija Sutinen and Elina Näränen &lt;br&gt; The dirty, dangerous and daunting tale of cleaning practices: Tackling unsustainable water consumption through practice theory Chan, Lay Tyng</td>
<td><strong>Special joint-session on Gender &amp; Pedagogy with Macromarketing and Pedagogy</strong> &lt;br&gt; Room: TBC &lt;br&gt; Track Chair: Laurel Steinfield</td>
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<tr>
<td><strong>Intersectionality in the Business School Experience</strong> Laurel Steinfield</td>
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<tr>
<td>Consumer Vulnerability 1/1</td>
<td>Quality of Life and Wellbeing with Anti-Consumption</td>
<td>Food Marketing 2/3</td>
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<td>Track Chair: Terry Pavia</td>
<td>Track Chair: Alexandra Ganglmair-Wooliscroft</td>
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<td>and Terri Rittenburg</td>
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<tr>
<td>The malay muslim woman: vulnerability in the pursuit of beauty</td>
<td>Marketing Preventive Health to Baby Boomers: What if Unhealthy Lifestyles are Attributable to the Counterculture? Anyuan Shen</td>
<td>Food Consumption, Cultural Identity, and the New Consumers in Developing Societies Jie G. Fowler, Rongwei Chu, and Ann Veeck</td>
</tr>
<tr>
<td>Juliana French</td>
<td>Prohibitions, Boycotts, and Resisting the Green Dragon: Right-Wing Anti-Consumption in America Terrence H. Witkowski</td>
<td>Rocking Agri-Food Systems Through Sustainability-Oriented Innovation Victoria J. Little</td>
</tr>
<tr>
<td>Relational Autonomy and the Pregnancy, Childbirth and Post-partum Customer Journey: A Micro, Meso and Macro Perspective</td>
<td>Consumption Category’s Effect on Facets of Well-Being Alexandra Ganglmair-Wooliscroft</td>
<td>World Of Foodcraft: Foraging, Game-Play, And Mindfulness Emily M. Moscato, Charlene A. Dadzie, and Joshua D. Dorsey</td>
</tr>
<tr>
<td>Teresa Pavia, Katherynn Pounders and Monica LaBarge</td>
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<td>An Entrepreneurial Marketing Model For Social Enterprises Partnering The BoP – Perspectives From A Rice Value Chain Priyanka Jayashankar, Sree Nilakanta, Wesley Johnston, and Geetha Mohan</td>
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<thead>
<tr>
<th>Macromarketing and Pedagogy 2/2</th>
<th>Technological Advances and Marketing Futures 2/2</th>
<th>Markets, Marketing Systems, and Elements of Culture 2/2</th>
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<tbody>
<tr>
<td>Room: TBC</td>
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<tr>
<td>Track Chair: Stan Shapiro</td>
<td>Track Chair: Tracy Harwood</td>
<td>Track Chair: Ingrid Becker</td>
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<tr>
<td>The Complicated Task of Teaching Marketing Systems</td>
<td>Barriers and facilitators for mixed reality experiences in marketing Suha Omar and Tracy Harwood</td>
<td>The Social Construction of Mythologies Sarah C. Grace</td>
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<tr>
<td>Stefanie Beninger and June Francis</td>
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<tr>
<td>Macromarketing : Pedagogical Challenges &amp; Concerns—Listen, Learn &amp; Leverage Christine Domegan and Patricia McHugh</td>
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<tr>
<td>Macro Level Teaching of Consumer Behavior through Social Marketing Forrest Watson</td>
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<td>Session 7 (29th June 11am-12.30pm)</td>
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<td><strong>Gender across the Spectrums: Intersectionalities and Macromarketing Topics 2/2</strong></td>
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<td>Track Chair: Laurel Steinfield</td>
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<td>Exploring the Ingredients of Lucrative Corporate Endorsement Investments on Female Golfers in the Korean Ladies Professional Golf Association</td>
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<td>Janet S. Fink and Soyoung Joo</td>
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<td>Consumer Behavior in Japan as Declaration of Acceptance and Rejection through changes in Group Definition as related to Social Conditions (from Gay to LGBT)</td>
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<td>Hajime Sasaki</td>
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<td>Unravelling the Past as We Know It: A Historical Analysis of the Development of Gendered Discourses in Malaysia</td>
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<td>Aminath Shaba Ismail, Christina Lee Kwai Choi and Juliana Angeline French</td>
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<th><strong>Food Marketing 3/3</strong></th>
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<tbody>
<tr>
<td>Room: TBC</td>
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<tr>
<td>Track Chair: Claudia Dumitrescu and Renée Shaw Hughner</td>
</tr>
<tr>
<td>Oreos and Kombucha? The Effect of Big Food Companies Acquiring Health Brands on Shareholder Value</td>
</tr>
<tr>
<td>Wonjoo Yun and Nicole Hanson</td>
</tr>
<tr>
<td>A Systematic Review of Sugar Sweetened Beverage Taxation – A Future Research Agenda for Macromarketers</td>
</tr>
<tr>
<td>Gerardine Doyle, Lisa Marriott, and Marius Claudiy</td>
</tr>
<tr>
<td>What Have We Done to Our Wheat? God Didn't Make It This Way: Rethinking the Roots of Gluten Issues</td>
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<tr>
<td>Tina Facca-Miess and Carole Doueiry</td>
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<th><strong>Macromarketing and Climate Change Workshop</strong></th>
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<td>Room: TBC</td>
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<td>Workshop Leaders: Sabrina Helm and Vicki Little</td>
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*Please read the following for preparation which is in the proceedings:*

Calling all macromarketers: Vanguards for sustainability in a +1.5°C world?

Vicki Little and Sabrina Helm
Can Sustainability Information Change Consumer Choice? The Response to Preference-Inconsistent Information
Sun Young Ahn, Washington College, USA
Sabrina V. Helm, University of Arizona, USA

Introduction
Sustainability has been identified as a megatrend evoking different perspectives in macromarketing thought (Mittelstaedt et al. 2014). One perspective to address issues surrounding sustainability in a consumption context is to view consumption based on traditional psychological and marketing conceptualizations as individual choice and information processing (Schaefer and Crane 2005). “Green” consumption - that is the purchase and use of products designed to limit negative environmental impacts (Strizhakova and Coulter 2013) - implies that, overall, more sustainable consumption patterns will be achieved through consumer demand for goods and services with smaller ecological footprint, providing an incentive for marketers to offer such products (Schaefer and Crane 2005). However, such product offerings often compete with existing products, in particular, when consumers already have established loyalty to a brand, and consumers’ willingness and capability to process new (product) information is limited.

Consider the following everyday consumption scenario: a consumer needs shampoo. Even though she already has a preferred brand, she uses her mobile phone to search for additional information at the point of purchase. She comes across new information that the particular brand she likes contains chemicals that are harmful to health and the environment. How would this new information that is inconsistent with her prior preference affect her choice? Would there be any change in her final choice? This scenario raises the issue of how adding new information which contradicts consumers’ prior preferences affects their decision-making, a vital question in a “green” product context because, for many consumers, considering sustainability-related criteria in their consumption choices is a relatively new phenomenon.

According to cognitive dissonance theory (Festinger 1957), consumers may feel discomfort (i.e. cognitive dissonance) when they attain inconsistent information. Literature on selective exposure also argues that individuals are motivated to seek out information that is consistent with their preference, and ignore information that is inconsistent with their preference (Kunda 1990). Thus, prior studies have shown that preference-inconsistent information is not persuasive for consumer decision making (Jain and Maheswaran 2000).

This issue is particularly interesting to investigate in the context of sustainable consumption because, currently, online and mobile information tools focusing on “green” product features (e.g., GoodGuide) are presenting new opportunities and alternatives to increase green consumption (Barboza and Filho 2019). These sustainability information tools may help consumers make more informed purchasing decisions (Gleim et al. 2012), but environmental purchase criteria compete with other criteria, including past experiences and existing brand loyalty. Previous studies indicate that consumers are more likely to ignore sustainability information in favor of other evaluation criteria (Ehrich and Irwin 2005). However, literature on selective exposure has shown that there are factors that may mitigate consumers’ defensive process toward preference-inconsistent information (see Hart et al. 2009). Thus, this study aims to investigate the process how preference-inconsistent sustainability information can be considered as important, consequently changing consumers’ initial preference to green alternatives.
Conceptual Background and Hypotheses Development

The current study focuses on two stages of information processing in consumer resistance mechanisms (Ahluwalia 2000). First is the acceptance process, which determines the acceptance/denial of a target message. The second process, the evaluation process, deals with the analysis of attributes of the information. While the first process deals with the acceptance or denial of the preference-inconsistent information itself, the latter process extends the focus to evaluations about attributes of the message. Since the mechanisms take into account why consumers refute the inconsistent information, the study provides a theoretical framework to understand how consumers’ defensive mechanisms can be mitigated. The current study examines if there are any boundary conditions that alleviate consumers’ defensive information processing toward preference-inconsistent information and encourage them to alter their choice in a sustainable consumption context.

In the acceptance process, two variables are proposed: Previous studies suggested that commitment to a certain position is a necessary precondition for biased information-seeking (Ahluwalia 2000). Studies also revealed that, when the preference-inconsistent information is difficult to refute, individuals are more likely to accept the inconsistent information (Ditto et al. 1998). Source credibility is especially vital to convey a message aimed at behavioral change and persuasion (Tormala, Brinol and Perry, 2007). Therefore, the current study postulates that low brand commitment (H1) and credible information format (H2) will engender higher acceptance of the preference-inconsistent information. In addition, we hypothesize that the credibility of the preference-inconsistent information will buffer the effect of brand commitment on acceptance of the information (H3).

Next, the study establishes hypotheses to understand the evaluation process. Heider’s balance theory (1945) explains how the potential discrepancy between consumer values and prior preference influences the effectiveness of persuasion. It is argued that defensive motivation will be alleviated when one’s enduring values are not reflected in the new information (Johnson and Eagly 1989). If consumers are confronted with value-relevant information, the tendency to be persuaded by the inconsistent information is amplified. We examined environmental concern as a value factor (Stern and Dietz, 1994). Thus, given that preference-inconsistent information is accepted, it is hypothesized that consumers characterized by high (vs. low) environmental concern will exhibit increased likelihood to change their initial choice (H4). During this evaluation process, the increased relative weighting of the dissonance attribute (Ahluwalia 2000; i.e., sustainability attribute) will result in positive persuasion outcomes to change to a sustainable alternative. Thus, it is also hypothesized that the H4 relationship is mediated by relative weighting of the importance of ‘sustainability’ attributes (H5).

Methods

To test H1-H3, a 2 (exposure to information: preference-consistent information vs. preference-inconsistent information) by 2 (brand commitment: high vs. low) by 2 (credibility of information: credible vs. non-credible) between-subjects factorial design was used in Study1 (N=361). First, subjects were presented with a written statement with two fictitious shampoo product descriptions (“Miravel” and “Lavera”) as well as a statement that 83% of consumers are more satisfied with Miravel than Lavera to create subjects’ initial preference. After the initial preference creation, subjects were given one of two brand commitment conditions: for the high (vs. low) commitment, subjects were given a scenario indicating that after they purchased Miravel, they became loyal to the brand (vs. they felt little difference to other brands). The sustainability information was created and designed visually based on the GoodGuide information format and other formats of sustainability information available in supermarkets (e.g., Whole Foods Market’s Eco-Scale). The preference-consistent condition
was manipulated so that the preferred brand (Miravel) had a higher score (i.e., an overall score of 8.4 out of 10) than Lavera (i.e., an overall score of 2.5 out of 10) with regard to health, social, and environmental impacts. The preference-inconsistent condition was the opposite. When subjects were given the sustainability information, subjects in the credible (vs. non-credible) source condition were informed that the information is excerpted from Consumer Reports (vs. a promotional website prepared by the highly rated brand). Then, the extent to which subjects accepted the information for their decision making was assessed using three items (Edward, Li and Lee 2002), in addition to control variables (consumer skepticism and product involvement) and demographic variables.

To test H4 and H5, a similar procedure to Study 1 was used in Study 2 (N=352) as a 2 (environmental concern: high vs. low) by 2 (credibility of information: credible vs. non-credible) design. In Study 2, preference-inconsistent information was given to all respondents, and the focal condition is the credible preference-inconsistent information condition. Environmental concern was measured with 8 items (Mainieri et al. 1997), and on the basis of a median split, subjects were divided into high and low environmental concern groups. Additional variables such as the relative weighting of sustainability attributes (e.g., Jaccard, Brinberg, and Ackerman 1986) and control variables (consumer skepticism, product involvement, and perceived consumer effectiveness) and demographic variables were measured. Finally, subjects were also asked to choose their preferred brand at the end given what they know about the brands after they were exposed to the new information to measure choice change (Jain and Maheswaran 2000). Both studies were conducted online, using Amazon Mechanical Turk to recruit subjects (Paolacci, Chandler, and Ipeirotis 2010).

**Results**

All manipulation checks were successful. Findings of Study 1 conclusively demonstrated the importance of the credibility of preference-inconsistent information in the acceptance process. Subjects in the credible information cell showed significant difference in acceptance of the preference-inconsistent information (MCR = 5.63, MNCR = 4.62; F = 18.69, p < .001). The effect of brand commitment showed an interesting result in that high commitment consumers had a higher acceptance of inconsistent information (MHigh = 5.39, MLow = 4.86; F = 5.27, p < .05), opposing H1. High commitment consumers may have felt “betrayed” when they learned about negative aspects of the preferred brand, in accordance with impression formation literature (Fiske 1980). We also observed a significant interaction between brand commitment and credibility of information on acceptance of information (F = 6.78, p < .01), which provides evidence to support H4. The results revealed that brand commitment influenced the acceptance of the preference-inconsistent information only when the information was non-credible. For the credible information group, brand commitment conditions did not have a differential impact, which suggests a buffer effect. Binary logistic regression results in Study 2 showed that environmental concern had a significant positive effect on choice change (b = 2.76, Exp (B) = 15.78, p < .001). The results also confirmed the significant positive effect of the high credibility of inconsistent information on choice change (b = .80, Exp (B) = 2.21, p < .01) replicating the findings of Study 1. A mediation analysis also revealed that the relative weighting of sustainability attributes generated by the high (vs. low) environmental concern group significantly mediated the increased choice change to Lavera given the credible preference-inconsistent information (Sobel z = 3.04, p < .001).

Findings in Study 1 and Study 2 conclusively demonstrated the importance of the credibility of preference-inconsistent information in the acceptance and evaluation process. Also, findings suggested that the effect of credibility is stronger than that of brand commitment in the acceptance process. Findings additionally demonstrated the importance of environmental
concern in the evaluation process. Moreover, results supported that the relative weighting of sustainability attributes is driving the effects of environmental concern as a mediator on persuasion outcomes in the evaluation process.

Discussion

The current study contributes to understanding the process in which the preference-inconsistent information can be effective in influencing consumer choice. The findings from this research can guide marketers and information providers in establishing effective messages to increase acceptance of the message and to change consumers’ behavior in sustainable consumption context, adding to previous research that established consumers’ predisposition to ignore sustainability information in favor of other evaluation criteria (Ehrich and Irwin 2005). As long as information sources are perceived as credible, and consumers show environmental concern, even brand loyal consumers are prone to select the more sustainable product option. For some retailers, adding information about how their eco-label scale is scientifically calculated using a credible source could be an effective strategy (e.g., Whole Food’s Eco-scale).

Our study is limited by the typical factors associated with experimental scenario designs and sampling procedure; in terms of a broader macromarketing perspective, one can also argue that, instead of focusing on green marketing and incremental greening, much more radical, fundamental changes to sustainable lifestyles (e.g., minimized consumption) should be the focus of research, as green buying offers a loophole for continued consumption and resource waste (e.g., Jackson 2009). Future research could expand to other sustainable consumption areas and investigate how preference/habit-inconsistent information affects consumer choice in resource (energy, water) conservation, product sharing, or renting contexts.

References


Addressing the Ethical Challenge of Market Inclusion in Base-of-the-Pyramid Markets: A Macromarketing Approach

Anaka Aiyar, Tata-Cornell Institute, Cornell University
Srinivas Venugopal, University of Vermont, Burlington

Abstract

Providing low-income consumers access to transformative services such as healthcare is an ethical challenge of vital importance to marketers. However, most consumers at the base of the pyramid are excluded from the market for such transformative services because of financial constraints due to poverty. In this paper, instead of focusing on the micro-interplay between firms and consumers, we examine the macro-interplay among firms, consumers, and public policy in addressing the ethical challenge of market inclusion at the base of the pyramid.

Specifically, we examine how the Vietnam government used a policy of free and universal health insurance for children under the age of six as a means of lowering affordability barriers and fostering market inclusion in the healthcare market. Overnight in 2005, all children under the age of six living anywhere in Vietnam became eligible for free health insurance. Using this policy intervention as a natural experiment, we compare market inclusion outcomes of children under the age of six with older children who were ineligible before and after the program was implemented. We show that lowering affordability barriers through public policy (1) increases access to target services, (2) increases consumers’ overall out-of-pocket spending, and (3) increases access to complementary services. By adopting a macromarketing lens, this study makes a strong case for collaboration among firms, governments, and communities in addressing the ethical challenge of system-wide market inclusion in base-of-the-pyramid markets.
Islamic Influences on the Global, Local Identity Aspects of the Emirati Consumers

Roua Al Hanouti, LSMRC- MERCURE, University of Lille 2, France
Marie-Helene Fosse-Gomez, LSMRC- MERCURE, University of Lille 2, France

Abstract

We study the Islamic interpretations underlying the conflicting imperatives of global and local identity dynamics for the Emirati consumers. Despite several studies focusing on the cultural changes after the globalization, the influence of Islamic interpretations, have been largely unexamined. By using insights from in depth interviews with young Emirati consumers, we attempted to understand those interpretations. The analysis of the food rituals shows that there are emerging forms of Muslims, which are very useful in understanding responses to the conflicting imperatives. Consequently, Emirati consumers, interpret Islam to either overcome cultural and religious restrictions or to keep and maintain important cultural aspects. By the end, these interpretations help them keep up with the globalization trend, while trying to stay accepted in terms of cultural level. Our study seeks to expand our understanding of the behavior of Muslim consumers within an intensively globalized world and to provide better marketing approaches considering Islamic perspectives.
‘Purpose-Built’ Community and Market Development: Reconnecting Excluded Human Beings

Stacey Menzel Baker, Creighton University Omaha, USA

Abstract

Purposefully (re)built communities aim to tackle poverty, crime, decades of exclusion and neglect by city and county governments, and social conflict both within the community and between a community and other parts of the city (Saporta 2017). Organizations in various forms (commercial non-profit, governmental, and public-private partnerships) diagnose community deficits and assets and then strategically work to enhance the standard of living within community. Ultimately, how community assets and deficits are defined and understood impacts strategic decision-making, as well as the implementation of the efforts; further, implementation affects the degree of social change noticed within community, as well as perceived quality of life. For instance, if the end result of interventions is gentrification, whereby individuals previously living in the area are displaced because they can no longer afford to live there, then has poverty really been alleviated? Or, have people living in poverty just been displaced from one place to another, i.e., moved out of sight and out of mind? Certainly, a more hospitable environment for a particular area was the goal before gentrification, but, without policies designed to protect residents of a neighborhood prior to an intervention, a rejuvenated community may quickly become inaccessible for original inhabitants, thereby further lowering their perceived quality of life and dignity, and forcing them to move, perhaps even into homelessness.

The aim of my current work is to understand, to theorize, and to bolster strategic decision-making within organizations attempting to purposefully rebuild community, especially in relation to the material and food wellbeing of community characterized by extreme poverty and social conflict and exclusion. Over the last three years, I have observed two such communities in Omaha, Nebraska in the area commonly referred to as “North Omaha.” North Omaha consists of 31 square miles, a population of approximately 87,000 people, or 19 percent of Omaha’s total population. In 2013, data from the National Policy Center in Washington, D.C. reported the state of Nebraska had the highest rate of black homicide victimization in the country, largely attributed to violence within the area known as North Omaha (Ghosh 2014). North Omaha, a predominantly black neighborhood, has the highest concentration of poverty in the state, as well as the highest concentration of unemployment (25 percent, versus four percent for the rest of the state).

Both neighborhoods are classified as distressed on the continuum of distressed versus flourishing, as discussed by Shultz, Rahtz, and Sirgy (2017). My students and I have worked with two non-profit organizations working to enhance these disadvantaged communities, including Omaha Economic Development Corporation (OEDC) and Seventy-Five North, operating in two of the 12 villages that comprise North Omaha, specifically in the communities of North Village and Highlander Neighborhood (Gonzalez 2017; Kaufman 2017). In the case of OEDC, effort has focused on developing the brand identity of North Village, which has a rich history in jazz performance and as the birthplace of Malcolm X. This identity has helped to instill a sense of community, as OEDC and other commercial and non-profit organizations have simultaneously worked to meet consumer needs in a structured and piecemeal priority, focusing on needs perceived by particular organizations in a particular order, consistent with each organization’s mission. In the case of Seventy-Five North in the Highlander Neighborhood, effort has focused on simultaneously intervening in three interacting systems
of education, mixed-income housing, and health/wellness. OEDC’s progress in North Village primarily has been funded through grants and tax credits, and other non-profit organizations simultaneously work in this neighborhood. Seventy-Five North receives significant funding from major donors such as Warren Buffett, Susie Buffett, and the Kiewit Foundation. These two non-profit organizations, along with the collaborative networks they engage, have begun to address gaps in educational attainment and student outcomes, which are the lowest in the state, lack of adequate housing and a housing void brought on by the demolition of housing projects in 2008, and significant health and safety issues revolving around crime and poor public infrastructure and few (North Village) to no (Highlander) available commercial retail structures or services prior to their initiatives (Ghosh 2014).

The presentation will focus on describing the goals, progress, and desired outcomes within each community, and then theorize how the theory of social change that seems to underlie decision making and the nature and type of collaborative relationships within each community impacts progression and outcomes in each neighborhood. In particular, the material and food wellbeing in each community is evaluated on the basis of choice, access, and structural considerations, including the nature, type, and logic of the marketing system currently activated within the community to address consumer vulnerability (Baker, Gentry, and Rittenburg 2005; Baker et al. 2015; Shultz 2007; Shultz, Rahtz, and Sirgy 2017).

References


The Dynamic Effects of Policy and Marketing Systems on Peace and QOL: Empirical Evidence from Medellin, Colombia

Andrés Barrios, Universidad de Los Andes, Colombia
Clifford J. Shultz, Loyola University Chicago, USA
Don R. Rahtz, College of William & Mary, USA
Deborah F. DeLong, Chatham University, USA

Introduction

Marketing academics have called for researchers to take a broader focus in their work by researching “markets” and understand their effects on the world (Shultz 2007; Venkatesh and Penaloza 2006; Wilkie and Moore 2006). Of particular interest are markets located in developing countries where structural deficiencies such as skewed income distribution, minimal consumer information, and inadequate marketing infrastructure inhibit socioeconomic growth (Peterson and Ekici 2007). Studies across evolving geopolitical contexts demonstrate that policy changes and reforms to marketing systems can be catalysts for positive social change (e.g., Barrios et al. 2016; Layton 2009; Nguyen, Rahtz and Shultz 2014; Shultz 1997). In some cases, these systemic changes can serve the common good to facilitate quality-of-life (QOL) improvement for the people embedded in those systems.

Macromarketing is the study of marketing system formation and impact on society (e.g., Hunt 1977). A marketing system is a complex web of relationships in which market participants’ choices and actions have long-term consequences beyond the specific firms, partners, and customers involved (Mick 2007, 291). While macromarketing studies provide valuable insights into the dynamic effects of internal and external actors within a given system, factors influencing the emergence and evolution of a marketing system over time—and the weighted relationships of those factors—continue to offer fertile areas for research.

The dramatic change occurring in Medellin, Colombia demonstrates the positive role that marketing systems play in a region’s peace, economic development, and QOL (see also Barrios et al. 2016). Once widely acknowledged to be one of the most violent cities in the world, Medellin has, over the last decade, transitioned to a peaceful community and thriving touristic destination. Improved stability and well-being are apparent; precisely which factors—and the dynamic relationships among them—that are affecting this transformation is less clear. This study seeks to fill an important gap in the literature, by identifying the key drivers of Medellin’s marketing system transformation from turmoil to prosperity, efficiency and effectiveness.

Theoretical Background

Marketing systems

A marketing system is defined as “a network of individuals, groups, and/or entities; embedded in a social matrix, linked directly or indirectly through sequential or shared participation in economic exchange; which jointly and/or collectively creates economic value with and for customers, through the offer of assortments of products, services, experiences, and ideas and that emerge in response to or anticipation of customer demand.” (Layton, 2011, p.259). Of particular interest are markets located in developing countries, because of structural elements such as a different socioeconomic income distribution, lack of consumer information, and poorly developed infrastructure (Shultz et al. 2012).

Marketing systems and quality of life
The balance versus imbalance of a marketing system directly affects its members’ quality of life (Peterson and Ekici 2007; Sirgy 2001). A balanced marketing system provides opportunities for specialization, which in turn can promote the emergence of innovative entrepreneurs who then help to create new marketing systems. In contrast, an imbalanced marketing system provokes inefficiencies that adversely impact the desired standard of living (Layton 2009).

**Market System Transformation**

A variety of endogenous and exogenous factors in the marketing system interact to enhance or diminish value-creation opportunities for its members (consumers, marketers, and government entities) (Shultz, Rahtz and Sirgy 2017). In developing countries, endogenous factors include the social matrix, characterized by deeply rooted resource insufficiencies and weak regulation (e.g., Burgess and Steenkamp 2006; Sheth 2011). This uncertainty shapes the marketing system toward informal commerce only among trusted friends and family (Viswanathan, Rosa and Ruth 2010). Exogenous factors include recessions, war, policy shifts and catastrophes that force market systems constituents to adapt, sometimes abruptly, with mixed results.

**Methodology**

This study extends our understating of the transformative factors operating within the marketing systems of Medellin, Colombia. Using a multimethod approach, we analyzed the factors influencing the transition of this under-served and often violence-riddled community to a thriving, economically viable region.

First, ethnographic research provided insights about the unique characteristics and historical development of its marketing systems, along with observation of commercial activity and retailer interaction. Second, five interviews with city leaders (e.g. the major secretary of economic development) provided information about the variety of public investments in the city’s marketing system in the last 10 years. Third, 50 structured interviews with residents, utilizing an interview protocol adapted from QoL research within developing economies (Nguyen, Rahtz, and Shultz 2014), provided retrospective assessment of QoL changes for themselves, for their families, and for the community at large. Finally, analysis of policy documents and public records provided objective measures of QoL (Peterson 2006) to contrast with the sources of self-reported information previously described.

**Preliminary Results**

Preliminary findings from field observations, structured interviews, and secondary information indicate that marketing-system development was an important ingredient for overcoming Medellin’s distressed economic and social conditions during the 1990s. In terms of policy, the city’s leadership developed and implemented a strategic plan to globally expand and promote economic growth. Their approach to sustained revitalization is lauded as a ‘local development state’ model of economic development (cf. Bateman 2010).

In addition, public institutions developed an ambitious infrastructure plan targeted to economically depressed zones involving security improvement, market inclusion and community-infrastructure development (e.g., parks and libraries). For example, in “Comuna 13” a neighborhood with the record as the most violent zone in the city, a new transportation infrastructure involving a network of chair-lifts, “metro cable,” and an electric escalator 1,260 feet long, increased access to the poorer communities located in the city’s periphery, enhancing the marketing system’s reach and value to diverse members. Table 1 provides objective metrics of the city’s evolution.
<table>
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<th>Table 1. Objective QOL measures</th>
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<tr>
<td><strong>Health</strong></td>
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<td>Life expectancy</td>
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<td>Infant Mortality x 1000 born</td>
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<td>Health expenditure/ City GDP</td>
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<td><strong>Economy</strong></td>
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<td>GDP Growth</td>
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<td>Inflation</td>
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<td><strong>Infrastructure</strong></td>
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<td>Safe water access</td>
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<td><strong>Culture and Education</strong></td>
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<td>Literacy Rate</td>
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<td>Primary school enrollment</td>
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<td>Secondary school enrollment</td>
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<td>Museums</td>
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<td><strong>Environment</strong></td>
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<td>Population Density (&gt; Km2)</td>
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<td>Greenhouse Gas Emissions (CO2)</td>
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The economic improvements presented in Table 1 are mirrored in residents’ self-reported QoL for themselves, for their families, and for their community. Perceptions are assessed at four points in time (10 years ago, 5 years ago, currently, and 5 years in the future). Table 2 provides these self-reported past, present and future QoL perceptions.
Table 2. Self-reported QOL Measures

<table>
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<th>QOL</th>
<th>Community</th>
<th>Family and Friends</th>
<th>Personal</th>
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<tr>
<td></td>
<td>Mean</td>
<td>SD</td>
<td>Mean</td>
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<tr>
<td>Past (10 years)</td>
<td>6.40</td>
<td>1.81</td>
<td>6.62</td>
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<tr>
<td>Past (5 years)</td>
<td>6.60</td>
<td>1.73</td>
<td>7.04</td>
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<tr>
<td>Current</td>
<td>7.22</td>
<td>2.00</td>
<td>7.38</td>
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<tr>
<td>Future (5 years)</td>
<td>8.22</td>
<td>1.69</td>
<td>8.63</td>
</tr>
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QoL perceptions are rated on a 1-10 scale.

Residents’ responses to open-ended survey questions reveal the elements they believe have had the greatest impact on Medellin’s positive evolution:

1) Infrastructure development (35%). This domain can be understood as investments in logistical infrastructure such as roads and transportation systems, versus social infrastructure such as parks and libraries.

2) Security (33%). Respondents mentioned significant events such as the killing of Pablo Escobar and other drug lords on the region, and the overall increase in number of police officers in the city.

3) Education (19%). Respondents mentioned several new educational and cultural programs developed in the city which served to promote new business innovation and in turn more jobs.

Assessment of these data in terms of dynamic policy changes, interactions within the marketing system and ultimate impact on citizens’ QOL are in progress, as are thoughts on future directions for this stream of research.

Discussion

From a public policy perspective, policy choices affect the institutional settings that shape the efficiency of marketing systems. This in turn creates opportunities and threats to which market participants react. Truly constructive engagement and socioeconomic viability depends on an appropriate theory of marketing systems (Layton 2009; Shultz, Rahtz and Sirgy 2017).

Medellin, Colombia provides a case study for the transformation of a distressed community toward viability based upon critical improvements to market system components over time. We submit that a flourishing community is a recognizable assembly of people with shared values, cooperating to ensure clear evidence of positive physical, economic, environmental, and social well-being, which empower constituent members in their efforts to affect further prosocial outcomes for stakeholders of the community. To be considered flourishing, it must also have demonstrated a temporal sustainability of these domains and a capacity for continued growth and resiliency in these domains.

A distressed community, in contrast, is a recognizable assembly of people with actual or potentially shared values, that evinces the presence of recent, current, or imminent negative
states or occurrences in regards to the collective well-being in any or all physical, economic, environmental, or social domains that inhibit health and members’ empowerment to affect prosocial outcomes for stakeholders.

When completed, this research aims to contribute theoretical and practical insights to better understand the methods and mechanisms for continued positive transformation within Medellin, as well as other transitioning, developing and/or recovering communities.

References


The Influence of Impoverished Contexts on Activities Related to Sustainability in Marketing Systems

Stefanie Beninger

Abstract

Adopting an emergent and inductive research strategy based on a multiple case study research design, this research investigated the sustainability activities of six organizations active in impoverished contexts. The findings indicate that five unique contextual factors in the marketing systems of impoverished contexts – institutional gaps, lack of market offerings, lack of financial and tangible resources, dispersed populations, and low educational attainment – both challenge and facilitate organizations’ decisions and activities, with organizations’ using three strategies to overcome these challenges. The findings, relevant to scholars and practitioners alike, shed light on the complexities associated with pursuing sustainability initiatives in marketing systems in situations of poverty.
Victor Lebow: A Forgotten (or Perhaps Unknown) Pioneer in Critical Marketing

Raymond Benton, Jr., Professor Emeritus, Loyola University Chicago, Chicago, Illinois
U.S.A.

In what follows I introduce Victor Lebow and argue that he was a marketer. I will then indicate why I am interested in the work of Victor Lebow, explain what I mean by critical marketing, discuss the connection between critical marketing and macromarketing, and explain what I mean by culture. I then turn to Lebow and his contribution to critical marketing studies and to macromarketing.

As I will say below, to Lebow the question was how to modify, not abolish, the profit system such that enhanced social responsibilities will be incorporated in the very form and function of the business enterprise. Can minor accommodations satisfy the needs of these times? Can a democratic republic sworn to the Bill of Rights, exist and flourish under some alternative form of economic control (he was not advocating any form of socialism)? These are the questions and issues that occupied Victor Lebow.

Victor Lebow

Lebow is sometimes referred to as an economist (see, for example, Jensen 2015a, who refers to him as an economist and retail analyst). Given that he was born in 1902, his highest degree is most likely in economics (whether that be a bachelor’s, master’s or a Ph.D.), as is the case for many that self-identify as marketers today. His obituary in the New York Times (1980) is headlined “Victor Lebow, Marketing Official and Activist in Civil Rights…” and identified him as a former vice president of the Kayser-Roth Corporation (a hosiery and lingerie manufacturer and marketer formed in 1958 when Julius Kayser & Co. combined with the Chester H. Roth Company), and as a former director of Fabergé.

Lebow contributed at least two articles to the Journal of Marketing (1944, 1948). The first was titled “The Nature of Postwar Retail Competition” wherein the article by-line identified him as Sales Manager of the Chester H. Roth Company. The 1948 article was entitled “Our Changing Channels of Distribution,” and the by-line simply associated him with the Chester H. Roth Company. Lebow contributed at least once to the Journal of Business, a piece entitled “New Outlooks for Marketing” (1949). In a footnote to this article he was identified as the Vice President and General Sales Manager of the Chester H. Roth Co., Inc. He published several articles in the Journal of Retailing (1953, 1954, 1955, 1955/1956, 1957, 1957/1958, 1958/1959), the most famous of which is the 1955 piece entitled “Price Competition in 1955” wherein he was identified as “Marketing Consultant, President, Victor Lebow, Inc.”

Lebow was a frequent contributor of book reviews to The Progressive, Challenge Magazine, The Nation, and contributed to Harper’s Magazine (1945) and purportedly contributed to Printers’ Ink, Business Week, Advertising Age, and others. He published one book, “Free Enterprise”: The Opium of the American People (1972). The book’s by-line reports that he was co-chairman of the University Seminar on the Economics of Distribution at Columbia University.

As a businessman, an educator, a consultant, and as an author Victor Lebow was a marketer, perhaps a marketer with an economic outlook but a marketer nonetheless. He is a marketer few have likely heard of except, possibly, through an encounter with the following often quoted passage from the 1955 Journal of Retailing article (1955, pp. 7-8).
Our enormously productive economy demands that we make consumption our way of life, that we convert the buying and use of goods into rituals, that we seek our spiritual satisfactions, our ego satisfactions, in consumption... We need things consumed, burned up, worn out, replaced, and discarded at an ever increasing pace.

The complete passage, including eclipsed content, is in the Appendix to this paper.

I first encountered this passage while reading Stuart Ewen’s Captains of Consciousness (1976). Most recently I saw it in Father Jensen’s “The Consumer Conundrum” (2015a), author of The Cure for Consumerism (2015b). The passage is a staple of the anti-consumption community where it is frequently referenced and cited.

On occasion academics also reference and cite this passage. I have seen it, for example, in Peter Wenz’s environmental ethics textbook, Environmental Ethics Today (Wenz 2001). There is uncertainty as to whether Lebow was simply describing the prevalence of increased and increasing consumption or prescribing and thereby encouraging increased and increasing consumption. Wenz took Lebow's words to be prescriptive, “as a project of increasing consumption” (Wenz 2001, p. 240). My view is that the passage is present-centered (descriptive) but by no means celebratory (prescriptive).

**Why I am Interested in Victor Lebow**

I have recently developed a curiosity about lesser known marketers. In 2013 I presented a paper entitled “Galbraith and Glasser: Two Scotsmen – One Misunderstood and the Other Unknown” (Benton 2013). Ralph Glasser, author of Planned Marketing (1964) and The New High Priesthood: The Social, Ethical and Political Implications of a Marketing Oriented Society (1967), was the unknown; John Kenneth Galbraith was the misunderstood. Glasser was Scottish; Galbraith was of Scottish extraction. My initial interest was in exploring the parallels between Galbraith and Glasser for a track on “Marketing and Social Criticism before No Logo”. Eventually it dawned on me that the more interesting question dealt with Ralph Glasser’s transition between 1964 and 1968, between Planned Marketing, a straightforward textbook treatment of “how to do marketing,” and The New High Priesthood, an cautionary inquiry into what it is we are doing when we do marketing. It was, as I saw it, a transition from Glasser the apologist to Glasser critical thinker.

At one point I ran across Lebow’s only book, “Free Enterprise”: The Opium of the American People (the quotation marks are part of the title). The subtitle, itself, intrigued me.

It remains a question (not to be explored here) as to why Lebow’s work did not make more of an impact than it did. Not that it matters, of course. Brian Jones has made a career of writing biographical sketches about historical figures, mostly in marketing. He and Paula MacLean (McLean and Jones, 2007) wrote a piece about Edward Sherwood Mead, “a pioneer in finance education.” They noted that he received little academic recognition during his life and earned little fame and little reputation. Yet it seemed that he was still worth considering, and not only because he was the father of the better-known anthropologist, Margaret Mead. I will not, in this paper, speculate on why Lebow did not receive more recognition during his life than he did. I insist only that his failure to be recognized is not sufficient reason ignore him now.

**What is Meant by Critical Marketing?**

I have positioned Lebow as a pioneer in critical marketing. This raises the question, “What do I mean by a critical approach” to marketing. It is easiest to understand what I mean by appreciating what is meant by its opposite, a traditional approach. What I say here draws heavily from what I have previously written (Benton 1985a, pp. 201-202; see also Benton 1985b). It is also consistent with Murray and Ozanne (1991).
The traditional sciences of man and of society have attempted to follow the lead of the natural sciences (see, for example, Poirier 2011). There is little doubt that the various schools of economics, sociology, psychology, social psychology, political science and marketing have a similar if not identical conception of theory. It is the same conception of theory as in the natural sciences. This has been remarked upon often, but seldom as straight forward as by anthropologist Leslie White (1949, p. 6) when he wrote,

the basic assumptions and techniques which comprise the scientific way of interpreting reality are applicable equally to all of its phases, to the human-social, or cultural, as well as to the biological and the physical.

One of the basic assumptions underlying the scientific way of interpreting reality was expressed by Albert Einstein. “The belief in an external world independent of the perceiving subject,” he wrote, “is the basis of all natural science” (Einstein 1934, p. 60). Leon Eisenberg (1972, pp. 123-124) noted the difficulty with adopting the natural science perspective in the social field:

The planets will move as they always have, whether we adopt a geocentric or a heliocentric view of the heavens....[T]he motions of the planets are sublimely indifferent to our earthbound astronomy. But the behavior of men is not independent of the theories of human behavior that men adopt....What we choose to believe about the nature of man has social consequences.

It is from this recognition that a critical approach emerges. A critical approach recognizes that in the clothing and the outward appearances as well as in emotional forms and cognitive structures, people are the products of their history. The way people see and hear and feel and act is inseparable from the social life process. As far as any one individual is concerned, the basic conditions of existence are accepted as given and he or she simply strives to fulfill them. Most people, most of the time, find their satisfaction and praise in accomplishing, as well as they can, the tasks connected with their place in society and in courageously doing their duty, despite all the sharp criticism they may levy in particular matters and circumstances. Despite, that is, all the moaning and groaning we may on occasion engage in. This is true of the production line worker, the corporate executive, the housewife, the physicist, the behavioral scientist, the consumer research, and the macromarketer. To quote another anthropologist, Clifford Geertz, those that fail to go along with the moral-aesthetic norms of their society, those “who follow an incongruent style of life, are regarded not so much as evil as stupid, insensitive, unlearned, or mad” (Geertz 1973, p. 129).

That it is difficult to follow an incongruent style of life has, itself, often been noted. The 2018 film, Leave No Trace, directed by Debra Granik, based on a novel by Peter Rock (2009), itself based on a true story, explores how Viet Nam veterans, and those around them, cope with postcombat hypervigilance. It also illustrates how truly difficult it is for a father and his daughter to live an off-the-grid existence, to make life-choices that actively go against the society and social norms around them. In an interview Granik is quoted as saying,

It’s hard to live with less in a country that prizes more. It’s hard to build your identity with very little material wealth when in this country, a lot of the way we develop our self-esteem is based on how much we own, how much we earn.

(Jacobson 2018)

It is very hard to make life-choices, and to live those life-choices, when they go against the society and the social norms around you; this is as true of the Navaho or the Hopi, as it is of the American.
Critical Marketing and Macromarketing

How does a critical approach apply to or connect with macromarketing? Firat and Tadajewski (2009, pp. 132-133) attempted to answer that question, by pointing out that, according to the commentary at the time, macromarketing scholars take a more managerial perspective than those working from a critical marketing position, wanting to transform business practice for the better, or at least modify it in the face of social concern and legal criticism…For most macromarketers, the capitalist system and the economic doctrine of neoliberalism are largely accepted as improving the standard of living of most consumer in the world, without much criticism.

A critical approach is not concerned with a managerial perspective, it is not concerned with assisting those in control to better perform or even to transform their practice. (See Firat and Tadajewski 2009; Tadajewski 2010a; Tadajewski 2010b).

A critical stance focuses not only on the goals and rules of conduct imposed by existing ways of life but as well on people and all their potentialities. The aim of critical theory is always the emancipation of people from their chains of illusion, from their self-imposed slavery. The concepts which emerge under the influence of the critical mind are critical of the present and tend toward a certain philosophical and futuristic character because they are always mindful of alternative possibilities. Critical undertakings receive little, if any, sanction from so-called healthy human understanding. Having no established custom on their side, critical thinkers do not expect, and generally do not receive, a warm reception. Among the vast majority of the people there will be an unconscious fear that critical thought might show their painfully won adaptation to social reality to be perverse and unnecessary. Among those who profit from the status quo, there is a general suspicion of any intellectual independence. People who think “too much” are always regarded as dangerous. The paradigmatic example is, of course, Socrates.

In my view (pace Firat and Tadajewski), a critical approach to marketing can only connect with macromarketing; macromarketing is the natural home for any type of critical marketing scholarship. This is a topic, however, for another article.

What I Mean by Culture

This brings me to what I mean by culture, since this paper has been included in the session on “Markets, Marketing Systems, and Culture.”

culture (kūr'cher) n. 1.a. The totality of socially transmitted behavior patterns, arts, beliefs, institutions, and all other products of human work and thought characteristic of a community or population.

This is how my American Heritage Dictionary (1996, p. 454) defines the concept of culture. It is a restatement of E.B. Tylor’s 1871 definition (Tylor 1871, p. 1)

Culture is that complex whole which includes knowledge, belief, art, law, morals, customs, and any other capabilities and habits acquired by man as a member of society.

Culture is everything that man thinks and does and makes that is transmitted extra-genetically. Outside of stylistic preferences by particular authors this remains, today, the standard textbook definition of the concept of culture in anthropology.1 My bet is that it is something like what most of us have in mind when we use the term culture. It is not, however, what I mean when I use it. For me the word culture
denotes an historically transmitted pattern of meanings embodied in symbols, a system of inherited conceptions expressed in symbolic forms by means of which men communicate, perpetuate, and develop their knowledge about and their attitudes toward life (Geertz 1973, p. 89).

Culture constitutes “that intersubjective world of common understandings into which all human individuals are born, in which they pursue their separate careers, and which they leave persisting behind them after they die” (Geertz, 1973, p. 92). As such, culture is not a force or causal agent in the world, and it is not a collection of things made. It is a context in which people live out and give meaning to their lives (Geertz, 1973, p. 14).

In my plenary comments at the Macromarketing Conference in 2011 (Benton 2011), I drew on C.S. Lewis. The last sentence in his essay, “Is Theology Poetry” (1962), originally delivered before an Oxford debating society in 1944, reads:

I believe in Christianity as I believe that the sun has risen. Not only because I see it, but because by it I see everything else.

I drew on this passage so that I could substitute the word economics for the word Christianity. This gave me:

I believe in economics as I believe that the sun has risen. Not only because I see it, but because by it I see everything else.

My point was, and is, that every student in every class in the nation’s schools of business—indeed the world’s schools of business (although we do not need to limit it those in the schools of business)—sees economics everywhere and by it they see everything else. In short, economics is a cultural system (Benton 1982, 1986, 1990), “an historically transmitted pattern of meanings embodied in symbols” by means of which we “communicate, perpetuate, and develop [our] knowledge about and [our] attitudes toward life.” Economics is a context in which we live out and give meaning to our lives. It is one system of symbols (the material vehicles of thought—words (spoken and written), gestures, drawings, rituals, tools, sounds, markings and images)—and meanings (ideas, concepts, values, expressive forms) in terms of which we define our world, interpret our experiences, express our feelings, make our judgments, and guide our actions.

Meanings can only be stored in and transmitted by symbols: “a cross, a crescent, or a feathered serpent” (Geertz 1973, p. 127). To get directly to my point, the cross can be a Latin Cross, a Maltese Cross, or a Marshallian Cross—a point I have made before (Benton 1982, 2011, 2014).
There are many symbols involved, metaphors if you please, many of them taken from non-economic spheres: production functions, business cycles, elasticity, depression, equilibrium. “The metaphorical content of these ideas was alive to its nineteenth-century inventors. It is largely dead to its twentieth-century users, but deadness does not eliminate the metaphorical element” (McCloskey 1985, p. 76, 79).

Another such symbol is the word market, itself. The market is a metaphor for a host of values, beliefs, institutions, psychological assumptions, and political orientations. When marketers, even macromarketers, use the term they let those values, beliefs, institutions, psychological assumptions, and political orientations creep into their analysis and their discourse, whether they intend to do so or not. By constantly using the term market, whether alone or imbedded in other terms (marketing, marketing system, macromarketing) we unwittingly (unwittingly because the market as a metaphor is largely a dead metaphor) give the high ground to marketing-of-the-micro-variety and to mainstream, neoclassical, neoliberal economics. Layton (2007) suggested that marketing systems is a core macromarketing concept, defining “marketing systems” as “the networked structures and the assortments generated that emerge from voluntary exchanges between sellers and buyers” (Layton 2009, p. 415). As such he takes a page directly from the mainstream, neoclassical, neoliberal playbook. It is to those traditions that the market (read: voluntary exchanges between sellers and buyers) as a metaphor, and its variations, is grounded. It is to this that Firat and Tadajewski drew our attention when they wrote, “Marketing … is founded on the existence and workings of the market; its name betrays it” (2009, p. 140).

My plenary remarks ended by suggesting that as macromarketers we need a new metaphor, a different metaphor, by which to organize our thoughts. Until we find it, we need to stop using the dead metaphor of the market as our central organizing metaphor. Until we find a replacement, and here, perhaps, is where a critical approach can help, we need to at least be conscious of the metaphorical nature of the thoughts we pursue, which means we need to be conscious of the political aspects of the metaphors we use to pursue those thoughts. Until we find a replacement, macromarketing will continue to have a more managerial perspective than those working from a critical marketing orientation.

**Returning to Victor Lebow**

“Free Enterprise”: The Opium of the American People (1972) is Lebow’s only book. It is comprised of two parts: a description of The Business System, and his recommendations for correcting the manifest flaws. That “Free Enterprise” is in quotes suggests that he is writing about the so-called free enterprise system.

Lebow’s audience for “Free Enterprise” was the college student of the 1960s and 1970s “upon whom will fall the responsibility for transforming the country by the year 2000” (from the dedication). It was a period of great hope for some, and great fear for others. Lebow held out reserved hope. For that hope to be realized, he argued, college students had to develop a much better understanding of how the American business system really worked. Much is hidden from view by the rhetoric of free enterprise, by the rhetoric of the market (and of marketing) (Benton 1987, 2011). Hence, his subtitle, “The Opium of the American People.”

To extend the metaphor, opiates, Lebow would have agreed, fail to fix the ills of the macromarketing system. They let one forget the pain and suffering rather than work to change the circumstances causing the pain and suffering. Worse still, the drug is administered by the oppressors, those responsible for the pain and suffering. Lebow would have agreed with Nancy MacLean (2017, p. xxviii) when she recently wrote (in an entirely different context),
Americans have been told for so long, from so many quarters, that political
debate can be broken down into conservative versus liberal, pro-market versus
pro-government, Republican versus Democrat, that it is hard to recognize that
something more confounding is afoot, [something that is] blocked from our sight
by these stale classifications.

As Americans, Lebow would have said that we have told ourselves for so long that our choice
is either markets (free enterprise) or government that it is hard to recognize that something
more confounding is afoot. Our continued reliance on the rhetoric of free enterprise and of the
market (and associated expressions involving the market—such as Eric Shaw’s “free marketing
economy” (2011, emphasis added)—blocks that something “more confounding” from our
view. Lebow would also have agreed with MacLean that “we have an urgent need for more
open and probing discussion, not silencing” (2017, p. xxxi).

Lebow wrote “Free Enterprise” to pull back the curtains and expose a more accurate depiction
of the American business system than the image that is conjured by our use of symbolic
expressions like free enterprise, the free market economy; the market; marketing (much less
free marketing) or even macromarketing. The first seven chapters are descriptions of how the
system works; the last four are his proposals for the future.

**Problems in the Macromarketing System**

Lebow saw and was concerned about injustice, poverty, and lack of health care. He enumerates,
in several places, where he feels the macromarketing system fails us. Millions go hungry, infant
mortality is high, we waste and pollute more than many countries with much larger populations,
we need more and better housing, we need more and better schools, we need more and better
health care, we have high and increasing disparities in wealth and income. We lack efficient
mass transportation but get more highways, and more jet ports, while mile after mile of railroad
right-of-way is demolished.

He recognizes that we receive benefits from the system. “Only the ignorant and the dogmatists”
would deny private enterprises’ role in the building of the United States.

> The enterprise, the risk taking, the managerial ability, the imagination, the feel
for the main chance, … have animated American business for almost two
centuries [and] are, by any fair judgement, positive assets on the balance sheet
of America” (Lebow 1972, p. 13).

> “Opera, ballet and symphony orchestras,” he adds, “simply couldn’t exist on today’s scale
without subsidies from business” (Lebow 1972, p. 113).

While the benefits we enjoy are always attributed to The Business System, to the market, to
free enterprise, the profit system, the deficiencies are not. Deficiencies are attributed to
“foreigners, Negros, Puerto Ricans, Mexicans, Republicans, Democrats, labor unions,
professors, agitators, subversives” (Lebow 1972, p. 17). Deficiencies are sometimes also
attributed to “state administrations, …the Congress, or the incumbent national government”
(Lebow 1972, p. 111). Business as an institution, as a system, “has been a sacred cow, exempt
from criticism, and even from objective study” (Lebow 1972, p. 111).

Lebow was in no mood to assume that all the lingering problems are due to the suggested
sources; neither was he willing to assume that all the problems can be solved by business, even
by businesses that professed a social responsibility. But neither was he in favor of any kind of
socialist form of control. “The sanctity of private property is well established in the
constitution,” he wrote, and it has been “reaffirmed by the supreme court” (Lebow 1972, p.
129). He had no intention and no desire to challenge that.
Understanding the American Business System: Its power, influence and ubiquitousness. But we must come to see and to understand how and to what degree society is dominated, formed and shaped by business. The United States is the only nation in history founded by corporations, the British colonies in North America having been originally conceived as commercial ventures (Lebow 1972, p. 29). The corporation is the dominant, most powerful and most pervasive institution in the whole system (Lebow 1972, p. 30). “It is the empire which actually rules this country and most of the non-communist world” (Lebow 1972, p. 31).

It is not easy to grasp how pervasive business is. Most Americans are unaware of the extent to which business, as an institution, totally envelops them, “as the air in which [they] move and breath” (Lebow 1972, p. 16). The closest analogy to this “ubiquity of business today would be the presence, power, and persuasion of the Roman Catholic Church during the medieval age in Europe” (Lebow 1972, p. 16).

Our values, goals, priorities, and ethics mirror those of business. The accomplishments and beneficences are well publicized and credited to The System. It is The System that gives us what we have. Yet problems continue to plague us, and not a week passes that some businessman or corporation isn’t cited, indicted or convicted of one chicanery or another. But for the evil that is done, or the problems that remain, the finger of guilt is pointed to the specific individual indicted or convicted, or to one on the endless list of scapegoats. The one institution “which is exempt from criticism or blame is the profit system, business, itself” (Lebow 1972, p. 17).

How things are different today (today being the 1970s) is in the nature of the system and the extent of its power. It is, today, a “system of power” (Lebow 1972, p. 4, citing Brady 1943). It is a system of power “entrenched behind concentric fortifications of special interests, political parties, and unquestioning faith of generations of Americans in the superiority of our way of life” (Lebow 1972, p. 4).

The Establishment, the Bureaucracy, the Politicians, the Power Structures, the Pressure Groups, are all satellites whose existence and strength depend upon the heartland of “The System,” the institution which is variously called Private Enterprise, or The Profit System, or Capitalism—in short, Business (pp. 4-5).


“There are two business systems in the United States,” one made up of “corporations with national or international operations” and the other “populated with comparatively small enterprises, most of them local” (Lebow 1972, p. 23). This duality is present in other countries, too. Writing at the time that the Japanese management system was considered a miracle, Bunge and Whitaker observed (1983, p. 149),

The consequences of Japan’s economic growth have not always been positive. Large-scale and modern industrial enterprises exist side by side with the smaller and technologically less developed firms, creating a condition of economic dualism.

Similarly, writing about the time that Lebow was writing, Bieda suggested (1970, p. 202),

It is probably that there are very few countries that would not show features of dualism as Japan does. The main reason why most countries do not claim a dual structure is that they do not have nearly as much statistical data about their economies as Japan.
This duality needs to be understood, to be fully appreciated, and not brushed aside. And it needs to be incorporated into our macromarketing models.

Understanding the American Business System: Its Impact Upon Society. The impact of business on society has taken two forms. “The first,” Lebow asserts, “is the virtual monopolization of science and technology by private enterprise. The second is the special character and volume of its propaganda” (Lebow 1972, p. 5). The first derives from businesses passion for innovation which loosens upon the public “a flood of new products and services.” This is supported “by an overwhelming use of propaganda to induce acceptance” of the flood of new product and services (Lebow 1972, p. 5). In a discussion reminiscent of John Kenneth Galbraith (1967) and others, Lebow notes, “The new and improved uses of propaganda take the form of direct manipulation of the desires, opinions, values, goals, and ideas of Americans through the techniques of publicity, public relations, and advertising” (Lebow 1972, p. 6). The end result, he suggests, is that “Americans have been conditioned for gullibility” (Lebow 1972, p. 6).

One of the significant accomplishments of the public relations fraternity has been to implant into American heads the slogan of “Free Enterprise.” Lebow suggests the phrase is “the fraudulent marriage” of two terms used in economics. The first is “free competition”—of which there has never been much, and now is practically none of consequence. The second is the definition of this economic system as “private enterprise” (Lebow 1972, p. 68). In this context, the more recent work by Fones-Wolf (1994) and by Stole (2016) is central. Worth noting is that the 1977 CPAC2 conference included either a panel or a session on “Marketing Free Enterprise” (Parker 2015, p. 226). I think Lebow would have reacted to these works by saying, I told you so.

What the American people experience is propaganda so pervasive, so persistent, so enduring from cradle-to-grave, that it is not only total but totalitarian. For in its working it shapes the desires, forms the values, sets the goals, of the citizen-consumer. (Lebow 1972, p. 69)

“Considered objectively, one must credit the propaganda of our private enterprise system with three imposing achievements: First, [it has] transformed the American citizen into a compulsive consumer whereby Consumption has become synonymous with democracy. Second, [it has] persuaded Americans that business is the living heart of democracy… Third, [it has] succeeded in making Americans believe that politicians are independent of business…” (Lebow 1972, pp. 81-83).

Understanding the American Business System: The Impossibility of Social Responsibility of Business. Lebow notes that the “middle class intellectual,” faced with the dissent, the despair, and the violence of the day, “is calling for the assumption by private enterprise of social responsibility” (Lebow 1972, pp. 6-7). The plain fact is that “any business decision made solely in consideration of the common good is, per se, a bad business decision” (Lebow 1972, p. 8, emphasis added). It is bad “because it reduces profits, and if it does benefit society it must be a by-product of an otherwise ‘good’ business decision” (Lebow 1972, p. 8). Every businessman knows this; no businessman needed “the imprimatur of Professor Milton Friedman” (Lebow 1972, p. 8). Here Lebow was expressing what Fred C. Hanley, president of Fred Hanley Poultry Farms, Inc., reportedly said (on the January 1974 cover of Poultry Tribune), “The object of producing eggs is to make money. When we forget this objective, we have forgotten what it is all about.”

Yet there is need for business to have a social responsibility. The question is how to modify, not abolish, the profit system such that “its social responsibilities will be incorporated in its
very form and function” (Lebow 1972, p. 13). Can minor accommodations satisfy the needs of these times? Can a democratic republic sworn to the Bill of Rights, exist and flourish under some alternative form of economic control? To these questions he returns in the final chapter. Lebow argues that the changes our country must undergo, in order to flourish in a peaceful world, cannot be achieved without a radical restructuring of that system of power which is Business. “Change is on the order of the day, all over the world … But change in what direction? There are powerful forces … which would look with favor upon a transition to a more … authoritarian government,” and among them “are many businessmen” (Lebow 1972, p. 12). No matter how altered, how changed, “that system must retain the energy and the capabilities of American private enterprise” (Lebow 1972, p. 13).

Understanding the American Business System: The Satellites and Surrogates. In his effort to expose The Business System as it is, he more fully develops the structure of The System by discussing how the various and numerous bureaucracies serve The System (Chapter 6). Lebow does not stop at pointing out that big, corporate business is not simply small, domestic, owner-managed enterprises writ large. They are beasts of a different nature, ones in which we are all, one way or another, entwined. But the Business System is more than an accumulation of corporate enterprises. It is, as well, a system comprised of corporate enterprises buttressed by an array of bureaucracies, and we must fully understand (but do not) the nature, purpose and functioning of these bureaucracies. No matter what their ostensible reason for being, these bureaucracies serve private enterprise, especially corporate enterprise; “their function is to protect it and defend it against all enemies foreign and domestic” (Lebow 1972, p. 85).

This “array of bureaucracies” exist as satellite systems, revolving about the dominant and most powerful system of all, that of corporate business. Taken together, the giant corporations and their satellites “determine the character, values, goals and priorities of this society” (Lebow 1972, p. 85). Examples of these satellite systems discussed by Lebow include the American Medical Association, the National Rifle Association, and the American Farm Bureau Federation, an organization, he writes, that “has proclaimed itself the voice of the farmer, but in fact it represents the largest, wealthiest and most influential farm operators, bankers, machinery and agricultural supply manufacturers” (Lebow 1972, p. 87). Add to that its stranglehold on “the Department of Agriculture, its influence with county agents, its cozy partnership with all the forces which help keep [the poor farmer] in penury” (Lebow 1972, p. 87).

To these and others like them he adds the various trade organizations, most labor organizations, the United States Chamber of Commerce, the National Association of Manufacturers, and hundreds of others (including the American Legion, the VFW, the Navy League, the Air Force Association, the Daughters of the American Revolution, the Minutemen, and the John Birch Society). “All of these,” Lebow writes, “are satellites of business because they are committed to the private enterprise economy, to the profit system, and because their existence and power are predicated upon the continued dominion of business in our society” (Lebow 1972, p. 88). A typical satellite system “combines organization, wealth, propaganda, the power to benefit its constituents and to punish its opponents, and often the ability to impose discipline and penalties upon the recalcitrant” (Lebow 1972, p. 86).

To really understand the macromarketing system, one must also understand and model these satellite systems whose lobbyists constitute a ‘shadow’ Congress, providing advice, guidance, largesse, junkets, and importunity for the elected members of the House and Senate, as
well as those in the State legislatures and administrations, and reaching the ears of strategically placed officials in the executive branch (Lebow 1972, p. 87).

The Proposed Solutions

Solutions: Take up a Career in Business. He observes that his audience, “the dissident young people, particularly those in the colleges and universities,” are rejecting The System. One form this rejection takes is the repudiation of business as a career (Lebow 1972, p. 111). He encourages them to reconsider that stance and to actually consider a career in business:

for the healthy development of the economy and of the society as a whole, it is important that some of these brilliant and idealistic rebels seek out careers in private enterprise (Lebow 1972, p. 111).

They may, after all, “play a role in the transformation that is bound to come” (Lebow 1972, p. 112). It is necessary that “these brilliant and idealistic rebels” seek careers in business (Lebow 1972, p. 118):

a business career is probably the most important vocation on which a college man or woman can embark. Their role in the decades ahead may do as much to decide the future of the world as government officials, university professors, scientists, or the military.

Solutions: Full-Scale Interdisciplinary Study. While no one can deny the primacy of business in American life, it is important to realize that “no university has made the private enterprise system the subject of a full-scale interdisciplinary project” (Lebow 1972, p. 119). Since “practically every student in the university is going to spend his adult life either immersed in business or encircled by it” (Lebow 1972, p. 119), it only makes sense that such a full-scale interdisciplinary research and teaching effort would take place and be of interest. Such an interdisciplinary activity would include History, Government, Philosophy, Economics, Social Anthropology, Sociology, Ethics, International Relations, Education, Science, Ecology, Social Science. His suggestions for what each of these disciplines might investigate leads to the following conclusion (Lebow 1972, p. 122):

[S]chools of business do not begin to teach their students what business is. They are vocational schools. They have fancied up courses in techniques and practice to masquerade as kissing cousins to the academic curriculum.

This, too, will sound vaguely familiar to those that have read Bloom’s The Closing of the American Mind (Bloom 1987). Lebow then lists a few more: Psychology, English Literature, Creative Writing, and Social Problems. He then concludes (Lebow 1972, p. 123):

Calvin Coolidge once put it bluntly: “The business of America is Business.” All the more reason why every student in our colleges and universities should learn all there is to know about private enterprise.

By that he intends they should learn all there is about private enterprise as it really is and not as myth would have it.

Solutions: The Form of the Firm. The penultimate chapter is devoted to a discussion of the social costs of business—costs which are enormous and which few scholars have attempted to assess (he cites K. William Kapp’s The Social Costs of Private Enterprise (1950) as a possible exception). The point of this discussion is to provide the background and vocabulary for the final chapter.

“The private enterprise system has imposed [and continues to impose] a huge withholding tax on the American people. That tax is the social cost of business, the contribution of society to the success of private enterprise. And that
contribution is an unpaid debt” (pp. 130-131). It is time that the system of private enterprise begins to repay that debt. It is not necessary to destroy the system, nor to expropriate its holdings, for business to restore to society what it has taken without compensation. Further, the society should insist upon encouraging and retaining the managerial skills, the creative abilities which make American business so successful and so powerful. But the time has also come to make the control of private enterprise more democratic, more responsible to the needs of the American people” (Lebow 1972, p. 131).

“All this could be accomplished only under a new and different system of direction, priorities, and controls than is possible under the system of private direction” (Lebow 1972, p. 131). Most of the concerns today are negative externalities. “They are with us in large measure because it has not been anybody’s explicit business for foresee and anticipate them” (Lebow 1972, p. 132). These negative externalities “are traceable, less to some mystical autonomy presumed to lie in technology, and much more to the autonomy that our economic and political institutions grant to individual decision making” (Lebow 1972, p. 133).

Three “shibboleths” that must be discounted are that only a business-dominated society can work; that business raises itself, unaided, by its own bootstraps; and that private enterprise is a benign activity bearing no responsibility for the nonfeasance or malfeasance of politicians (Lebow 1972, p. 133). In addition, “It is so much poppycock to say that only private enterprise can be efficient. Actually, there is an enormous amount of waste and feather-bedding in business” (Lebow 1972, p. 134).

The Ingredients for a Solution. Lebow suggests that in the U.S. we have successfully created one form of corporation which has proven well suited to undertake the functions of a business enterprise yet differs from corporate private enterprise in that its social responsibility is the essence of its charter, is built into its structure. Lebow draws our attention to “the public authority,” of which the Tennessee Valley Authority is but one example. There are others. “There are authorities which build speedways and parks, bridges and housing, mass transportation facilities, and others which operate resorts, and such unique functions as those of the Saratoga Springs Authority, of New York State, with its hotel, spa, and a going business in the bottling and sale of its mineral waters. Lebow’s proposition is that the public authority form of corporation “may well be the device by which the transformation of the private enterprise system can be achieved.” Change can be gradual, but the motivation is clear: a special levy on all business to repay to the people the contributions which this society has made to every private enterprise operating under charter or license from any city, state, or the Federal Government. That levy should take the form of a Social Dividend, paid annually.

Tying his proposal to Tax Day (April 15th), Lebow proposed that every corporation shall issue a special Social Dividend (he proposes three percent) of all its outstanding common stock and its residual securities (securities that can be converted into common stock). This special Social Dividend shall be delivered, by each corporation, to a specific public authority (possibly one authority to be assigned to each industry). In a point of irony Lebow suggests each industry could pay its Social Dividend to an authority dedicated to the project which that industry has lobbied against. For example, a public authority devoted to the extension and improvement of mass transportation would receive its share of the total Social Dividend from the automobile manufacturers, truck manufacturers, trucking companies, cement makers, highway builders, and steel.
Well before the end of the century (that is, within thirty years of his writing) public authorities will have achieved a controlling voice in every corporation. The public authorities would utilize their share of the cash dividends paid on the stocks they receive as Social Dividends for planned and socially useful purposes. These would include all the areas in which we are remiss, lagging, or ineffectual today. In addition, there would be authorities to build, staff, and operate research and development laboratories.

Each public authority will have and will exercise its rights to nominate and vote for directors, express its opinions regarding the operations of the corporation, and pay particular attention to the propaganda activities of the company.

There is evidence, Lebow admits, that some public authorities can and have become so completely autonomous as to disregard the needs of the public they were designed to serve. This can be avoided by establishing a proportion of public members in each authority whose function it would be to keep its operation on the plan for which it was designated.

Conclusions

Lebow, the marketing professional, the businessman, attempted to demonstrate that the American corporation is unable to deal with the problems it has created for our society and that it is foolish to propose, as a fix, that those corporations adopt “social responsibility.” Those corporations owe an enormous debt to society and the repayment of that debt, as a means of funding Public Authorities, may be (Lebow’s words) a way forward.

How is this a matter for Macromarketers? If the gradual move away from the corporation as we know it were to take place, changes in the macromarketing system would unquestionably result. Macromarketers ought not be thinking only of the macromarketing system as it is, much less as myth would have it, but as the macromarketing system might be, as it could be.

There are complex debates taking place about the corporation, the form of the firm, and whether or not profit maximization for shareholders is really the end-goal (Green 2018, Macey 2008, Rhee 2017, Stout 2008). As we now know, the ability of financial providers to shape the marketplace and encourage ever higher levels of consumer debt, ruining many people and fracturing the global economy, has underscored that the consumer is not the powerful actor that marketing theory and consumer research often assumes, but is, rather, frequently subject to the market-shaping activities of corporate capitalism. That the form of the firm has market-shaping impacts is underappreciated in macromarketing.

Similarly, Lebow has proposed that the macromarketing system is shaped in complex ways that we might fail to fully appreciate. The focus and concern on the values of consumers, without paying attention to the impact of how the economy has developed and evolved is misguided. So, too, it is misguided to focus on the values and lifestyles of consumers without paying attention to the form of the firm that influences those values and lifestyles.

Notes

1 Over the years the major theoretical discussions in anthropology centered less on what culture is than on how it is best studied. Thus, anthropology has traveled down the evolutionists', the historicists', the functionalists' and the adaptationalists' roads. All the while the concept of culture, itself, has remained stubbornly fixed as Tylor’s original concept of “a complex whole” (See Keesing 1974; Ortner 1984).

2 Conservative Political Action Committee, or Conference.

3 This expression, the form of the firm, is borrowed from Abraham Singer’s The Form of the Firm: A Normative Political Theory of the Corporation (2018).
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Appendix

The following presents Victor Lebow’s most famous words from the 1955 Journal of Retailing article. The boldface portions indicate what is usually quoted and what I quoted in the body of this paper.

Our enormously productive economy demands that we make consumption our way of life, that we convert the buying and use of goods into rituals, that we seek our spiritual satisfactions, our ego satisfactions, in consumption. The measure of social status, of social acceptance, of prestige, is now to be found in our consumption patterns. The very meaning and significance of our lives is today expressed in consumption terms. The greater the pressures upon the individual to conform to safe and accepted social standards, the more does he tend to express his aspirations and his individuality in terms of what he wears, drives eats—his home, his car, his patterns of food serving, his hobbies.

These commodities and services must be offered to the consumer with a special urgency. We require not only “forced draft” consumption, but “expensive” consumption as well. We need things consumed, burned up, worn out, replaced, and discarded at an ever increasing pace. We need to have people eat, drink, dress, ride, live, with ever more complicated and, therefore constantly more expensive consumption. The home power tools and the whole “do-it-yourself” movement are excellent examples of “expensive” consumption.
Marketplace Mythologies in Finnish Energy Governance
Petra Berg, School of Marketing and Communication, University of Vaasa, Finland

Abstract
Climate change and loss of biodiversity represents complex, systems-level challenges for humanity. Central for solving these issues is the globally ongoing energy transition away from fossil fuels towards clean, sustainable energy sources and technologies. Still, the transition towards zero emission societies is not fast enough according to recent report by Rockström et al (2017) and the IPCC calling for “rapid, far-reaching and unprecedented changes in all aspects of society”. To be able to theorize about “why” the pace of the energy transition is still too slow even though technological solutions are in place Painuly (2001), we need to look deeper into the forces affecting pathways towards sustainability.

This paper explores energy pathway’s shaping dynamics in the context of the Finnish energy marketing system (Layton 2011). By analyzing discourses about (renewable) energy goals, produced by individuals in their roles of macro, governance-level actors it unveils dominant visions and so called marketplace mythologies (Thompson 2004) from the “top-down perspective” in the Finnish energy transition. It participates in the sustainability transitions discussion (Markard et al. 2012) by exploring how culturally inscribed belief systems, embedded in society’s dominant social paradigm (Kilbourne et al. 1997) and expressed by individuals with power, might affect the choices of pathway(s) in transforming socio-technical systems. Thus, this approach follows the line of Haase et al. (2009) in considering the connection of path dependency theory and the concept of shared mental models, with special focus on the interplay between individual and collective mindsets. To elaborate on the question of ‘how individual action is oriented to the behavior of others’ (Haase et al. 2009:24) we follow how individual discourses draw from and construct marketplace mythologies (Giesler and Veresiu, 2014, Humphreys and Thompson, 2014).

The notion of path dependency and lock-in becomes highlighted as literally all energy-economic processes depend on the existing socio-technical systems (Markard et al 2012). The embeddedness of established technologies into user practices, business models, value chains, regulations, and institutional as well as political structures creates a situation where changes are rather incremental than radical. Earlier research on barriers to diffusion and adoption of renewable energy identifies key institutional, non-technological factors such as the lack of stable institutions (Negro et al 2012),-stable long term energy planning (Elefthearidis and Anagnostopolou 2015), -cohesive and integrated policy (Michalena and Hills 2102) and cost (Painuly 2001). It is argued that the existence of strong path dependencies (Sung and Park 2018) slows down the pace of energy transition too much to be able to solve the sustainability challenges (Markard et al 2012).

Avoiding ‘unsustainable’ path dependencies calls for reflexive modes of governance and planning processes (Smith and Stirling 2010). Still, these processes are usually included in traditional governance patterns where their orientation towards sustainability easily becomes superseded by dominant discourses about economic growth and competitiveness (Seras and Smith 2009). Recent research shows that government and markets are the strongest promoters of transition to renewable energy, whereas the traditional energy sector negatively and directly affects the transition. The public sector has an indirect influence by either supporting or challenging governance and interacting with the market (Sung and Park 2018). Thus, governmental actors, their belief’s systems and discourses about renewable energy have a strong influence on socio-technical transition.
Considering energy transition as ‘co-evolution of humans and technology’ with many possible future pathways, including complex webs of human and non-human factors (Sarrica et al., 2016) opens up space for exploring and creating more understanding about how dominant belief’s systems and paradigms might affect its dynamics. According to Kilbourne et al. (2009), transition towards greener society is challenged by the ways the dominant social paradigm (DSP) of Western societies, the main institutions and ideological structures, are built around corporate interests and material growth, overshadowing the ecological and social aspects of sustainability (Wisconti et al. 2015). As governance structures are embedded in, maintaining and maintained by the dominant institutions (economic, technological, political, organizational (ecocentric vs anthropocentric) and functional (cooperative vs competitive)) (Kilbourne et al. 2009, Kilbourne and Middlestaedt 2012), challenging and transforming an ‘unsustainable’ regimen becomes hard. Especially, if we consider that paradigm molds individual (also governmental actors) behavior to be consistent with its own, unique requirements tied to materialism (Varey 2012).

As so called ‘guiding visions’, pre-discourses regarding how things should be, are embedded in a socio-technical regimen they have a tendency to produce experts who “tend to reproduce and stabilize the status quo” (Späth and Rohracher 2010). Especially, as a common trait for energy systems in transition is a high degree of technology dependency, the beliefs in technology to solve problems and the trust in expert information plays an important role in directing behaviors (Verbong and Geels 2007, Kern and Smith 2008, Humphreys and Thompson 2014). Usually the information is received from federal advisories giving recommendations and undertaking measurements to minimize risks, the trustworthiness of this information is important to maintain the public trust.

With an interest for the underlying dynamics affecting path dependency (sustainable or unsustainable) in energy transitions, we analyze macro-level discourses produced by governmental actors, “how they talk about renewable energy”. Government includes actors in roles associated with states, governments, public agencies, politicians, policy-makers, bureaucrats, local governments and sub-governmental organizations (Sung and Park 2018). The data includes transcriptions from recordings of nationally important seminars, conferences and workshops where Finland’s renewable energy strategy and transition has been in focus. The transcriptions are from between 2013 – 2018 in which the Finnish energy transition has been actively discussed and the strategy shaped by government. The data is being analyzed during spring 2019.

The discourses by social actors in governmental roles are expected to reveal guiding visions and marketplace mythologies. Humphreys and Thompson (2014) follow a post structural perspective in their discourse analysis, positioning social actors and the way they talk about things into particular socio-cultural and institutional positions. This way, social actors are seen as constructing narratives that draw from a broader legacy of culturally established discourses and metaphors. Thus, the most pervasive discourses become marketplace mythologies, which might serve the agenda of government, setting the vision for ‘how things ought to be’. So, as these cultural archetypes (myths) are used to create distinctive marketplace mythologies that in their turn serve diverse and often competing ideological interests (Thompson 2004), they maintain (or challenge) the path dependency of a socio-technical system. More specifically, the post structural perspective helps uncover the mythic constructs circulating on the governance, macro-level in the Finnish energy market and to explore what belief system and dominant paradigm they draw from.

Key words: Marketplace mythologies, Power discourses, Renewable energy, Sustainability transitions, Path dependency
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Abstract

Algorithms tacitly guide our increasingly digital lives, but we hardly affirm their ubiquitous presence. Only a radical reorientation of the practical and ethical domains of critical theory can address such brazen technological insurgency. Firstly, I contextualize the urgency of the task by appeal to the neophyte school of critical marketing. For the empirical and political strands to begin filling in an otherwise deficient normative guidance, I follow Cass Sunstein’s lead. He presciently argues that the personalization algorithms used by contemporary digital marketing monoliths threaten the basic liberties of a republican democracy. Secondly, Horkheimer and Adorno’s concept of mimesis offers the best analytic prism for problematizing what it would be like to think and act like an algorithm. Thirdly, I turn to the contemporary quartet of Google, Amazon, Facebook, and Apple (GAFA) as taking on many of the domineering trends associated with the American mass culture industry. This will provide a more comprehensive casting of personalization algorithms as manifestations of the instrumental reason that first-generation critical theory warned against in reflecting on mass culture and racial polarization. As a concluding action step, developing the critical marketing conception of the reflexively defiant consumer, I appeal to David Berry’s notion of algorithmic iteracy.
Using Design Thinking to Understand the Transgender Consumer
Bridgette M. Braig, College of Business and Economics, Boise State University, Boise, USA

Introduction
This paper offers a unique pedagogical approach to integrating the social and emotional welfare of an under-served population into consumer/customer behavior courses. Rather than designing just a module in a course, the course incorporates a collaborative design thinking project with multiple deliverables across the semester. By using a multi-stage project, it enables the integration of a broad range of consumer/customer behavior processes and constructs in a macro social welfare or social justice context, while still developing actionable marketing recommendations. Hence, meta-ethical issues are taught and modeled through the still-pragmatic lens of building brands and businesses.

Learning objectives for the project focus on characterizing the mindset, needs, and motivations of a target audience segment of which the student is not likely to be a member. From a practical perspective, that objective fits the reality of most marketing jobs. Although soul-crushing to many undergrads, Red Bull, Chanel, and the NFL do not look to marketing major new hires to run their brands, so most students will spend their careers building businesses for which they themselves are not the target consumer. From a macromarketing perspective, the project teaches students to think empathetically, and therefore, more expansively about the role marketing plays in impacting lives. Further, the project has a block and tackle, executional marketing flavor to it, not just ethics, and therefore illustrates that social issues are business issues.

Case Situation
The project set up asks students to adopt the perspective of a hypothetical team at Target. The company has decided to define and execute a transgender consumer initiative. In order to do so, it needs to do a deep dive into transgender consumer segments to understand their unique needs and experiences before considering a full range of creative tactics and touchpoints to meet these needs. Also to consider as a strategic filter, is how proposed solutions to transgender consumer pain points might impact Target’s cisgender consumers as well as how the potential ideas align with the Target brand positioning.

A detailed case study was written to provide background information on:

- Digital transformation forces in retail and the competitive environment for Target
- Changing cultural norms around political ideology and LGBTQ attitudes
- Target’s positioning strategy and execution
- Impact of diversity and inclusivity on general business outcomes
- Transgender community statistics

Framework
The project proceeds across the stages of the classic Stanford-based design thinking framework, as laid out in Figure 1.
Empathy. The Gender Equity Center (GEC) at Boise State University noted that without a strong research background and understanding of the trans community, primary research interviews with trans people could cause harm. As a result, students are constrained to secondary research. The GEC also provided guidance on sources of data (e.g., National Center for Transgender Equality, Human Rights Campaign, ACLU) and documentaries and other self-produced videos. Through this extensive immersion in secondary source material provided in addition to research students conduct on their own, they collaborate in teams to understand and attempt to codify the transgender experience. The goal is to encourage students to connect to three transgender consumer segments (trans male, trans female, trans child) by unpacking the social, psychological, physical, and emotional context of the coming out, transitioning, and transitioned experience. Clearly an ambitious proposition, so students generally achieve varying degrees of depth and success in this regard. However, this customer immersion culminates in the development of personas for the three trans consumer segments.

To complete the Empathy stage, teams use the personas to ground them in a customer journey for each persona. Contemplating the entire “think/feel/do” experience as each persona pursued a shopping-related scenario results in detailed customer journey maps. Students map the following journeys for their trans consumer personas: trans male apparel shopping, trans child apparel shopping, trans female make up shopping. The maps capture both the think/feel/do on the part of the respective personas as well as the brand touchpoints the persona encountered in the store, online, and offline.

Design and Ideate. In this stage, teams analyze the journey maps to identify pain points. In the Stanford language, these are point of view statements, but the gist is the same. How to write a problem statement at a relatively high level in order to inspire creative, expansive thinking about how to solve? The goal is for student teams to discuss the journey maps (again, from the perspective of the persona that inspired them) to uncover the friction points, pain points, unmet needs, negative experiences, or barriers each persona faces in achieving their shopping goals. Following the development of problem statements, students can let loose creatively. Adopting a no-holds-barred approach to ideating potential solutions to the identified problem statements, students are encouraged to develop touchpoints across every possible opportunity. For example, shelf engagement, apps, influencer approaches, social media messaging, store section organization, selection of models, mannequin shapes, clothing tags, store signage, hiring
practices, inclusive language training, product innovation, product partnerships, etc. are all fair game. Students go big before narrowing and refining.

The deliverable for this stage is the set of problem statements and associated brainstormed solutions, outlined in as much detail as possible to set the stage for the next deliverable. Students have to submit the first deliverable again (with revisions as desired) to illustrate the progression of thinking and to keep them honest about the locus of the ideated possible solutions.

Prototype and Pilot Testing Plan. In the full design thinking process, the top solutions get prototyped, tested, refined, tested again, refined, etc. However, in the context of a semester-long course with other requirements, this stage is modified. Students select the top ideas and articulate a strategic justification that ideally speaks to why the idea makes sense for Target, not just the trans consumer the idea seeks to serve. They then develop a complete prototype plan, describing the idea in sufficient detail so as to be able to visualize what it looks like. This could include drawings, wireframes, storyboards, etc., but if the idea is to go into a pilot test, the prototype plan has to thoroughly depict the “what” of the test. This process of landing the plane turns students’ conceptual ideas into reality, and forces them to get literal and granular about execution.

The last step requires students to consider how to test the idea. They have to address in detail where, with whom, and how. This forces a consideration of all relevant stakeholders from whom Target may want feedback, likely including Target’s mass market cisgender audience. Additionally, students must determine the impact metrics. How will they measure the relative success of the touchpoint idea? Does the pilot test need different metrics for different stakeholders? This final step adds quantitative accountability to the creative process that produced their ideas.

Project Results

At the time of writing this initial write up of the project initiative, 103 students have begun the project. Planned impact measures include self-assessments of skills developed in addition to attitudes toward transgender people and support behaviors toward transgender people (Kattari, O’Connor, and Kattari 2018; Kanamori, et al. 2017). An open-ended question about what students personally got out of the project, if anything, will also be administered.

Grounding the Transgender Project in the Marketing Education Literature

The section that follows briefly ground the complex approach of this project in the marketing education literature. Three major ideas or streams in this area informed the ultimate melding of design thinking, semester-long timeframe, and a focus on populations who regularly experience discrimination typically less visible to the privileged mainstream.

Bal et al. (2016) used a multi-phased, semester-long simulation requiring students to develop marketing communications re. suicide prevention. The suicide-prevention topic of their pedagogy focused on at-risk individuals, who share some of the same daily emotional stressors as marginalized population segments such as transgender people. The arc of their simulation approach also suggests that framing class projects as ‘deliverables’ models what students should expect to think through and produce for a real-life boss. Finally, the authors found that the real-world project enhanced students’ ability to apply concepts upon graduation, suggesting that a term-long project on an emotionally sensitive topic can build lasting skills in empathy and practical recommendations.

Precedent also exists for leveraging user-centered design and design-driven innovation to develop products in an in-class exercise. Chen et al. (2018) created an exercise that explored
the impact of focusing on the user vs. “radical aesthetics” on product design. While not design thinking in the classic sense that outlines a more prescribed framework of empathy and immersion, problem definition, ideations, prototyping, testing, and iteration, their in-class exercise demonstrated that a user-driven lens produced more useful product ideas than a radical aesthetics lens. Hence others have approached user-focus, the empathy-driven cornerstone of design thinking, in brainstorming to help students break out of assumptions and pre-existing beliefs to generate new innovations and ideas.

Finally, pursuing more of a straight up sensitivity-driven lens, Rosenbaum, Moraru, and Labrecque (2012) developed an in-class exercise designed to build awareness of discrimination. They found that exposure to scenarios in which an individual in a marginalized population could experience discrimination, resulted in an overall raised awareness level of discrimination in real life. Used in a services marketing course, their exercise focused on training and policy-related solutions to mitigate discrimination. The implication of this approach is that awareness of discrimination can be extended to richer concepts such as full lived experience of a marginalized group (e.g., transgender consumers) to have long-term impact on beliefs and behavior at both an individual and company level.

Situating the Transgender Consumer Project across Multiple Literatures

Several literatures justify the validity of and need for the transgender design thinking project. Further, the project and its intended impact should help address gaps in multiple literatures.

Existing Case Studies. Saks Fifth Avenue and the Transgender Consumer (Feddersen and Feddersen 2018) is the only transgender case listed on the Harvard Business Publishing Education site, the distributor for most of the major case-publishing schools (e.g., Darden, Harvard, Ivey, Kellog). Although it provides a rich background on legal precedents for protecting rights of transgender people and whether existing laws prohibit discrimination on the basis of gender identity, the case was designed for management and ethics discussions. As a result, it did not fit the goals for a comprehensive approach to consumer/customer behavior and macromarketing. An examination of the Journal of Case Studies archive, published by the Society for Case Research, did not reveal any that specifically address transgender consumers or issues associated with any LGBTQ population. Hence, from a straight-up substantive perspective, a gap exists.

The Self and Psychological Health. The psychology literature has studied the relationship between the true self and various outcomes, such as life happiness, self-esteem, and decision satisfaction (see Schlegel and Hicks 2011 for a review; also Heppner et al. 2008). The ability to tap into and honor one’s authentic self predicts a wide range of well-being indicators including mood and even physical manifestations. This research has not specifically extended notions of self authenticity to gender identity, although the findings certainly suggest the positive impact of being able to live a public and private life that aligns with one’s gender identity.

Marketing applications of these constructs have incorporated the use of brands and consumer identities in communicating the true self (Henderson and Rank-Christman 2016). Authors posit that “consumer environments and marketing appeals that address consumers’ true selves can result in a more positive consumption experience” (Henderson and Rank-Christman 2016, p. 151). Further, Bone, Christensen and William (2014) found that for minority consumers (blacks and Latinos), constraining choice had a negative impact on self-concept, self-esteem, self-autonomy, and self-efficacy. Taken together, this line of research and reasoning with minority consumers suggests similar deleterious hits to the self for transgender consumers when consumption encounters fail to respect or allow them to express their gender identity.
Hence, using empathy to characterize the transgender consumer may have positive, human and social impact if marketers can use this understanding to design better customer experiences.

Marketing and LGBTQ Consumers. Marketing explorations of LGBTQ issues focus more on gay and lesbian populations. Ginder and Byun’s (2015) extensive literature review of gay and lesbian literature found four meta themes: viability of gay and lesbian market, advertising-related issues around messaging to appeal to gay/lesbian market, straight and gay consumer response to advertising, and general consumer attitudes and behaviors of gays and lesbians toward brands. The review did not specifically reference transgender consumers. Transgender and non-binary people have received far less attention in the literature. Further, even among the more-studied gay and lesbian populations, Ginder and Byun found that the literature has not tended to focus on their consumption needs nor whether or how well the marketplace delivers on these needs (see Ginder and Byum, pp. 827-828), so existing research offers little on the relationship between LGBTQ self-identity and consumer expressions of identity.

A more recent paper studied transgender consumers specifically in the service of refining a model of consumer vulnerability (McKeage, Crosby, and Rittenburg 2018). Results from interviews with 24 transgender people revealed how marketplace conditions, such as the prevalence of binary gender representation in products and store layout, negatively impact genderqueer people’s ability to express their identity through consumption choices (e.g., clothing, cosmetics), which in turn, drives vulnerability. To the extent the project can highlight the damage that external forces can do in terms of vulnerability, students can learn to mitigate those macro-forces both as community members and fledgling marketers.

Finally, interpretivist work in the LGBTQ space has examined how the gay community’s shared history with some brands has imbued them with additional cultural meanings (Kates 2004). This finding points to the value of inclusivity to an individual brand. Controlling a brand’s point of entry into a community (gay or ostensibly, transgender) in a respectful, positive fashion that aligns with the brand’s intended positioning can facilitate both outreach to marginalized segments and also benefit from co-created, on-brand equities and associations that extend even beyond the marginalized or minority segment. This insight also suggests the broader impact of understanding the unique needs of a marginalized community beyond just selling more stuff. The benefits of learning how to serve a segment such as the transgender community may extend to the larger population as a whole in the form of socially meaningful brand associations. The current student project provides students an opportunity to apply this concept.

Proposed Contributions

The project makes several potential contributions to the marketing education and marketing and LGBTQ/diversity literature. In terms of marketing education, the project creates a semester-long opportunity, so relative to the in-class exercises in the literature, the current project is more fully co-created and collaborative on part of student teams. It also extends user and design notions by fully applying the now-commonly accepted full design thinking process. Further, by integrating a consumer-focused project across the entire course, the full breadth of consumer/customer behavior constructs can be applied.

The current project also extends sensitivity scenarios by unpacking the individual consumption experience to identify more specific touchpoints that detract from that experience and move to identify concrete actions to take to remedy. The implications will therefore move beyond employee training and policies in mitigating discrimination or removing negative encounters to a broader range of actions that will add positivity and benefits to the customer experience.
Finally, this student project also adds to the LGBTQ and diversity literature by explicitly examining the transgender consumer and exploring the role of gender identity in consumer experiences. Encouraging students to be reflective regarding how self-identity and consumer identity relate will make them both better marketers and more self-aware and empathetic humans.

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The Globalization of Culture: A Qualitative Study on Fashion Blogs as Soft Power Resources

Carolina de Oliveira Brandão, Universidade Federal do Rio de Janeiro
Pontifícia Universidade Católica do Rio de Janeiro

Roberta Dias Campos, Universidade Federal do Rio de Janeiro, COPPEAD

Marcus Wilcox Hemais, Pontifícia Universidade Católica do Rio de Janeiro

Abstract
The aim of this study is to understand how fashion blogs work as spreaders of culture, influencing consumers and acting as resources of Soft Power from the United States of America (USA) in Brazil. To achieve this objective, a qualitative research was conducted using Netnography as its main methodology. After a survey of the most influential Brazilian fashion blogs, the one of blogger Camila Coelho was chosen for a more specific analysis, with the aim of understanding how this blog was constructed, the cultural speeches that are spread through it and how the macro relations between States, in particular, of the USA and Brazil, are reflected through the micro relations created by social media. The analysis showed that blogs are an important means to reproduce relations of power within a macro level through the cultural messages spread by it.

Keywords: Globalization, Culture, Soft Power, Fashion Blogs, Social Media.
Moving beyond individuals: A practice theory approach to address unsustainable household water consumption

Lay Tyng Chan, Department of Marketing, Monash University, Malaysia

Introduction

Water scarcity is a pressing issue that currently affects nearly half of the world’s population. By 2050, around 5 billion people will not have sufficient clean, freshwater for their needs (Burek et al. 2016). The effects of climate change on water supply are exacerbated by increasing consumer demand pressures, particularly from personal and household cleaning practices. More frequent bathing, changing of clothes, and laundry cycles denote intensifying cleaning (Jack 2018; Shove 2003). Reducing consumer water usage is hence pivotal to ensure continuous supply of this essential resource, and social marketing has been helpful in this regard. However, consumer behavior change projects are dominated by economic and cognitive logic, assuming individuals will take rational decisions to reduce consumption based on knowledge and attitudes (Rundle-Thiele et al. 2019). Water conservation messages such as “fix that leaking tap” and “turn off the tap while brushing your teeth” are unlikely to be effective, because water usage is not a matter of individual choice. Rather, water is consumed unreflexively as part of mundane household routines, bounded by norms and cultural values. Consumption is hence ‘sticky’, and difficult to influence. Consequently, this research argues that a holistic approach is required, taking into account the interactions of institutions in the wider ecology of consumption.

Systems thinking and the practice theoretical approach

A growing interest in broader and deeper systems thinking addressing wicked problems has led to interest in macro-social marketing (Kennedy 2016), system social marketing (Domegan et al. 2016) and social macromarketing (Layton 2011; Tapp and Spotswood 2013; Truong, Saunders and Dong 2018). However, while systems social marketing has established the significance of systems thinking, contextual dimensions are conceptualized as “separate and distinct entities rather than entities that are interrelated, interactive and that dynamically influence on another” rather than integral to the system (Truong, Saunders and Dong 2018). Furthermore, most explanations of systems behavior do not employ a specific theory or model to guide their investigations, hindering the formation of a common understanding that drive systems change. This research aims to address these gaps by drawing on practice theory, which has been of increasing interest in macromarketing scholarship (Spotswood et al. 2017). A practice lens defocuses individuals by putting practice at the foreground of analysis: “…a routinised way in which bodies are moved, objects are handled, subjects are treated, things are described, and the world is understood” (Reckwitz 2002, 249). The empirical domain is household water consumption. The research aims to answer the questions “How are contemporary household cleaning practices formed? How do these practices relate to marketplace institutions?” Thereby, the research offers social marketers a holistic perspective of behaviors and thus potential interventions, based on multiple system aspects and levels, beyond the hierarchical conception of upstream and downstream.

This research draws on the tripartite model by Shove et al (2012): (1) meanings and representations, (2) objects, technologies and things; and (3) embodied competences, activities and ‘doing’. Adopting the practice lens, water consumption is conceptualized as a moment in cleaning practice, embedded in a complex context where meanings, things and doings are arranged in specific configuration (Warde 2005). Water consumption is thus a hidden cost of routine behavior directed at provisioning and caring for the house, and in particular,
maintaining desired levels of cleanliness. It is proposed that behavioral change can be achieved by interventions that address the links between elements of practice.

**Methodology**

This research derives from a multi-method ethnography in 10 middle-class Malaysian Chinese families living in Greater Kuala Lumpur, Malaysia. The researcher is a Malaysian Chinese, fluent in Chinese dialects, Mandarin, and English, enabling navigation and decoding of complex, nuanced and arcane household interactions. Participant observation of household routines was supplemented by in-depth interviews with family members most responsible for cooking and cleaning. Further understanding were obtained from images of cooking and cleaning action, household floor plans, non-participant observation of cleaning routines in public areas, and secondary data from media and advertising. More than 40 hours of immersion in the field over the course of 18 visits resulted 1848 minutes of audio recording, about 500 pages of interview transcripts and approximately 200 photographs. An iterative, hermeneutical approach was used to analyze this data as it helps to understand the way and conditions people make their actions (Moisander and Valtonen 2006). Following Thompson et al (1994), the analysis was a two stages part-to-whole iteration, first reading and re-reading the interviews to get a sense of the whole and then categorizing patterns across different participant narratives into sub-themes and themes.

**Preliminary findings**

Two major findings emerged: 1) the effects of exogenous market forces, and 2) the emergence of a new hygiene discourse. First, the effects of market forces within the broader socio-cultural environment were highlighted, giving rise to new norms and standards, which subsequently transformed household cleaning practices. Four external forces are identified: i) a prolonged period of disease outbreak for about 2 decades since 1990’s including cholera, Hand, Foot and Mouth Disease (HFMD), Severe Acute Respiratory Syndrome (SARS) and various strands of influenza (Ministry of Health Malaysia 2003; NikNadia et al. 2016; World Health Organization 2018), ii) rapid modernization and technological advancement following the introduction of Vision 2020 (Mohamad 1991), iii) advances in water infrastructure, and iv) increasing security measures in new housing developments, e.g., gated and guarded communities, combined with multiple security features in the home (locks, bolts, bars, alarms). These forces represent both exogenous shocks, causing previous integrating practice elements to become unstable and hence receptive to change, and slower trends, including more anxiety about safety and security. Marketers responded with stronger and more powerful cleaning products and disease-preventing household appliances (technologies). Additional rinsing, wiping and mopping activities (doings) promulgated by health institutions were aimed not merely aimed at dirt removal, but rather, to prevent a very real possibility of death through disease (meanings).

The second finding suggests that cleaning practices are locked in by reciprocal interactions between the market and consumers in a self-reinforcing hygiene discourse. The hygiene discourse establishes and reinforces the fundamental importance of cleaning practices in disease prevention, and acts as a control mechanism over the movement of objects from the market to private homes. The hygiene discourse organizes the Malaysian Chinese world into two parts: the “outside” world (dirty, uncontrollable, dangerous, imperfect and chaotic), and “our” world (clean, controllable, safe, perfect and peaceful). The inside/outside boundary is further elevated by the customs, layout and design of the living environment. Cleaning practices thus serve to re-negotiate the boundaries between these realms and safeguarding the home as market offerings cross over (Ger and Yenicioglu 2004). Tensions emerge in the negotiation of boundaries based on lack of trust for the marketplace. As objects cross the boundary from the “outside” world into the house, they need to be cleaned to avoid
contamination (Lastovicka and Fernandez 2005). Supporting Thompson (2005), consumers critically assess the risks of modern technologies (e.g., water pipes, detergent and appliances). Participants engaged in reflexive doubt, deploying four tension-minimizing strategies to renegotiate safe home boundaries: i) producing their own ‘creation’, e.g., making their own enzymes to mop their floor, ii) ‘making magic’ by bringing in other ingredients, e.g., soaking their vegetables in vinegar and black charcoal, iii) investing their ‘sweat’, e.g., rinsing with water repeatedly for several times, and iv) dismissing discomfort as ‘illusion’, e.g., pretending not to see the dirt on the vegetables.

**Contribution and implications**

The contribution of this research is twofold. First, the practice theoretical approach addresses the lack of holistic investigation in systems social marketing by highlighting complex interrelationships between personal, cultural, social and market entities in household cleaning practices. Second, the nature and logic of over-consumption as a voluntary choice or a rational decision is challenged. Water-consuming cleaning practices are driven by interactions between the home and the wider environment, reinforced by a pervasive hygiene discourse.

The theoretical insights suggest two interventions to address water over-consumption through excessive anxiety. First, systems interventions to reduce the perceived differences between a ‘dirty/outside’ and ‘clean/inside’. For example, a high visibility cleanup (e.g., zero street litter, a no littering mindset), merging the built environment with nature (e.g., more street trees, water features), and reconsidering the necessity of multi-layer household security systems as a norm. As the inside/outside boundary becomes more permeable, meanings of ‘dirty, danger and safe’ might shift, with implications for the intensity of cleaning practices and hence water consumption. Second, interventions directed at reducing the lack of trust for the marketplace. For example, consumer protection legislation that is visibly enforced will support more transparent business processes and a socially responsible image, increasing trust and reducing business-consumer tensions. Supporting the holistic nature of practice, these interventions require cooperation from government, city planners, developers, businesses and consumers, working in the same direction at the same time.

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The aim of this exploratory study is to better understand consumer attitudes about meat consumption and assess the intersections between meat avoidance and attachment. It also investigates how prominent plant-based, or self-imposed, dietary restrictions related to meat consumption are in the marketplace. While meat consumption is increasing in the developing world, it has plateaued in many developed economies. Optimal for health and projected trends suggest global meat consumption is set to rise further into this century, but not everywhere, especially in the Western world. Plant-based dieting appears to be taking a larger place in how consumers view food systems in developed economies. Results show that over 6.4 million Canadians have adopted a diet that either limits or eliminates the consumption of meat. Some generational differences were reported. A total of 63% of vegans are under the age of 38 and 42% of boomers consider themselves as flexitarians. Health benefits appear to be important for both genders. Women appear to be more concerned about animal welfare and taste preferences. Other factors generated mixed results. This study aimed at understanding, from a macromarketing perspective, the interconnectivity between both dimensions of meat consumption.
A Systematic Review of Sugar Sweetened Beverage Taxation – A Future Research Agenda for Macromarketers

Marius Claudy, University College Dublin, Ireland
Gerardine Doyle. University College Dublin, Ireland
Lisa Marriott, Victoria University of Wellington, New Zealand

The overconsumption of sugar is increasingly associated with rising levels of non-communicable diseases such as obesity, type 2 diabetes and cancer (e.g. Lim et al. 2017; Moodie et al. 2013; Naghavi et al. 2017). While voluntary industry codes have largely failed to curb the global overconsumption of sugar, governments are more willing to impose taxes on sugary products. However, the effectiveness of such taxes is still not fully understood (e.g. Brownell et al., 2009; Falbe et al., 2016). Indeed, most studies to date have modelled elasticities of demand and the resulting reductions in consumption, while often ignoring the complexities of multiple-stakeholder tax ecosystems (e.g. Shemilt et al., 2013). To address this paucity of knowledge, this study conducts a systematic review of the literature around the taxation of sugar-sweetened beverages, summarizing the evidence regarding the effectiveness of such policies in curbing consumption and reducing adverse health outcomes.

Specifically, the review finds that little is known about how the firms’ marketing efforts mediate and/or moderate the impact of sugar taxation on consumption. For example, the review highlights that few studies take into consideration manufactures’ responses to sugar taxation. Drinks manufacturer can decide to absorb price changes, change formulations or market their products more aggressively, which may counteract the effect of sugar taxes. Indeed, research shows that the tax will not be effective if the tax is absorbed by the retailers or manufacturers, and that taxes below 15–20% are unlikely to result in meaningful levels of reduced sugar consumption (Briggs et al., 2013; Falbe et al., 2016). Further, the systematic review shows that existing tax models often fail to adequately address the complexities of consumer behavior in response to a tax on sugary drinks. For example, the introduction of a sugar tax is likely to create signaling effects, and that the way the tax is communicated determines the level of support among key target populations (Reynolds, Pilling and Marteau 2018). Signaling effects may for example change the social desirability of sugary drinks which may lead to reduced consumption and increased substitution. While this effect has been widely observed in research and interventions in tobacco and alcohol consumption, as well as in the use of seat belts (Litt et al., 2014), it has yet to find its way into the domain of sugary drinks consumption.

Our study identifies and systematically structures these current knowledge gaps in our understanding of how the decisions and strategic reactions of key stakeholders, most notably beverage manufacturers, can affect the outcomes of such fiscal measures. The findings are summarized in a comprehensive framework that aims to serve as a starting point for social-marketers, policy-makers and researchers to map, analyze and critically assess the effectiveness of sugar taxes within complex and uncertain environments.

References


Back to Basics: Revisiting Observational Research to Study Macromarketing Phenomena - Begging as Exemplar

Francisco J. Conejo, Marketing Department, University of Colorado - Denver, US
Ben Wooliscroft, Marketing Department, University of Otago, New Zealand

Abstract

As marketing continues to become increasingly quantitative, alternative, time-honored approaches have become neglected. This paper revisits observational research and shows how it might be sill applied to study macromarketing phenomena. Denver begging illustrates the technique’s application. A sample of 360 beggars was observed following a semi-structured protocol. A variety of qualitative and quantitative insights provide an overview of who downtown Denver beggars are, where they mostly operate, how they beg, and what value they create. Despite being oft discounted, observation remains a viable research technique for macromarketing. It can be profitably used to become preliminarily acquainted with phenomena and uncover further directions; as the primary data collection method, to prove different hypotheses; and as a complement to other research techniques, to validate results previously obtained.

Keywords: Begging, beggar, value, exchange, marketing, observation.

Introduction

As academic disciplines mature, their research gravitates towards the quantitative (Dean, Shook and Payne 2007). This progression occurred in marketing. Via mostly surveys and statistical analyses, the field continually measures constructs, features, and interrelationships (Conejo, Wooliscroft and Insch 2017). Increasingly-sophisticated quantitative techniques yield a wealth of information. Marketing ever better understands its domain.

Such is marketing’s infatuation with measurement, that quantitative researchers have come to dominate editorial review boards and doctoral committees. There is sometimes even open antagonism towards qualitative approaches (Cheek 2005, Morse 2002). Marketing’s scientification has also come at the expense of alternative, time-honored approaches. One particularly neglected is observational research. Compared to other data collection methods the technique is perceived as limited: unable to accurately quantify phenomena, its data does not lend itself to sophisticated statistical analyses; limited to small samples, its findings are unsuitable for generalization; lacking other qualitative techniques’ depth, it does not provide a thick understanding of phenomena (Boote and Mathews 1999).

In line with this conference’s methods track, this paper revisits observational research and shows how it remains a viable option to study macromarketing phenomena. Despite the above objections, the technique is indeed capable of yielding useful quantitative/qualitative insights, actually bridging both perspectives. Observation provides a holistic understanding of phenomena, setting the stage for more-extensive and in-depth inquiries.

Denver begging illustrates the technique’s application. Marketing theorists like Hunt (1983) long call for research to transcend mainstream contexts and also address unconventional exchanges. Research on begging satisfies this call. Begging intersects marketing and society, within macromarketing’s realm (Fisk 1982). With few exceptions, e.g., Belk (1992) or Hill, Hirschman and Bauman (1997), marketing research focuses on prosperous contexts. It neglects market hardship, which is also important to understand. This begging study thus contributes to growing research on market hardship, comprising vagabonds, e.g., Sreekumar and Varman (2018); charitable giving e.g., Mittelman and Dow (2018); and subsistence entrepreneurs, e.g., Viswanathan et al. (2014), among others.
Denver was chosen for its topical relevance: It is an important transit hub for homeless travelers, hence beggars, moving cross-country (Webb 2019). It has also experienced a surge in homelessness and panhandling, issues that cities across the country equally struggle with (Haythorn 2018). Denver is furthermore representative of other American cities. Mid-sized (USCensus 2019) and located in the central US, it is less affected by the features of larger, denser, coastal cities. By focusing research on a specific place, the environments, participants, and events associated with it can be more-thoroughly assessed (Layton 2015b). Peterson (2016) indicates that the places associated with markets are under-researched. He thus encourages more place-based macromarketing research.

Begging has been receiving growing attention from academics, policymakers, and the general public (Adriaenssens and Hendrickx 2011). The authors hope that the insights herein provided help further understand the issue, and thereby contribute towards its resolution. Beyond the insights offered, this methodological paper also strives to highlight the potential of observational research. Despite being oft discounted, the authors believe that it remains a viable option to study macromarketing phenomena.

**Begging**

Begging occurs when gifts are solicited from unknown passersby in public (Adriaenssens and Hendrickx 2011). Requests mostly refer to money, widely preferred as it allows to purchase goods and services conveniently. Appeals might also refer to work, food, clothing, or shelter (Gmelch and Gmelch 1978). The income derived from begging, both monetary and in-kind, then allows individuals to sustain themselves, their households/dependents, and any organization they might belong to (Abebe 2009).

Begging takes different forms. It can be a short-term survival strategy to cope with interim adversity like job loss. Though once better income opportunities emerge, most individuals pursue them (Abebe 2009). Begging can also be long-term, even permanent. It thus becomes an occupation, through which professional mendicants make their living (Bentwick 1894). Begging may furthermore be done full-time, as a sole income source; part-time, to supplement other earnings; or intermittently, for sporadic income boosts (Adriaenssens and Hendrickx 2011).

Begging is sometimes a choice. Despite the shame, harassment and risk involved, some people still opt to become beggars. This path is followed to resist proletarianization (Gmelch 1986), achieve independence (Abebe 2009), or lead adventurous lives (Cooke 1908). However, begging stems mostly from a dearth of better livelihood opportunities (Abebe 2009, Adriaenssens and Hendrickx 2011). This lack derives from various interrelated macro, meso, and micro factors. Together they drive individuals towards the activity.

At the macro level, begging might result from major socio-environmental disruptions. Livelihoods may be thwarted by political upheaval, war, natural disaster, disease, famine, or recession (Cooke 1908). At the meso level, livelihoods might be upset by market slumps, technological change, or employers closing/downsizing. At the micro level, begging might result from lack or loss of required skills, rendering individuals unfit for employment (Gmelch and Gmelch 1978). This unsuitability may be compounded by personal factors such as physical/mental disability, failing health, race, gender, or substance abuse (Ozanne, Moscato and Kunkel 2013). All the above, combined with inadequate support, limited opportunities, and excessive competition, might leave individuals no other recourse than to beg.

**Research Questions**

The factors behind begging are well-understood. Conejo and Wooliscroft (2018) also address them from a historical systems perspective. However, begging has not yet been analyzed from
a macromarketing perspective. With begging not being a formal activity, it remains unclear whether it involves value creation and exchange. It is also unclear whether begging, as an aggregate activity, also constitutes a market. To shed light on these and other issues, this research sets out to answer the following questions:

1) Who are downtown Denver’s beggars?
2) Where do they mostly operate?
3) How do they operate?
4) What value do they create?

The above questions are empirically addressed via observational research. Answering them will provide a better understanding of begging from a macromarketing perspective. It will also provide insights useful in the formulation of public policy.

Observational Research

Observation is the basis for science (Adler and Adler 1994). As a means of formal inquiry, its discussion dates back to Classical times (Atkinson and Hammersley 1994). Aristotle, e.g., posited that via the senses one observed reality, until arriving at what was essentially true (Krips 1980). For the next two millennia, natural and physical science was based on observation. By the 18th century, the nascent social sciences adopted the technique. Armchair speculations no longer sufficient, sociologists and anthropologists started observing foreign cultures in-situ. Findings significantly enhanced theoretical development (Angrosino 2007).

In the early 20th century, observation started to be used to examine local subcultures (Boote and Mathews 1999). By mid-century, and in line with its growing psycho-social focus (Conejo and Wooliscroft 2015a), marketing increased its use of observational research to understand consumers (Abrams 2000). Since then, observation has been effectively applied to various marketing phenomena, addressing both quantitative and qualitative aspects. Observational techniques have also evolved. Different types are now possible (human/machine-based, structured/unstructured, overt/covert, natural/contrived, and participative/non-participative), their combination contingent on situational demands (Boote and Mathews 1999). Today, observation remains a useful technique within marketing’s research repertoire (Boddy 2016).

Reason for Choosing Observation

Observation is often used to study marginalized populations (Ozanne, Moscato and Kunkel 2013), beggars included (Adriaenssens and Hendrickx 2011). Its application follows methodological reasons. The technique is particularly suited when subjects are easily observable, operating on a broad social scale (Boote and Mathews 1999). Begging satisfies both criteria; it is done in public and constitutes a widespread activity. Observation is also suitable when data is difficult to obtain via other techniques (Boote and Mathews 1999). This is again the case. Studies on begging, e.g., Butovskaya et al. (2000), Melrose and Hartley (1999), consistently report how beggars distrust others. Fearing sanction or disadvantage, beggars are unwilling/reluctant to provide information. Even if beggars do cooperate, data might be compromised by a lack of verbal skills, altered states, or memory effects. Moreover, when beggars are engaged, their behavior changes, becoming more socially-desirable. Data thus becomes skewed. Finally, observation is appropriate when research not only strives to understand behaviors, but how physical-social contexts moderate them (Arnould and Wallendorf 1994, Ozanne, Moscato and Kunkel 2013).

In sum, observation overcomes the limitations of other methods like interviews or surveys. It allows to research phenomena with a low degree of response bias. Unobtrusive, observation
captures both overt and subtle aspects, not discernable through other techniques. As well-known in consumer research, what respondents claim is often different from what they do. Observation can provide an accurate record of behaviors in situations where subjects can or will not explain their reasons (Boote and Mathews 1999).

Methodology

Research Epistemology

Observation, like qualitative inquiry generally, often subscribes to post-modern paradigms. The latter essentially believe that truth, single and objective knowledge about a phenomenon, is both inexistent and impossible to attain. Multiple, subjective, and equally-valid realities instead exist, the product of social, cultural, and situational interpretations. Observational research is thus often immersive and collaborative (Angrosino and Rosenberg 2011, Lincoln, Lynham and Guba 2011).

Relativist perspectives are valuable. However, the authors find it difficult to subscribe to them, as doing so undermines the pursuit of truth, the fundamental goal of marketing research (Hunt 1991, 1990). A more-moderate epistemology is here adopted, that of scientific realism. The latter assumes that a single reality exists independently of how it might be individually perceived. The goal of science is therefore to develop objective knowledge about this reality. However, realism does acknowledge that social phenomena are inherently fuzzy. It also recognizes that single inquiries are imperfect. Given the influence of multiple, extraneous factors, findings must be verified to determine how well they truly reflect reality. Together, single findings eventually converge on what is, in fact, true (Healy and Perry 2000, Hunt 1991). Not only is realism suited for qualitative inquiry (Boddy 2016, Healy and Perry 2000), but highly appropriate for marketing research generally (Hunt 1991). It is also a healthy approach towards informing oneself in this era of increasingly-prevalent, and dangerous, alternative facts, see NPR (2017).

Sample

Observational sampling should be purposeful (Sandelowski 1995). The sample used thus comprised active beggars only. Though the sample included different beggar types, from homeless individuals, through entertainers, to charity solicitors. This diversity increased variability with respect to the phenomenon studied, improving data (Gorsuch 1997). The diverse sample also helped better understand begging as a whole. Samples were not structured to meet age, race, or gender quotas. While efforts to include underrepresented minorities are laudable, it would have here over-represented specific beggar types and skewed findings.

Qualitative research, like its quantitative counterpart, is subject to minimum sample sizes. Mason (2010) meta-analyzed 560 qualitative studies and found samples to average about 30 interviews. Marshall et al. (2013) meta-analyzed a further 83 studies and found samples also to converge on about 30. These findings are consistent with the literature, which indicates that this number typically suffices for reliable results, e.g., Abrams (2000), Creswell and Poth (2017).

However, qualitative sample sizes require an upward adjustment based on several factors. First, on the quantity of participant contact. If the number of contacts with each participant is low, and the length of each contact is short, then the size needs to be increased (Onwuegbuzie and Leech 2007, Thomson 2010). Second, on the quality of contact with participants. If the contact with each participant is not in-depth, then sample size needs to be expanded. Third, on the data’s variability. If observations are heterogeneous, then the size needs to be increased (Sandelowski 1995). Fourth, on the scientific paradigm followed. Positivist studies, like the
present, require larger samples to attain representative pictures of the populations studied and generalize findings (Boddy 2016).

Based on these considerations the present sample size was increased as follows: A sample of 30 interviews served as a start. Though all equal, 15-minute observations only yield a quarter of the information than say hour-long interviews. Sample size was thus quadrupled to 120. Moreover, and given the researcher-participant interaction, all equal interviews yield more data per time unit. Sample size was thus tripled to 360. This sample size is consistent with ethological studies which use up to 200 observation units (Sandelowski 1995). Also with quantitative studies needing at least ten observations per variable for reliable results (Osborne and Costello 2004).

**Data Collection**

Beggars are typically transient (Adriaenssens and Hendrickx 2011). The 360 observations were thus gathered in three-hour sessions systematically rotated across the seven days of the week. The three-hour sessions comprised 180 minutes each. Dividing the latter by 20 minutes (15-minute actual observation, per (Boote and Mathews 1999), plus five extra minutes for walking, prepping, etc.) allowed about nine observations daily. Sessions were also rotated across different times of the day: morning (8:00-11:00am), noon (11:00am-2:00pm), afternoon (2:00-5:00pm), and evening (5:00-8:00). Collection began March 11, 2018. Consistent with Nissen (2005), collection spanned several months, ending December 23, 2018. (360 observations, divided by nine/day equals about 40 weeks.) Collecting data during all seasons, on different days of the week, and at different times, reduced temporal biases, producing more representative results. Collecting data during scorching heat, through rain, to snow further provided representative results.

Panhandling studies typically collect data at locations with high beggar densities, like around city centers, landmarks, or transited streets (Adriaenssens and Hendrickx 2011, McIntosh and Erskine 2000). This study observed beggars along Denver’s 16th Street Mall. The roughly two km/16-block stretch is one of the city’s busiest (Roberts 2016a), notorious for its panhandlers (Jackson 2017). Observations started at either end of 16th Street and worked inwards. Starting points were alternated to reduce location biases and attain more representative results. Upon spotting a beggar, the lead researcher positioned himself a short albeit discreet distance away. Doing so allowed to see behaviors well, while at the same time not disrupt natural beggar behaviors. 16th Street’s crowded nature kept observations mostly undetected. To reduce repetition biases, beggars already studied were skipped, the researcher moving on to the next beggar.

Observation involves watching phenomena directly and systematically noting relevant aspects (Churchill and Iacobucci 2005). While in agreement with this notion, the present study is more encompassing. Following the Aristotelian tradition, it complements visual observation with information gained through other senses such as sound and smell. These additional sources enhanced the data, providing a more comprehensive understanding of the phenomena.

Observational research might be unstructured to familiarize researchers with phenomena and identify variables for further investigation (Boote and Mathews 1999). However, the authors had already conducted research on begging, e.g., Conejo and Wooliscroft (2018), Wooliscroft et al. (2017). Familiar with possible variables and relationships, this study followed a more-structured approach. Variables were a-priori defined to guide/delimit the data collection. Doing so also allowed to assess hypothetical variable relations better. A standard collection procedure improved efficiency, data consistency, and case comparability. It also allowed, in line with the
research’s positivist epistemology, subsequent verification/extension studies (Boote and Mathews 1999).

Upon finding a suitable vantage point, the researcher logged the date, time and beggars’ approximate location. Spoken notes were then recorded on the researcher’s cell phone. Doing so not only made the collection/analysis more efficient. It also allowed to use a small note pad, not a cumbersome clip-board; and was less conspicuous, as if the researcher were just talking by phone. Among others, notes were made on beggar’s perceived gender, age, ethnicity, physical/mental state, appearance, behavior, verbal engagement, disposition, use of a cup/sign, nature/location of belongings, area cleanliness, the presence/description of human or animal companions, and the overall begging approach used. As an indicator of begging effectiveness the number of donations received was also recorded. After the observation time ended the researcher casually passed the beggar to experience his/her pitch personally, get an up-close impression, and reward him/her.

Observational research lends itself to qualitative and quantitative inquiry (Boote and Mathews 1999). This study mixed both approaches. The protocol combined categorical, numerical, and open-ended items. Categorical items placed subjects within discreet types (e.g., Gender: M, F, D/K). Numerical items comprised rating scales (e.g., Appearance: 1-Filthy to 6-Immaculate). Categorical and numerical data allowed to apply counts and simple statistics, resulting in a quasi-measurement (Boddy 2016). Open-ended items allowed free commentary on beggars’ various aspects. Together, item types provided a more holistic perspective of begging.

This research is thus in the tradition of classic observational studies. It is non-participatory, researchers completely removed from subject interaction; covert, researchers diminishing the fact that observation took place; and naturalistic, subjects studied in their quotidian environments. These measures preserved subjects’ natural behavior, reducing interaction biases and reactivity, providing a more realistic picture of the phenomenon studied (Angrosino and Rosenberg 2011).

Ethical Considerations

Observation, like any other research technique, has ethical considerations. However, since the behaviors studied were not reprehensible nor criminal; executed by subjects’ own free will and in public; and the researcher’s notes in no way jeopardized subjects’ identity nor safety, ethical considerations were deemed minimal (Angrosino and Rosenberg 2011). The project was nevertheless submitted to the University of Colorado Denver’s Institutional Review Board (Protocol 18-0474). Exempt approval was granted March 9, 2018.

Beggars a vulnerable population, a researcher concern was not exploiting them for professional/personal gain. Per Adriaenssens and Hendrickx (2011), among others, beggars were rewarded immediately after observation. Compensation was split as follows: Beggars directly received $3 for participating. Said amount is more than beggars usually ask for (a quarter, spare change, a dollar), also above what passersby ordinarily give. Extrapolated it represents a tax-free $12 hourly wage. This amount exceeds the $11.10 Colorado and $7.25 federal minimums (ColoradoStateGovernment 2019), thus adequate. For each of the 360 beggars, an additional $3 were given to the Denver Rescue Mission (another $1,080, $2,160 total). This local charity provides emergency shelter, food, and medical services to hundreds of homeless daily. It also offers rehabilitation and integration programs (DRM 2019, Webb 2019). The Denver Rescue Mission donation helped support existing assistance efforts, and thereby benefit beggars/homeless more generally, beyond only those observed.
**Data Analysis**

Qualitative data, derived from open-ended items, was analyzed by organizing it into prevalent themes, see Ozanne, Moscato and Kunkel (2013). This was done by repeatedly examining notes, until distinct, thematically-stable categories emerged, see Glaser and Strauss (1967), Miles, Huberman and Saldaña (2014). Doing so uncovered preliminary relationships among variables. Categorical data, derived from multiple-choice items, and quantitative data, derived from rating-scale items, were analyzed via counts and basic statistics. These quantified the relationships identified, allowing to understand Denver begging better.

**Results**

A criterion of observational sufficiency is data saturation. This notion entails adding observations until reaching diminishing returns: additional observations contribute progressively less new information, becoming more redundant (Glaser and Strauss 1967). Achieving saturation makes findings somewhat representative and generalizable (Boddy 2016, Guest, Bunce and Johnson 2006). The latter is the goal of empirical science and forms the basis for theoretical development (Uncles and Kwok 2013). Saturation was achieved. By around the 120th observation, data became increasingly redundant. Despite the diminishing returns, data collection continued until reaching the intended 360 observations. Saturation lent credibility to findings (Sandelowski 1995). These are considered additionally robust given the observation number. Following the results obtained.

1) **Who are downtown Denver’s beggars?**

The nature of potential recipients matters in charity situations (Eckel and Grossman 1996). This research thus first determined the nature of Denver beggars. These were assumed to be a diverse population. However, results indicate otherwise, Denver beggars rather homogeneous.

Denver’s population is split between genders, 50% each (USCensus 2010). However, the city’s beggars were 81% male, over-indexing at 1.62. An aspect covered by this study was how many donations beggars received during the 15-minute observation period, on average three. Donation number depends on various factors like location, appearance, or approach, among others. Though isolating gender, and keeping other factors constant, females over-indexed at 1.18 in donations received. Females’ success might derive from male beggars historically being perceived as irresponsible and lazy, thus less worthy of assistance (Garraty 1978). Their success might also stem from female beggars being perceived as more vulnerable than male ones, thus evoking more sympathy, and donations, from passersby (Gmelch and Gmelch 1978).

Beggars were assumed to match Denver age-groups. While median ages were close (35/34 yrs. respectively), distributions resulted dissimilar. Table 1 shows how beggars in the 20-29 and 30-39 brackets account for 64% of observation, over-indexing at 1.22 and 2.32 respectively. The statistical mode was 30 years, appearing in 27% of observations. Begging is thus mostly a young-adult phenomenon, concentrated in the 25-35 range. Thereafter beggars seem to integrate into the workforce, settle down, and pursue conventional lives. This interpretation is consistent with Webb (2019), who indicates that many Denver beggars are young homeless travelers, and with Skaggs (2014), who shows how some aging travelers start seeking stability.
Table 1: Denver Age Distributions County vs. Beggars

<table>
<thead>
<tr>
<th>Age</th>
<th>&lt;20</th>
<th>20-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60-69</th>
<th>70-79</th>
<th>&gt;80</th>
<th>Total</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>County</td>
<td>24%</td>
<td>18.8%</td>
<td>17.7%</td>
<td>12.9%</td>
<td>11.6%</td>
<td>7.8%</td>
<td>4.0%</td>
<td>3.2%</td>
<td>100%</td>
<td>34yrs</td>
</tr>
<tr>
<td>Beggars</td>
<td>0%</td>
<td>23%</td>
<td>41%</td>
<td>8%</td>
<td>11%</td>
<td>17%</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td>35yrs</td>
</tr>
<tr>
<td>Index</td>
<td>N/A</td>
<td>1.22</td>
<td>2.32</td>
<td>0.62</td>
<td>0.95</td>
<td>2.18</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Noteworthy is how beggars aged 60-69 over-index at 2.18 with their age group. It seems that disproportionately many people nearing/already retired lack subsistence means. Unable to work, possibly due to age, health, or skills, these individuals are forced to beg as an ancillary/main source of income. However, beggars in their 60’s over-indexed in donations, 1.23. This success might derive from passersby considering old age and its limitations as legitimate reasons to beg (McIntosh and Erskine 2000). Seniors, simply by their age/appearance, might also be more endearing to passersby.

Beggars were assumed to match Denver’s ethnic makeup. Though distributions were also dissimilar. Table 2 shows how white beggars predominate, 71%. This high figure might derive from the young travelers, mostly white, who frequently pass through the city (Webb 2019). Both white and black beggars over-indexed, 1.23 and 1.44 respectively. However, and despite Denver’s large Hispanic population, beggars of this ethnicity significantly under-index, 0.35. This low figure might have to do with Hispanic’s collectivist nature (Hofstede 1984), which on the one hand pressures teens/young adults to follow norms (get a job, start a family, etc.), while at the same time providing them (and seniors) with social support structures reducing the need to beg.

Table 2: Denver Ethnic Distribution County vs. Beggars

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Caucasian</th>
<th>Hispanic</th>
<th>African</th>
<th>Asian/PI</th>
<th>Native Am</th>
<th>Other</th>
<th>Mix</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>County</td>
<td>52.20%</td>
<td>31.8%</td>
<td>9.7%</td>
<td>3.4%</td>
<td>0.6%</td>
<td>0.2%</td>
<td>2.1%</td>
<td>100%</td>
</tr>
<tr>
<td>Beggars</td>
<td>71%</td>
<td>11%</td>
<td>14%</td>
<td>3%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Index</td>
<td>1.23</td>
<td>0.35</td>
<td>1.44</td>
<td>0.88</td>
<td>1.66</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Beggars’ physical condition was generally acceptable. It ranged from being recently bludgeoned and unable to walk, through disabled but otherwise healthy, to strong and vibrant. 14% of beggars seemed injured/disabled, using canes, walkers, or wheelchairs. (Some fakes were spotted, like the supposedly blind man checking out girls.) However, injured/disabled beggars over-indexed in donations, 1.18. It seems that passersby deem injury/disability, and thus work inability, as legitimate reasons to beg. The exception was when passersby perceived injuries/disabilities as being beggars’ own fault. This reduced donations, even eliciting mockery and scorn. An example would be a morbidly obese lady in a wheelchair, who while gorging on cookies and soft drinks, requested help for her diabetes. Similarly, if beggars looked...
too healthy, then donations also decreased. Passersby presumably considered them perfectly able to work, just not willing to do so, and therefore unworthy of help.

Beggars’ mental condition was generally acceptable. It ranged from catatonic/manic states, through moderate slowness/quirks, to complete lucidity. 23% of beggars showed mental anomalies (Their cause, drugs or mental illness, undetermined.) Unlike physical disability, beggars presenting mental issues under-indexed in donations, 0.81. Passersby seemingly deem mental abnormality a threat. They thus minimize contact or outright avoid such beggars.

Beggars’ physical appearance was generally acceptable. It ranged from being filthy and in rags, though worn and dirty, to immaculate, like anyone else on the street. The relation between appearance and donations was interesting. Beggars obtained good results when they appeared somewhat unkempt. Also when they had a cool look. Dreadful appearances received disgust and avoidance. Passersby likely considered these beggars beyond help, not donating. If beggars looked too good, then passersby would also not help presumably thinking that it was not needed.

Beggars generally operated alone, 72%. When companions were present, it was mostly one (21%) or a couple (5%). Rarely were larger groups sighted (2%). It seems that as beggar increase in number, the more intimidated passersby become, decreasing donations. Companions largely matched beggars’ gender. Rarely were couples sighted. This pattern possibly derives from relationships adding complexity to an already tricky situation, beggar pairs/groups best operating as single-gender teams. In few instances, 3%, did beggars have children with them. This had mixed results: If beggars were male, they were ignored and sometimes scorned for not properly supporting their children. If beggars were female, sympathy increased, and with it, donations.

8% of beggars had pets. Except for the single cat on a leash, animals were all medium-sized dogs. Observations revealed how dogs provide beggars with company, friendship, and entertainment. Also protection, alerting and defending their owners from strangers. Dogs significantly increased donations. Beggars with them over-indexed at 1.27. This possibly derives from dogs being perceived as cute/cool, drawing attention, and stimulating conversation, giving beggars better odds. Increased donations might also derive from dogs being perceived as dependents, thus eliciting more sympathy from passersby, especially females. Ironically, passersby seemed to care more about dogs than children.

Beggars not only sought to support themselves and their companions. 14% worked for causes, like Save the Children, Nature Conservancy, or LGBTQ rights, among others. Noteworthy is how cause beggars over-indexed in donations, 1.37. Asides from superior effort/technique, discussed later, these results possibly derive from passersby considering causes more legitimate/worthy. Also from cause donations having a broader impact, not only benefitting single individuals. This interpretation would be consistent with Eckel and Grossman (1996), who observed significant donation increases when recipients were established charities opposed to anonymous individuals. Superior results also derive from how organized some of these causes were. Not only did they target high-transit locations at peak times. They also operated in squads: Parallel teams, each comprising two-three members, would work both street sides simultaneously. Some squads even had supervisors, who provided immediate feedback to improve results.

2) Where do downtown Denver beggars operate?

Denver’s 16th St. is notorious for panhandlers (Jackson 2017). However, these were not equally distributed along its length. Beggars operated mostly towards the Mall’s center, rather than at its ends. This finding was surprising, considering that both ends feature transit hubs,
one even Denver’s central train station. Figure 1 shows beggar densities. The Mall’s 16-blocks are split into four quarters. The first, from Wyncoop to Market (yellow), contained 12% of beggars. This low density was surprising. Comprising new luxury developments, numerous bars and restaurants, and Whole Foods, Lower Downtown (LODO) is one of Denver’s most affluent areas. One would think that its high incomes and liberal values would stimulate begging. However, the low beggar density indicates otherwise.

![Figure 1: Denver Beggar Location/Density](image)

The second and third quarters, from Larimer to Welton (red), contained 66% of beggars (32% and 34% respectively). 56% concentrated in the five blocks between Arapaho and California (maroon). This area is one of the city’s busiest (Roberts 2016a). Not only does it contain two light-rail stations, thousands of people entering/exiting downtown through these. It also contains several department stores (Target, TJ Max, Ross), pharmacies (Walgreen’s, CVS), and a 7-11, among many other retailers/eateries driving foot traffic. Furthermore, the five blocks roughly parallel the convention and performing arts centers, both two blocks away on 14th. This makes the area highly transited by out-of-towners as well. It seems that instead of seeking high-value targets, i.e., LODO’s affluent crowd, beggars instead pursue volume. Begging might be a strict numbers game, high traffic locations improving the odds.

The fourth quarter, from Glenarm to Broadway (orange), contained 22% of beggars. This area, comprising mostly offices and less foot traffic, would ordinarily contain fewer beggars. However, two sites disproportionately increased its beggar density. First is the Tremont corner, having a 7-11, the Uniqlo department store, and marking the beginning of the Denver Pavilions Mall. Second is the Cleveland corner, with a McDonald’s notorious as an indigent hangout, best known for the 2016 pipe attack (https://abc7.com/news/video-homeless-man-attacks-bystanders-with-large-pipe-in-denver/1409458/). It thus seems that begging is driven by foot traffic associated with retail, food, and entertainment, not work.

Beggars also showed patterns at the micro-location level. In regards to city blocks, one might expect beggars to operate mostly on corners. All equal, this increases passersby, and thereby, donations. However, only 35% of beggars worked corners, against buildings, traffic light posts, or mail/utility boxes. Most beggars, 52%, instead placed themselves towards block’s interior. Typical locations were, on the one hand, close to bus stops. Beggars took advantage of people getting on and off the free 16th St. shuttle, complementing foot traffic. On the other hand, beggars located themselves by retailers with strong clienteles like Target, Walgreens, or 7-11. The remaining 13% of beggars were mobile, walking the 16th St. intercepting pedestrians. Noteworthy are their infrequent donations, under-indexing at 0.67. The poor results might derive from beggars, strangers and variously undesirable, invading people’s personal space. Taken as a threat, at best unpleasant, passersby avoided interaction, reducing donations.
As to sidewalk-location, one might expect beggars to position themselves towards the middle. Doing so slows-down passersby, giving beggars more opportunity to ask. However, only 14% of beggars operated mid-sidewalk. It seems that blocking pedestrians, just like intercepting them, is taken as aggressive. Representing an interruption, possibly a challenge, it indisposes passersby reducing donations. Most beggars, 57%, instead located themselves on sidewalk interiors, against walls, windows, or doorways. This might seem counterintuitive. However, beggars are already perceived as nuisances. Positioning themselves out of pedestrians’ way reduces the disruption they cause, thus improving their donation odds. There is perhaps also a comfort/security aspect. Interior locations give beggars something to lean against while shielding them from the elements. Interiors also protect beggars against robberies/attacks, not needing to watch their backs. 25% of beggars located themselves on the outer sidewalk, by the curb. This seems a compromise between inner and mid-sidewalk locations, out of the way yet more visible (and riskier). Only 4% worked the 16th Street’s median, between both bus lanes. This minimized disruption, but also passersby and donations.

Noteworthy is how panhandling locations are not generally static. Some beggars had fixed places, always at the same spot. Most, however, were seen at different locations on different days, some moving throughout the same day. Location changes might derive from police harassment, competition, or poor results. Changes might also be weather-related. During spring/fall, when sometimes rainy, beggar sought roofed locations to remain dry. During summer, when hot, they sought shade, ideally close to beverage sources. During winter, when cold, they followed the sun to be less cold. Seasonality/weather thus determined what street side beggars operated on, and how far into the block they positioned themselves, corners more exposed. Overall, beggar locations typically mirrored pedestrian patterns, geared towards increasing exposure and earnings.

3) How do downtown Denver beggars operate?

Begging might seem self-evident, basically pleading for donations from passersby. However, beggars did not plea equally. As to frequency, 12% of beggars did not plea at all. They just sat/stood silently, expecting passersby to give. Their donations were unfavorable, under-indexing at 0.62. Remaining beggars’ plea frequency ranged from rare to constant, being mostly occasional. Plea and donation frequency seem related: After a certain point, additional pleas become annoying, decreasing results.

Beyond plea quantity is plea quality. Directly requesting money (“Spare some change?”) was found ineffective, under-indexing at 0.86 in donations. Such functional and oft-mechanical pleas rarely compelled gifts, making it crassly evident that beggars only wanted money. More successful pleas were those that reduced the social distance between beggars and passersby, ideally establishing an emotional bond. This was achieved, among others, by obeying social norms. E.g., some organizational beggars would systematically greet approaching pedestrians from afar (verbally/gesturally), break the ice with brief small-talk relevant to the passerby (“Great Broncos cap!”), and only then go into their pitch. Importantly, pitches provided value to passersby (E.g., “How would you like to help save the world today?”) Even if rejected, organizational beggars would enthusiastically thank passersby and wish them well. While requiring added effort, these more-elaborate pleas portrayed beggars as civil, friendly, and thus worthy of donations. Beggars who did so over-indexed at 1.24. Even when rejected, the polite approach left beggars in good standing with other passersby, increasing the odds of subsequent success. It is obvious how well-trained some organizational beggars were. Independent beggars would be well advised to learn their techniques. However, this also highlights the disadvantage that independent beggars have opposed to their corporate counterparts.
Related to plea quality is beggars’ disposition. Beggars that were positive and friendly, 43%, manifested by smiles or waves, over-indexed at 1.21 in donations. This follows non-verbal cues reinforcing verbal ones, together producing better results. Serious beggars, 29%, under-indexed at .95, while those appearing annoyed or down, 28%, under-indexed at 0.81. A few beggars were aggressive. They rapidly approached passersby and sometimes even yelled at them. Wanting to avoid confrontation with potentially-unstable/dangerous individuals, passersby actively avoided these beggars by say crossing the street. These aggressive beggars received no donations. Some passersby instead sent the police after them.

A quintessential beggar feature is their signs. Surprisingly, only 54% of beggars had them. Though signs significantly improved results. Beggars with them over-indexed at 1.23 in donations. Two reasons might explain this. From a semiotic perspective, see Conejo and Wooliscroft (2015a), signs implicitly signal the nature of those holding them (beggars), and thereby, what passersby should do (donate). Signs are also effective marcom tools. They explicitly inform and persuade passersby to give, even without beggars’ verbal engagement. Sign quality was consistently low. They mostly consisted of mid-sized pieces of brown cardboard, with brief messages like “Homeless, please help,” hand-written in black marker. Better signs were rare, though still seen. These were of white cardboard or wood; had nice, clear, multi-color lettering; and might even include graphics. Compared to low-quality signs, better ones over-indexed at 1.14 in donations. Their effectiveness might also derive from the perceived effort involved, positively portraying beggars.

Another quintessential beggar feature are the cups/hats into which passersby place donations. Oddly, only 39% of beggars used such receptacles. Also surprising was how significantly they improved results. Beggars with cups over-indexed at 1.41 in donations, these the most important success factor. Cups not only reinforce signs’ informational/persuasive functions. (To make it unmistakable, some cups prominently features $1 bills.) More importantly, cups facilitate donating. As receptacles, cups hold loose change that would otherwise spill. They are also usually placed in front of beggars, closer to passersby, reducing the effort/inconvenience of giving. Finally, and from a psychological perspective, cups provide distance. They prevent passersby from getting too close to beggars, handing donations directly to them, and coming in direct physical contact. Donors’ personal space is maintained, thus reducing physical/mental risk.

4) What value do downtown Denver beggars create?

Beggar donations are sometimes considered gifts. Seemingly one-way, no quid-pro-quo is thought involved. This lack of exchange bars donations from being proper transactions. It also excludes begging in aggregate from being a market, removing the activity from macromarketing’s realm. We would argue otherwise.

Gifts, including charitable ones, have been long-discussed by economists, e.g., Becker (1974) and others. Analyses initially assumed that people gave gifts selflessly. However, purely-altruistic models failed to explain actual gifting behaviors (Harbaugh 1998). While economists still recognize pure altruism as possible, they now see this giving as exceptional (Andreoni 1990). Gifting instead derives from mostly impure motives, their salience contingent on the person/situation. In exchange for their gifts, givers acquire a warm glow, personal satisfaction derived from having helped a cause (Andreoni 1989). Givers also attain social objectives such as approval, respect, or prestige (Olson 1965). Gifting might furthermore be instrumental, geared towards signaling income (Glazer and Konrad 1996), securing opportunities (Harbaugh 1998), or attaining various other goals (Bernheim and Bagwell 1988).
The above motivations deflate idealized gifting notions. However, recall how French billionaires scrambled to pledge hundreds of millions of dollars each towards the burnt Notre Dame. It remains unclear if these magnanimous sums were offered out of pure altruism, for corporate taxation purposes, or are just a case of one-upmanship amongst billionaires, see McAuley (2019). As the example illustrates, giving is unlikely purely-altruistic, but potentially laden with selfish motives. Gifts are not public goods, but more akin to private ones. Via donations, givers actually purchase various forms of private utility. Gifting is thus an exchange; the utility derived from it increasing with amounts and number of times given (Andreoni 1989, Harbaugh 1998). This the case, beggars do provide value. Begging indeed involves transaction/exchange, the activity in aggregate constituting a market, all within macromarketing’s realm.

The value that beggars provide is hard to observe. The psychological, social, and instrumental benefits are internal to givers, rarely expressed behaviorally. As to psychological value, one might presume that giving to beggars provides a warm glow, satisfaction derived from having helped someone in need. This satisfaction might derive from feelings of social justice or empathy, consistent with Butovskaya et al. (2004). Another satisfaction source might be religious piety. This would be consistent with the beggar signs observed, many of which stated “God bless.” Beggar donations might also alleviate guilt, compensating for givers’ relative wellbeing; or generate a feeling of positive karma, potentially improving givers’ future. Several beggar signs addressed the latter aspects. Around Christmas, one sign read “No home, no X-Mas.” Other signs said “It could be you” and “Pay it forward.”

The social value provided by beggars was less difficult to observe as donors like to make their gifts public (Harbaugh 1998). During the workweek, 16th Street pedestrians comprise mainly employees, mostly alone and in a hurry. Those giving to beggars were mostly female, presumably more empathetic than males. However, during weekends pedestrians’ nature varied. Their bulk shifted to shoppers and couples/groups out for a good time. Within this more-leisurely context, the social value provided by beggars became visible. A behavior repeatedly observed was how in couples males became the most frequent donors. It is unclear whether this derives from female encouragement, or if its males’ own choice. An explanation for the latter might be that by giving to beggars, males position themselves as more compassionate and caring, and therefore, as better suitors/partners. With groups, it was once again males who most frequently donated. This might derive from wanting to ascertain their group position, the small yet highly symbolic gesture of giving signaling to other members.

Noteworthy is how audiences impacted busker donations. If buskers were largely ignored, and accrued no audience, they received few donations from passersby. However, if a single person stopped to see the busker, then further people would accumulate, and more passersby would donate. It seems that giving to buskers is socially-conditioned, passersby needing others to validate who is worth watching/supporting. This finding is consistent with Nunes (2014). Moreover, among busker crowds, it was again males who mostly donated. They sometimes made a show of how they donated: Not only did they conspicuously march (not walk), but sometimes even displayed the $1/$5 bill given by holding it high. Such behavior might reflect males wanting to gain social approval or prestige via their giving.

As to instrumental value, one might presume passersby to want to gain control over beggars through their gifts. This might be the case if passersby are downtown residents/workers, walk 16th Street regularly, and are thus likely to encounter beggars repeatedly. For a small price donors buy beggars’ goodwill. This is perhaps done to reduce the chance of present/future damage, like being harassed or attacked by beggars; and/or increase the likelihood of beggars’ present/future assistance, if say harassed or attacked by others. Donations might also be
intended to initiate and sustain social contact. Such a dynamic was seen between an old beggar and some passersby, who greeted each other by name wishing each other well.

Beggars provided other forms of value ranging from the abstract to the concrete. As to the former, one might mention humor, mostly dark and self-debasing, which lightened passersby’s day. One beggar’s sign said “Ex-wife had better attorney,” while another’s “Who are we kidding - it’s for weed.” Then there was flattery. Complements given boosted passersby’s ego, also improving their day. A couple of LODO beggars, well-dressed and thus with a certain authority, complemented passersby saying things like “Looking sharp my man, dig those threads! Wanna help us with a buck?” In both cases generating positive feelings added value, stimulating exchange.

Beggars also created more tangible forms of value. On the one hand is the provision of services. These might be utilitarian, like shoe shining or windshield washing; or symbolic, like entertainment by the various street performers. On the other hand is the provision of more tangible products. These included buying The Voice newspaper, proceeds supporting Denver homeless, or buying a custom poem, written on an old-school typewriter.

**Discussion**

The present study used observational research to attain a broad picture of downtown Denver begging. This was accomplished. The insights provided, summarized in Table 3, not only add to the begging literature. They also contribute to the macromarketing’s hardship literature. Insights might also help local public policy, and thereby, towards how the city addresses the growing beggar issue.

*Table 3: The Nature of Downtown Denver Begging*

<table>
<thead>
<tr>
<th>Question</th>
<th>Aspect</th>
<th>Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who are downtown Denver’s beggars?</strong></td>
<td>Gender</td>
<td>Male 81%, female 19%</td>
</tr>
<tr>
<td></td>
<td>Age</td>
<td>20s-30s 64%, 60s 17%, 50s 11%, 40s 8%. Mostly 25-30 year olds.</td>
</tr>
<tr>
<td></td>
<td>Ethnicity</td>
<td>White 71%, Black 14%, Hispanic 11%, Asian 3%, Native Am. 1%</td>
</tr>
<tr>
<td></td>
<td>Physical Cond.</td>
<td>Generally-acceptable 86%, injured/disabled 14%.</td>
</tr>
<tr>
<td></td>
<td>Mental Cond.</td>
<td>Generally-acceptable 77%, anomalous 23%.</td>
</tr>
<tr>
<td></td>
<td>Physical App.</td>
<td>Generally-acceptable, form completely disheveled to pristine.</td>
</tr>
<tr>
<td></td>
<td>Companions</td>
<td>Alone 72%, one 21%, two, 5%, more 2%.</td>
</tr>
<tr>
<td></td>
<td>Pets</td>
<td>None 92%, with pets 8%, mostly dogs.</td>
</tr>
<tr>
<td></td>
<td>Affiliation</td>
<td>Independent 86%, organization/charity 14%</td>
</tr>
<tr>
<td>Where do they mostly operate?</td>
<td>16th St.</td>
<td>Central portion: Larimer to Welton 66%, Arapaho-California 56%</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Block</td>
<td>Interior 52%, corners 35%, mobile 13%.</td>
</tr>
<tr>
<td></td>
<td>Sidewalk</td>
<td>Inner 57%, outer 25%, middle 14%, median 4%.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Most mobile over time, even same-day.</td>
</tr>
<tr>
<td>How do they operate?</td>
<td>Plea</td>
<td>Yes, mostly occasional 88%, no 12%, complexity varies.</td>
</tr>
<tr>
<td></td>
<td>Disposition</td>
<td>Positive 43%, serious, 29%, negative 28%.</td>
</tr>
<tr>
<td></td>
<td>Sign</td>
<td>Yes 54%, no 46%, quality varies.</td>
</tr>
<tr>
<td></td>
<td>Cup</td>
<td>Yes 39%, no 61%.</td>
</tr>
<tr>
<td>What value do they create?</td>
<td>Psychological</td>
<td>Warm glow, alleviate guilt, positive karma.</td>
</tr>
<tr>
<td></td>
<td>Social</td>
<td>Better suitors/partners, ascertain group position, social approval/prestige.</td>
</tr>
<tr>
<td></td>
<td>Instrumental</td>
<td>Reduce damage and/or increase assistance in present/future, acquaintance</td>
</tr>
<tr>
<td></td>
<td>Positive feelings</td>
<td>Humor, flattery</td>
</tr>
<tr>
<td></td>
<td>Service/products</td>
<td>Utilitarian, symbolic, tangible</td>
</tr>
</tbody>
</table>

As to who Denver beggars are, and counter to expectations, findings show that they are a rather homogenous population: Mostly white males around 30 years of age; typically in acceptable physical and mental condition; with a generally-acceptable appearance; and operating alone and for themselves. Also interesting is how a secondary cluster of senior beggars emerged. The needs/issues associated with these two clusters are dramatically different. The city might thus use a two-pronged approach, addressing each cluster in specific ways.

As to where Denver beggars operate, these were found to operate mostly in the central portion of 16th St., especially between Arapaho and California streets. Counter to expectations most operate in blocks’ interior, not corners, and mostly on sidewalks’ interior, up against walls, windows, and doorways. With this in mind, the city might first focus its efforts on this short corridor, developing strategies appropriate to its infrastructure, traffic patterns, etc.
As to how Denver beggars operate, most were found to verbally plea and have positive dispositions. Oddly, only about half the beggars used signs and less than half cups. These findings highlight how beggars intuitively apply marketing principles to sway consumers towards donating.

Finally, as to what value Denver beggars provided, these were found to give donors psychological, social, and instrumental utility. Beggars also lightened people’s day via humor, flattery, and the provision of various goods and services. As can be seen, and contrary to what might be conventionally thought, beggars do create value, thereby encouraging exchange.

However, beggars arguably also add value to the city as a whole. Denver’s vagrants and panhandlers are oft associated with 16th Street’s high incidence of drugs, crime, and violence. They also contribute towards its unkempt appearance, to the detriment of locals and visitors alike, see Roberts (2016b). While this negative value is undeniable and needs to be addressed, Denver’s different beggars also have a positive effect on the downtown area. Not only do they entertain passersby, but their picturesque nature become conversation pieces. Some beggars have even become downtown fixtures, part of the cityscape. Together, both the good and bad, contribute to downtown Denver’s unique experience.

Vagrancy and panhandling have been a staple of Denver life since the city’s inception. Over the last 150 years, both punitive and benevolent measures have been grossly ineffective in eradicating the activity (Conejo and Wooliscroft 2018). Instead of continuing to fight this impossible battle, city stakeholders are instead advised to accept this reality and work within it. By developing new creative approaches, which actually capitalize on beggar’s value provision potential, Denver can be made an even more vibrant city, to the benefit of all.

**Limitations and Future Research**

This study provided a variety of insights. However, findings are not exempt from limitations. Most important is researcher subjectivity. Observation’s prime strength is its low response bias compared to other research methods. It captures what subjects actually do, opposed to what they claim to have done (Boote and Mathews 1999). However, present observations were all done by a single individual. Efforts were made to remove personal biases and approach subjects objectively and systematically. Though biases might have nevertheless remained, tainting how observations were interpreted. Moreover, as research progressed, the researcher might have become gradually desensitized to phenomena observed, further impacting interpretations. Future research might thus incorporate multiple researchers, which independently observe the same subjects. While certainly onerous, doing so would allow to cross-reference interpretations and arrive at more objective findings. It would also permit the calculation of inter-rater reliabilities, e.g., Kassarjian (1977), among others, providing an objectivity measure.

A second limitation pertains the research approach, which while observation-based, combined quantitative and qualitative aspects. A broad picture of Denver begging was provided, in line with this study’s objective. However, neither the quantitative nor qualitative aspects were developed to their fullest. The present study should thus be considered a stepping stone towards more comprehensive efforts. In regards to the quantitative aspects, the numerical findings offered remain rather basic, limited to simple descriptive statistics. Future research might use stronger multivariate techniques to determine correlations amongst variables and perhaps causality. Doing should provide a more comprehensive understanding of the issues on hand.

As to qualitative aspects, the hallmark of this type of research is a deep understanding of phenomena (Patton 2015). However, this study followed a more-positivist approach. It focused on attaining a broad, representative picture of Denver begging. While this was achieved, findings admittedly remain superficial. Future research might thus consider interviews, focus
groups, or case studies to study the aspects here uncovered in more depth. Furthermore, observational research is based on manifest features/behaviors. However, equally important are the underlying reasons behind these. Future research should thus address the whys behind the beggar features/behaviors here uncovered. This also involves delving deep into the different topics.

Finally, this research focused on Denver beggars. While the city is fairly representative of other US locations, the insights obtained do not necessarily apply to them. The literature long notes how different places have idiosyncratic ways of begging, e.g., Cooke (1908). One might thus presume that the profiles, locations, and value creation of beggars elsewhere also differ. Further research addressing different settings is thus suggested to see if patterns emerge. To systematically address this issue, future research might first cover other western/inland US cities to verify present results. Studies could then address increasingly-different locations, until arriving at completely different ones in other countries/cultures. Once the differences/similarities across a broad location spectrum are established, a more comprehensive picture of begging might be attained.

Closing Thoughts

The above limitations notwithstanding, observation remains a viable research technique for macromarketing. Observational research is most versatile: It can be profitably used before a study, to become acquainted with the phenomena of interest and uncover further directions; as the primary data collection method, to prove different hypotheses; and as a supplement to other research techniques, to validate results obtained (Boote and Mathews 1999).

As indicated at the beginning of this piece, marketing research is gravitating towards increasingly-sophisticated quantitative approaches. These are yielding a wealth of information, marketing ever closer to understanding its domain. While quantitative methods are certainly valuable and should be continued to be used, some phenomena are still best approached from a qualitative perspective (Most, Conejo and Cunningham 2018). Furthermore, not always does marketing research require a multivariate sledgehammer to crack a nut. Researchers at times become enamored with fancy quantitative models, used for no other purpose than the technique itself. Macromarketers are thus invited to go back to the basics of science, and revisit observational research to understand macromarketing phenomena.

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Is Big Data Short Sighted: Rediscovering the Voice of the Customer
Deborah DeLong, Chatham University
Tina Facca-Miess, John Carroll University
Mahima Hada, Baruch College, CUNY
Paula C. O’Callaghan, University of Maryland University College

Abstract

BareBurger is an upscale fast food restaurant chain specializing in locally sourced, gluten-free, organic and other sustainability-oriented menu items served in a trendy urban setting. Founded by two brothers and several college friends in 2009, the restaurant has expanded to 40 locations in the US, China, Japan and the UAE, with continued growth as a top priority.

According to BareBurger’s CMO, a critical key to success is building an actionable customer database that can support direct marketing tactics such as digital communications, geo-targeting, automation and other tools for disseminating customized content. This database includes customer data stripped from each in-store electronic transaction as well as appended data fields purchased from third party vendors. The CMO is enthusiastic about leveraging this customer information to drive future sales and profits. At the same time, he notes that nearly three-quarters (72%) of BareBurger customers visit only once and that he urgently needs to better understand why (ANA conference, Fordham 2019).

With the advent of the Internet of Things (IoT), firms are increasingly focused on amassing and analyzing vast quantities of behavioral data to drive their marketing strategy, tactics and customer engagement. “Big Data” is defined as “huge amounts (volume) of frequently updated data (velocity) in various formats, such as numeric, textual, or images/videos (variety)” (Kaplan and Haenlein, 2019, p.15). Data science is appealing, as it provides elegant and defensible answers to messy questions. However, there are at least two problems with overreliance on algorithms: First, big data can help pinpoint what is happening, but not why. Second, big data focuses on those customers for whom data is accessible, and not on all possible customers. In short, consumer insights based upon big data alone may be limited in both depth and scope.

We argue that a complete understanding of the customer requires a firm to listen to their voices as well as watch their behaviors and to consider possible customers as well as those already acquired. To this end, we propose the Integrative Justice Model (IJM) (Santos and Laczniak 2009) as a theoretical and methodological framework. The IJM framework serves to deconstruct stakeholder perceptions of authentic engagement, specifically the extent to which actual and potential customers consider their voices to be heard and their values reflected in the firm’s business practices.

The Integrative Justice Model (IJM) (Santos and Laczniak, 2009) is a normative ethical framework inspired by the uptick in base-of-the-pyramid corporate marketing. The IJM proposes five tenets to ensure the fair and just treatment of low-income consumers. These five considerations are: 1) authentic engagement without exploitative intent; (2) co-creation of value; (3) investment in future consumption; (4) genuine interest representation of stakeholders; and (5) focus on long-term profit management. These tenets are distilled from thirteen frameworks in moral philosophy, marketing theory, management frameworks and religious doctrine (Santos & Laczniak 2009a, b; 2012). It is beyond the scope of this paper to examine how the IJM can be applied across varied domains and disciplines, however interested readers can read Laczniak & Santos (2011) for its application to Macromarketing; Santos,

In this paper we propose the IJM as a useful lens for assessing a firm’s fair and just marketing practices from the customer perspective. As a proposed outcome of these perceptions, we differentiate between three levels of consumer engagement with the firm, namely, transactional, relational, and transformational engagement. These levels of engagement are derived from organizational behavior theory in which employee engagement depends upon values congruence (Rich Lepine and Crawford, 2010) and fulfillment of the individual’s “psychological contract” with their employer (Cartwright and Holmes, 2006). We extend this model to values congruence between customers and the firm and hypothesize that perceived fulfillment of the IJM’s five tenets of fair and just business practices determine the nature of customer engagement. We further propose that customer usage moderates these effects (non-customers; lapsed customers; mid-use customers; high frequency customers).

We will conduct multiple phases of data collection to assess the theoretical utility of the IJM for capturing the full range of customer perceptions of a firm’s marketing practices and, in turn, how these perceptions translate to different forms of engagement. Our methods include integrating quantitative and qualitative primary research (open and closed ended BareBurger survey data and customer intercepts) with internal records (Bareburger’s behavioral data) and third party information (BareBurger’s appended data fields). When combined, these information sources support a deeper understanding of what has happened in the past along with possible reasons why. Additionally, we will consult secondary sources of feedback (social media, yelp and table reviews, news outlet commentary on BareBurger) in order to represent all possible perceptions of the firm such as those held by noncustomers as well as lapsed customers.

This multimethod plan is intended to generate consumer insights that overcome big data’s limited depth and scope of consideration. We extend the Integrative Justice Model and organizational theory to assess customer engagement outcomes, and assess normative expectations when targeting vulnerable consumers. Extant research has largely focused on subscription products to be able to track one-time subscribing customers, and why firms “lose” them. We broaden the conversation to include non-subscribing customers.

The managerial implications of this project are numerous: first, firms would be able to prevent big data myopia by acquiring a deep understanding of the consumer perceptions that are associated with their patterns of behavior. Second, firms would have a framework to listen to all customers (even non-customers) to assess levels of customer engagement and the degree to which values congruence is fostered. Ann Rubin, Vice President of Corporate Marketing for IBM, recently observed that no amount of objective data can compensate for missing the voice of the customer, causing IBM’s heavily data-dependent culture to return to this unstructured format. We argue that our proposed framework enables firms to rediscover the voice of customers and potential customers alike, with enhanced customer engagement as their mutual reward.

References


Macromarketing Pedagogical Challenges and Concerns: Listen, Learn, Leverage
Christine Domegan and Patricia McHugh, National University of Ireland, Galway

Abstract
The increasing dynamics, complexity and diversity of marketing, markets and societal problems calls for a re-examination of macromarketing pedagogical opportunities and the admittedly complex relationship between macromarketing and management at its infant stage of intellectual development. While macromarketing management is a disputed concept, the ‘theoretical glue’ that could provide exploratory logical binding to teach macromarketing to university business school undergraduates and postgraduates is the emerging body of MAS theory relating to marketing systems. MAS theory translates well into MAS practice, synthesising historical concepts with recent developments from analytical sociology, Ostrom’s (1990) work and systems thinking to present a solid teaching foundation for a macromarketing undergraduate course. Pedagogically, the time is ripe for Marketing to be presented to students worldwide as a provisioning mechanism in societies for private and public goods and services, embracing its macromarketing nature.

Key words: Marketing systems, macromarketing, complexity, dynamics, service learning pedagogics.

Introduction
There are few non-profit marketing courses offered by university business schools to their students. There are fewer marketing theory and philosophies modules available. When and where they are available, it tends to be offered to doctoral candidates. Rarer still are macromarketing and marketing systems courses taught to undergraduate students. This is a significant pedagogical and curricula deficient on behalf of marketing academics and business schools in light of the UN, OECD and WHO 2017 declaration that ‘systems thinking’ is the key leadership skill in the face of local-to-global problems such as poverty, obesity, health and wellbeing, climate change and sustainability.

The increasing dynamics, complexity and diversity of marketing and societal problems calls for a re-examination of macromarketing pedagogical opportunities and the admittedly complex relationship between macromarketing and management at its infant stage of intellectual development. How might we mainstream the teaching of macromarketing to undergraduate and postgraduate students? In a university business school context, one avenue to offer a macromarketing course is to link marketing with sustainability. Sustainable Enterprise by Peterson (2013) is the seminal exemplar of this approach. However, it remains targeted primarily to MBAs and has not translated into mainstream marketing curricula.

Another potential educational approach is to take any first or second year university business degree programme with its conventional marketing management micromarketing 4P course and build upon these micro foundations with a ‘macromarketing or marketing in a systems setting’ offering. Such an educational module allows one to capture the detailed complexity of micromarketing together with the dynamic complexities of macromarketing. The detailed complexity of Kotlerian marketing refers to conventional marketing issues such as stakeholder analysis, segmentation, targeting and positioning, market and customer research, alongside the development and execution of value-based propositions. The dynamic complexity of macromarketing covers issues such as interactions, interconnections, aggregate value creation,
triple bottom line and social justice as well as societal stakeholder engagements flowing from a macro to meso to micro and back again to macro levels (Shapiro 2016).

In essence, a pedagogical shift from ‘marketing management’ to ‘macromarketing or marketing in a systems setting’ represents a learning movement from linear thinking about markets, marketing, stakeholder engagement, value-based exchanges, competition and return on investment to systemic causation concepts incorporating principles of systems science and macromarketing such as social justice, stewardship, feedback societal stakeholders, collective behaviours, power and conflict relationships, value-action gaps and leverage points. Macromarketing education can present marketing as a provisioning mechanism catering for the diverse needs and wants of multiple stakeholders, including Planet Earth. It positions marketing as one provisioning mechanism, similar in character but different to public goods and associated provisioning mechanisms. Most importantly, based on recent conceptual developments, it can incorporate Layton’s award winning and seminal MAS theory with the focus on social mechanisms, (communication, cooperation, trust, scale etc.) stakeholder action fields and structures such as delivery and technology modalities. In practice, it represents a shift from a ‘design and implement’ or ‘command and control’ marketing strategy to ‘listen, learn and leverage’ macromarketing processes based on the ebb and flows of shared understandings, cooperation, communication, collaboration, power and conflict, cultural values and self-organisation.

This paper sets out to contribute a macromarketing course that facilities a marketing discipline and university business school transitioning from a conventional micromarketing 4P course to a macromarketing and/or marketing systems course via an interim Marketing Management in a Systems Setting offering at undergraduate and postgraduate levels. The paper begins with a review of Layton’s work as the foundation to marketing in a systems setting course. It then details an undergraduate course offering, including course objectives and relevant reading materials for cognitive development (Bloom 1956). Next, the discussion turns to the applied aspect of the course for affective development, a practical three part macromarketing plan - Listen, Learn and Leverage - to facilitate group macromarketing hands-on project work. Use is made of a service learning pedagogical framework for advanced understandings of ethical and sustainable exchanges in a marketing system. Feedback (qualitative and quantitative) from students who took part the course is then presented (n = 370). The paper concludes with a pedagogical discussion as to the challenges and concerns of teaching and assessing macromarketing.

Marketing Systems

For educational insights and content from the marketing systems school of thought, Layton’s (2015) award winning Mechanisms, Action and Structure (MAS) theory is essential reading. Layton’s MAS theory seeks to explain the linkages between individual or micro actions (e.g. exchanges and transactions) and meso or macro level phenomenon (e.g. delivery platforms and aggregate value creation) that incorporate all the system stakeholders and not just the firm-customer actors. A central part of MAS theory rests on four primary social mechanisms that operate among all stakeholders for value creation in a marketing system. These four primary social mechanisms are co-evolution, cooperation, scale and emergence forces at work among the stakeholder action fields in a marketing system (authors in press).

Understanding marketing systems and MAS is no easy task, let alone being responsible for its design, execution and management. Layton (2014) explains. In its earliest conception, marketing management was about ‘do and implement’ or ‘command and control’. Peter Drucker demonstrated marketing management evolved to mean leadership, marketing and innovation in the 1980s. As the world became more connected, networked and global, Paul
Kleindorfer and Jerry Wind (2009) and others confirmed the firm-centric view of management has lost relevance and the concept of network management more relevant and appropriate. Network marketing highlights self-organization, open innovation, building and sharing value amongst all participants and competition between networks. The attention is on effectiveness rather than efficiency and nudging a network or system in ways that are likely to enhance overall performance (Thaler and Sunstein 2008).

In terms of the present discussion, Layton (2014) agrees that the command and control typical of marketing management of the type Zif 1980 advocates, has no real marketing systems relevance or educational value. The complexity that most marketing systems interveners wish to influence goes beyond the scope of network management to an approach most consistent with shared or collective and collaborative management, to the heterogeneity of system participants and the evolutionary nature of their behaviours, beliefs and the social practices, influenced by the social mechanisms and the politics and values of the various stakeholder action fields, through a clear identification of value co-creation and value-based exchange processes. In essence, turning MAS theory in MAS management practice with all its associated detailed and dynamic complexities is difficult but possible if one listens to the marketing system, learns about its dynamics and leverages MAS elements.

A ‘Marketing Management in a Systems Setting’ Course

Pedagogically, the time is ripe for Marketing to be presented to students worldwide as a provisioning mechanism in societies for private and public goods and services, embracing its macromarketing nature. Marketing can be defined as a “complex social networks of individuals and groups linked through shared participation in the creation and delivery of economic value through exchange….. the primary purpose the creation and delivery to customers of assortments of goods, services, experiences and ideas, enhancing the perceived quality of life of the communities in which the marketing systems operate as well as providing economic benefits for each of the system participants” (Layton 2015 303/305). Macromarketing and management is no longer a ‘command and control’ function but about ‘listen, learn and leverage’ processes eminently teachable.

“Marketing Management in a Systems Setting” was a 5 ects 12 week course for second Commerce students in a large class context (n = 370). The course consisted of 24 x one hour lecture hall sessions, two per week over twelve weeks, and a hands-on group project equating to 125 hours of study. It was the second compulsory marketing module business school candidates undertook. The first course was a conventional micromarketing 4P introductory course in the first semester in first year.

The 12 week “Marketing Management in a systems setting” schedule was broken down into three theoretical and practical parts, Listen, Learn and Leverage. The first section concerned understanding what a marketing system is, its macromarketing nature and characteristics over the first 5 weeks by ‘listening to’ a marketing system through various analysis processes such as a PESTEL, stakeholder and exchange analysis. The second part of the course over three weeks and six lectures covered concepts (feedback mechanisms, time delays) and tools (causal loop diagrams) relevant to ‘learning about’ marketing system dynamics while the final course section, leverage, covered leverage points and ensuing the marketing 8P strategy (product/service, place, price, promotion, people, partnerships, planet and policy).

Each of the three Listen, Learn and Leverage marketing systems theoretical sections were reflected in and supported by a practical Listen, Learn and Leverage marketing systems workbook with associated tools, activities and exercises. Students had the option of engaging with free systems modelling and visualisation software to support marketing plan activities.
such as stakeholder and dynamic mapping. Library facilities such as database searches and writing were compulsory auxiliary support mechanisms.

The practical aspect of the course was premised on service learning pedagogic where the educational focus is on the integration of real experiences with learning and not merely the addition of experience to learning. A service learning shift is required of students, ‘in perspectives’ about their understanding of learning and serving and ‘in practices’ about the way a person learns and serves. In the context of a marketing management in a systems setting course, a service learning pedagogical platform facilitates a student’s ability to examine and experience macromarketing issues such as social responsibility, constructive engagement and reciprocity. Additionally, service learning co-creates projects with community partners as a microcosm of the power asymmetries present in macromarketing and marketing systems. The locus of control is with the student who has to transition away from a ‘tell me what to do mentality’ to collaborative and cooperative problem solving and critical thinking in line with Bloom’s taxonomy (Athanassiou, McNett and Harvey 2003).

In this course, the direct service learning component, in the shape of a marketing systems plan, was undertaken with a national organisation, with the marketing manager having prior local knowledge. Active travel, walking, cycling, scooters and outdoor clothing, were the focal marketing systems in a city context. The city budget for Active Travel initiatives was €2.9million (Dec 2018). The client set each group a marketing budget limited to €10,000 excluding product development and infrastructural costs.

Learning Objectives

Based on Layton’s definition of marketing systems above, the overall modular objective of the “Marketing Management in a systems setting” course was to expand and deepen a student’s understanding of the interactions, interconnections and interdependencies of markets and marketing, the key macromarketing concepts and their application in society, bridging the gap between macromarketing theory and practice. With marketing primarily as an applied discipline, student had the opportunity to apply theory and concepts for marketing management in a systems setting through the development of a marketing systems plan.

Knowledge based outcomes incorporated:

- A greater understanding of marketing management in a system setting theory and practice.
- The tools to look beyond buying and selling and focus on marketing’s role and responsibilities in society;
- The ability to map complex value-based exchanges and their dynamics that lie at the heart of marketing;
- Understanding the decisions and actions that organisations take in order to bring sustainable products and services to customers and clients and adding value through product, branding, and packaging decisions etc and
- Appreciate how marketing practitioners use marketing concepts and plan to make tactical and strategic sustainable marketing decisions.

Service Learning based outcomes incorporated the:

- Application of macromarketing and micromarketing theory and concepts to demonstrate problem-solving skills to a 'real world' managerial problem in a systems setting;
• An understanding the requirements of writing and referencing a professional marketing plan for a particular organisation;
• The presentation of key marketing points in a concise way;
• The management of teamwork and time schedules and
• Working in groups to specific deadlines.

Reading Materials


Learning Outcomes and Assessment
In this first reiteration of the course, a traditional unsighted written two hour examination was used for knowledge assessment. Question 1 was a compulsory marketing systems question. Students could select 2 out of three further critical thinking questions aimed at testing their cognitive understanding. The exam was worth 70% of the overall grade. Continual assessment was achieved via a group marketing systems plan worth 30% of the overall course grade. The group plans were marked by academics and the project client.

In-course student feedback incorporated in-depth interviews with class reps, a qualitative group reflection assessment for each group and a quantitative online survey (n = 370) assessing employability perceptions at the end of the course.

Course Topics
The introductory section of the course was about helping students to recognise, listen to understand and adopt a macromarketing and/or marketing systems perspective. This was achieved through an expanded macromarketing analysis. Candidates first identify all the barriers and enablers in relation to a chosen focal marketing system and second, categorise the barriers and enablers into forces currently at work in that marketing system. To do this, students listen to and learn about the characteristics of a chosen focal provisioning marketing system to undertake a marketing system setting analysis. This included a PESTEL analysis, a systems stakeholder analysis and an exchange analysis (embracing segmentation and competing choices analysis and an option harm chain analysis).
For example, a characteristic of marketing systems is that all marketing systems are embedded or nested within other marketing and non-marketing systems. Walking and cycling are subsystems of ‘Active Travel’ which in turn are nested within a transport system, alongside and juxtaposed adjacent systems such as car, bus, train and flight transport systems. Identifying and setting focal marketing system boundaries and engaging with its macro, meso and micro stakeholders ensures that all potential groups and individuals who can affect or be affected by the problem or issue in the chosen focal marketing system are considered.

Conceptually, students learn from Fisk (1967) and Layton (2015) who inherently recognise the limitations of a firm-centric stakeholder stance in fundamentally contributing to and understanding complex provisioning markets and marketing systems. With Peterson (2103), Laczniak and Murphy (2012), Werhane (2008; 2011), Geels (2002, 2005) and Freeman (2015), the call is for a move away from an instrumental organisation-centric stakeholder analysis with its goods-dominant logic where stakeholders are treated as operand resources to be managed (Vargo and Lusch 2004). Macromarketing authors suggest a move towards an orientation that embraces the multiplicity of diverse stakeholders where “numerous people, groups and organisations … where no one is fully in charge … instead many individuals, groups and organisations are involved or affected or have some partial responsibility to act” (Bryson 2004 p. 23-24).

In practice, to undertake a marketing system or societal stakeholder analysis, a critical step is to establish the focal marketing system of interest; identify who the key stakeholders are and what their current behaviours are. Setting boundaries and engaging with stakeholders involves mapping potentially influential actors, who can affect or be affected by the provisioning mechanisms of the focal system. These may include citizens, policy makers, industry, special interests groups, governments, charities, universities, aquaria, science centres, museums, the media and many others. Stakeholders control assets, information, communications, networks and can influence what people value or do not value. Occasionally, stakeholders can be the problem or barrier to leveraging the system. Four topics and related activities ensure in the applied project.

**Activity 1:** Identify the focal marketing system boundaries. A critical issue in this process is where to start – where to specify an initial set of boundaries. Begin with the ‘chosen’ focal/central system and draw a map of who is involved based on literature review findings. The first step is to identify and map the individual, community and broad policy bigger picture. Then look at adjacent systems that might interact with the focal system.

**Activity 2:** Brainstorm specific stakeholders, adding more stakeholders as they arise from marketing research. Activity 3: Classify Stakeholders. Once identified, stakeholders can be classified. A conventional classification method is Freeman’s primary, secondary and influencing stakeholders. A more valuable macromarketing classification scheme consists of Layton’s MAS groupings – incumbents, challengers and regulating agencies. Incumbents are the dominant organisations; they are happy with the way things are and wish to preserve the status quo. Challengers conform to the prevailing order, but are awaiting new opportunities to challenge the structure of the existing system. Regulating agencies are in the system to defend the status quo and to facilitate the smooth running of it.

**The final activity,** 4, is to identify stakeholder interests and benefits/barriers to participation in the focal system. The aim of this step is to gain a deeper insight, to ‘understand the nature of these stakeholders and why they should be further considered in the analyses’ (Bunn, Savage and Holloway 2002). This involves a power and influence description of all of the stakeholders who will either help or block change, their goals, motivations and interests, the benefits they perceive from changing their behaviour, as well as barriers to participation.
The results and outcomes of this ‘listening phase’ of the course and marketing system analysis included:

(1) A list of all the structural, behavioural and stakeholder barriers and enablers (MAS forces) currently at work in the chosen focal marketing system.
(2) A set of forces, themes and patterns at work in the focal marketing system.
(3) A stakeholder map showing all the relevant stakeholders (macro, meso and micro) in the chosen focal marketing system, by power and interest (Figure 1) and
(4) An exchange map highlighting the different market segments and exchanges between stakeholders at work in the focal marketing system (Figure 2).

![Figure 1 A sample student group stakeholder systems map in a focal Active Travel marketing system](image)
The second part of ‘Marketing Management in a Systems Setting’ course sought to generate a marketing system dynamics understanding and analysis. The aim of these 3 x 2 hour sessions was to (1) identify and map the market dynamics at work in the focal active travel market based on the macromarketing analysis findings. Students learn about causal loop analysis (CLD) and dynamics analysis to complement and expand the detailed complexity perspectives of the first section, market analysis and previous micromarketing courses. How so? Causal loop mapping and marketing system dynamics visualisation and modelling include (a) a focal marketing systems map of causal loops for the focal marketing system under investigation and (b) a narrative explaining the marketing system and interconnected forces or patterns at work in the focal system (Figures 3 and 4).

Cycling will create an increase in bicycles, which will reinforce the amount of cycling that takes place. An increase in bicycles will subsequently increase the theft of bicycles, which will in turn reduce cycling.
Figure 4 An example of a group’s focal Active Travel Marketing System Dynamics Map

The last section of the course is concerned with leveraging the learning from the marketing systems analysis and focused upon the marketing strategy - the macromarketing leverage points. The objective was for students to build upon their 4P knowledge, expanding the 4Ps to an 8P marketing strategy to disrupt the focal marketing system to a trajectory that favours the organisation competing in the system. Disruption was defined “an interruption in the usual way that a system, process, or event works” (Cambridge dictionary, 2019). In business and marketing, a disruptive strategy and/or disruptive innovation is designs and delivers an intervention that creates a new market proposition and value network and eventually disrupts an existing market and value network, displacing established market-leading firms, products, and alliances. The marketing strategy or management concern focuses on leveraging the deep MAS dynamics of the focal marketing system, enough to disrupt the existing dynamics that favours and positions the organisation as the dominant entity.

A disruptive macromarketing strategy involves students understanding the aggregate value creation/destruction of a focal marketing system and that it is not directly proportional to the value creation/destruction of its parts, that is, the various market segments and associated networked stakeholders (author in press). The disruptive strategy has ethical and sustainable roots and can have quality of life components, depending on the context and issues. Tactically, there is the selection of the appropriate target audience(s) and societal stakeholder partnerships to constructively engage, collaborate and leverage the market dynamics and MAS forces within the organisations’ capacity and capabilities. Students set SMART marketing objectives and designed an integrated marketing offering including Product/Service, Price, Place, Promotion, People, Partnership, Planet and Policy (Peterson, 2013). Implementation activities were set out
as well as a detailed marketing budget of €10,000. The results and outcomes of this final leveraging stage of the course included:

(a) An exchange proposition/offering positioned with the target audience(s)
(b) Long and short term SMART marketing goals
(c) Sample materials such as flyers, posters, product prototype etc and
(d) Time lines, milestones and budget (€10,000) allocation.

**Student Reactions and Feedback**

Qualitative group feedback was sought through 9 open-ended service learning questions (Bardus et al, 2018). The feedback sought to have students critically reflect on the group project, after it was completed, as to what worked, didn’t work and importantly, what they would do differently next time they undertook a marketing systems plan. For example, each group considered what they found to be the hardest part of the marketing is a systems setting assignment? A common answer pertained to understanding marketing system dynamics:-

“We found the casual loops the hardest. It took us a while to get a grasp of how to do them but once we got started on them it got easier to complete” (Group 11).

Group 35 concurred “As this was our first marketing plan, we encountered some issues with new terminology and maps such as the Casual Loops and understanding the true extent of the task assigned” as did Group 14 “We found the Causal Loops the hardest part of this assignment as it required a lot of trial and error and it was difficult to extract information from the literature and adapt it to our marketing plan. However, with the aid of Ricigliano (2016) reading, it became much clearer”.

Quantitative feedback was also undertaken in the form of an online survey. 71% rated the service learning group marketing systems plan experience as positive or very positive. Students also rated how well the service learning group assignment was perceived to provide the individual with a range of educational experiences with 1 being not at all and 7 being very much so. Cognitive dimensions such as problem solving and problem analysis and affective aspects e.g. communication, leadership and working in groups all scored on the higher end of the scale regardless of gender, career preferences and prior working experiences (Table 2).

*Table 2 Student perceived employability skills*
<table>
<thead>
<tr>
<th>Personal Growth</th>
<th>NOT AT ALL</th>
<th>(NO LABEL)</th>
<th>(NO LABEL)</th>
<th>(NO LABEL)</th>
<th>(NO LABEL)</th>
<th>(NO LABEL)</th>
<th>(NO LABEL)</th>
<th>VERY MUCH SO</th>
<th>TOTAL</th>
<th>WEIGHTED AVERAGE</th>
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<tr>
<td>Ability to Work with Others</td>
<td>3.37%</td>
<td>9</td>
<td>3.37%</td>
<td>9</td>
<td>7.49%</td>
<td>29</td>
<td>10.11%</td>
<td>27</td>
<td>17.23%</td>
<td>46</td>
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<tr>
<td>Leadership Skills</td>
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<td>12</td>
<td>5.26%</td>
<td>14</td>
<td>6.02%</td>
<td>16</td>
<td>15.04%</td>
<td>40</td>
<td>19.92%</td>
<td>53</td>
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<td>Communication Skills</td>
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<td>5.60%</td>
<td>15</td>
<td>4.10%</td>
<td>11</td>
<td>10.82%</td>
<td>29</td>
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<td>Understanding Cultural and Race Difference</td>
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<td>64</td>
<td>10.52%</td>
<td>29</td>
<td>13.43%</td>
<td>36</td>
<td>17.91%</td>
<td>48</td>
<td>13.30%</td>
<td>41</td>
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<tr>
<td>Social Responsibility and Citizenship Skills</td>
<td>8.65%</td>
<td>23</td>
<td>12.03%</td>
<td>32</td>
<td>15.79%</td>
<td>42</td>
<td>16.92%</td>
<td>45</td>
<td>22.93%</td>
<td>61</td>
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<tr>
<td>Community Involvement</td>
<td>6.79%</td>
<td>18</td>
<td>12.45%</td>
<td>33</td>
<td>12.83%</td>
<td>34</td>
<td>15.85%</td>
<td>42</td>
<td>20.38%</td>
<td>54</td>
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<tr>
<td>Applying Knowledge to the &quot;Real World&quot;</td>
<td>4.53%</td>
<td>12</td>
<td>5.26%</td>
<td>14</td>
<td>5.28%</td>
<td>14</td>
<td>13.21%</td>
<td>35</td>
<td>15.85%</td>
<td>42</td>
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<tr>
<td>Problem Analysis and Critical Thinking</td>
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<td>9</td>
<td>5.34%</td>
<td>14</td>
<td>5.34%</td>
<td>14</td>
<td>12.21%</td>
<td>32</td>
<td>16.79%</td>
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<tr>
<td>Social Self-Confidence</td>
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<td>11</td>
<td>5.22%</td>
<td>14</td>
<td>14.18%</td>
<td>38</td>
<td>16.42%</td>
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<td>Conflict Resolution</td>
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<td>36</td>
<td>18.80%</td>
<td>50</td>
<td>18.42%</td>
<td>49</td>
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<tr>
<td>Ability to Assume Personal Responsibility</td>
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<td>9</td>
<td>3.77%</td>
<td>10</td>
<td>8.58%</td>
<td>23</td>
<td>12.83%</td>
<td>34</td>
<td>22.64%</td>
<td>60</td>
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<td>Development of Caring Relationships</td>
<td>11.24%</td>
<td>30</td>
<td>6.74%</td>
<td>18</td>
<td>11.61%</td>
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<td>21.72%</td>
<td>58</td>
<td>20.97%</td>
<td>56</td>
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<tr>
<td>Gaining the Trust of Others</td>
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<td>5.97%</td>
<td>16</td>
<td>5.60%</td>
<td>15</td>
<td>18.28%</td>
<td>49</td>
<td>25.37%</td>
<td>68</td>
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<td>Empathy and Sensitivity to the Pain of Others</td>
<td>10.11%</td>
<td>27</td>
<td>4.87%</td>
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<td>9.74%</td>
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<td>23.97%</td>
<td>64</td>
<td>19.10%</td>
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<tr>
<td>Workplace Skills</td>
<td>7.12%</td>
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<td>6.37%</td>
<td>17</td>
<td>11.24%</td>
<td>30</td>
<td>17.98%</td>
<td>48</td>
<td>22.85%</td>
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<tr>
<td>Ability to Make a Difference in the community</td>
<td>7.49%</td>
<td>20</td>
<td>6.74%</td>
<td>18</td>
<td>10.49%</td>
<td>28</td>
<td>15.73%</td>
<td>42</td>
<td>24.72%</td>
<td>66</td>
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<tr>
<td>Skills in Learning from Experience</td>
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<td>3.00%</td>
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<td>8.99%</td>
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<td>13.16%</td>
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<td>2.63%</td>
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<td>5.64%</td>
<td>15</td>
<td>13.91%</td>
<td>37</td>
<td>19.55%</td>
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<td>Working from a Systems Perspective</td>
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<td>16</td>
<td>4.14%</td>
<td>11</td>
<td>8.27%</td>
<td>22</td>
<td>18.05%</td>
<td>48</td>
<td>16.92%</td>
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<tr>
<td>Working on Sustainability</td>
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<td>4.87%</td>
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<td>18.73%</td>
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<td>17</td>
<td>14.18%</td>
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</table>
Macromarketing Pedagogical Challenges and Concerns

The ‘marketing management in a systems setting’ is but one example of a way forward for macromarketing education and curricula. In this case, it was used as a transitional module to move from micromarketing to macromarketing mainstream teaching. Other possibilities exist. For example, social marketing curricula provide experience-based pedagogies that align well with the aims of macromarketing education (Radford, Hunt, and Andrus 2015). Marketing and sustainability courses are gathering momentum as firms grapple with environmental challenges and increasing demand for fair trade, green and recycled products and services.

The Challenges of Business School Cultures and Politics

As university business schools slowly adjust to and respond to the UNs 17 sustainable development goals affecting organisations and institutions around the world, political issues will and do arise. From a political perspective, moving from a micromarketing management syllabus to a marketing management in a systems setting has the advantage of progressing and advancing what is already on offer rather than having to radically change the existing curriculum offering. It can be perceived the path of less resistance and can be built upon year on year. For example, the success of the group assignment both cognitively and affectively, combined with employers seeking graduates with real work experience and/or internships has created the demand for in this pilot test to become a mainstream 5 ects offering with 60% of the grade going to a Listen, Learn and Leverage company marketing systems plan. The remaining 40% assessment will take the form of an individual theoretical marketing systems essay. The undergraduate offering has a corresponding 5 ects MSc in Marketing module, Social Marketing and Sustainability, where more advanced macromarketing knowledge and skills can be delivered and achieved e.g. path dependency and the historical development of marketing systems (Layton and Duffy, 2018).

Complexity and Causation Challenges

The majority of undergraduate marketing educational courses and assignments inherently present marketing as micro, mezzo or macro functions. However, as shown by macromarketing contributors from Zif (1980) to Layton (2015), it is a false classification with issues such as trust, collaboration, conflict, power, politics, cooperation and exchanges not confined to one level or another but all together and everything in between. Framing marketing education at one level, as micromarketing does, ignores the interactions, actions and reactions from other levels. Such events tend to be seen as external events in micromarketing, when in reality they are part of the world the student, the lecturer and organisations undertaking marketing activities, strategies and management are living in. Students are surprised in both project work and the real world when their marketing ideas and strategies do not work as well as expected and do not transfer to another context or do not scale up and scale out for success. Part of the explanation lays in their attention to the detailed complexity of most marketing initiatives and their ignorance, more importantly, of the dynamic complexities of marketing as a provisioning mechanism.

Defining marketing from a focal system perspective includes micro, mezzo and macro issues and macro perspectives e.g. nurses and flu vaccination live in a “hospital system” with hospital governance, policy, mass media issues (macro), wards and units (mezzo) as well as attitudes, beliefs (micro) and structural factors (macro). Macromarketing wise, more realistic strategy leverage points (in each level and across levels) are possible if a marketing systems approach with its dynamic analysis, is adopted. Performance and evaluation wise, hard and soft variables such as delivery mechanisms, policy changes, structural changes as well as beliefs and attitudes and actions and the interactions between all can be measured using qualitative and quantitative
methods and metrics such as conventional audience reach, market share, channel management, product portfolio management, share of heart and share of wallet as well as using structural equation modelling (SEM) and qualitative comparative analysis (QCA) to see if the “MAS system leverage points”, target audience(s) and stakeholder action fields has moved to a healthy trajectory.

In essence, micromarketing education with its detailed complexity presents an inherent linear model and understanding of marketing and markets, when in reality non-linear factors are at work as epitomised by macromarketing thought. Marketing provisioning systems are adaptable, flexible and ongoing with constant shifts and movements between Layton’s socially evolving mechanisms which are not mutually exclusive but collectively inclusive. The endless co-evolution of cultural and sub-cultural values underlying differing stakeholders, actions, reactions and interactions are the constant in a marketing system. Hence, the dynamic complexity and non-linear understandings and knowledge manifested by macromarketing, not micromarketing, is essential to disruptive marketing strategies and sustainable marketing provisioning systems.

The Criticality Challenges of Group Work and Associated Modelling Software

Group work is essential to macromarketing education. Deep macromarketing education is severely hampered without group work. Two pedagogical concerns arise. First, group marketing system model building demands the use of participatory and collaborative technologies to attract audience participation and partnership insight. MAS theory describes social mechanisms, such as communication and cooperation, linking individual to collective actions, and highlights the importance of collective endeavors in stakeholder networks (Layton 2015). Catering for wider societal stakeholder analysis and engagement also emphasises group techniques to go beyond the individual’s dominant social and marketing paradigms. Thus one of the main elements of marketing systems education is critical systems reflection based on empowering methodologies and team work for collective intelligence (Godsiff, Maull, and Davies 2018). A range of methods already exist in systems science and include Systems Practice (Omidyar Group 2017; Ricigliano 2012), Interactive Management / Collective Intelligence (Warfield 1974; Warfield and Cárdenas 2002), group concept mapping (Kane and Trochim 2007), and community-based system dynamics (Hovmand 2014; Williams et al. 2018).

The use of group model building in macromarketing is logical and promising. As such, group model building is an effective way of doing this via sharing mental models and insights, the use of collaborative, open and participatory methodology of system analysis, collective learning, consensus building and the buy-in, engagement and empowerment of multiple stakeholders with diverse knowledge and experience. This is assisted by relationship building, the incorporation of practice-based evidence, the use of modelling techniques and the practice of system mapping via feedback loops. Deep insight into system behavior via building feedback loop narratives can also occur as can system barrier/enabler analysis and easy compatibility with software packages (e.g. STELLA, Kumu and Mental Modeler).

The second group dimension relates to the soft skills employability of graduates. Organisations recruiting graduates seek individuals with transferable skills that allow them to contribute to performance immediately, such as active listening, negotiation powers and conflict management. The use of service learning as a supportive macromarketing pedagogical approach bodes well as a platform for internships, work placements and community projects. Service learning can deliver on the transferable skills companies look for in graduates as well as assisting with the development of cognitive and affective knowledge outcomes.
Conclusion

With firms, social enterprises, policy makers and citizens alike are actively embracing the UN’s 17 SDGs, the time is right to mainstream macromarketing and marketing systems education. This paper brings what Whetten (1989) refers to as the ‘theoretical glue’ that could provide exploratory logical binding for historical macromarketing writings and emerging MAS concepts relevant to macromarketing pedagogical needs for university business school undergraduates and postgraduates. It translated MAS theory into MAS practice, synthesising historical concepts with recent developments from analytical sociology, Ostrom’s (1990) work and systems thinking to present a solid teaching foundation for a transitional macromarketing undergraduate course, ‘Marketing Management in a Systems Setting’. Independently of whether one agrees with the notion of macromarketing pedagogical shift from a ‘do and implement function’ to ‘listen, learn and leverage processes’ and service learning project work is a valuable and viable mainstream avenue for undergraduate and postgraduate macromarketing teaching.

The synthesis of recent macromarketing and marketing systems intellectual contributions suggests that the theoretical link between macromarketing and strategy lies in the dynamic interactions, flows and processes of blended value exchanges - understanding what individuals and society value and genuinely catering for these local/global co-created values through long-term market and marketing processes. The ensuing pedagogical challenges, of business school cultures and politics, modelling software, group work and causation complexities are areas worthy of further exploration and research.

Although much work remains to be done in the area, MAS theory and its recent testing (Woolscroft 2018; Duffy et al 2017) provides a strong basis to begin a far more sophisticated appreciation of the relationship between macromarketing and its potential teaching. The pedagogical investigation between macromarketing and strategy leverage decision making is, very definitely, a “work-in-progress”. Despite being in its conceptual infancy, marketing systems and its leverage strategies offers substantive and significant opportunities for macromarketing as a discipline to deliver on the UN SDG goals and quality of life for all.

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Abstract

Social marketing in a systems setting and social marketing at a macro level is trending in the field among academics and practitioners alike (Birosacik et al., 2014; Domegan et al., 2016; Kennedy, 2016; Truong et al., 2018; Zurcher et al., 2018). The emergence and use of systems social marketing (SSM) and macro-social marketing (MSM) is an acknowledgment that the discipline is moving beyond its conventional micro or singular behaviour change intervention foundations towards more a holistic, systems based and systemic change mode of operandi for complex, sustainable problems such as the United Nation’s (UN) 17 Sustainable Development Goals (SDGs) or World Health Organisation’s (WHO) One Health challenges. The UN SDGs and WHO One Health problems are complex and dynamic behavioural issues with multiple causes and effects, spanning macro-meso-micro levels involving a rich diversity of stakeholders from citizens to policy makers in local-to-national-to-global contexts, requiring not just behaviour change, but social transformation.

The shift to a holistic change platform is not unique to either systems social marketing or macro-social marketing. Conceptually, the SSM and MSM movement towards more systemic thinking and methodologies represents the convergence and integration of their two parent disciplines, systems science and marketing (Brychkov and Domegan, 2017; McHugh and Domegan, 2013; Truong et al., 2018). The steady expansion and broadening theoretical tenants of the parent disciplines is mirrored in the sister discipline, macromarketing [see macromarketing special editions Marketing Systems (2019) and Macro-Social Marketing (2018)]. Neither is systemic broadening confined to marketing; it is evident in complimentary and adjacent domains such as behavioural economics, health psychology, environmental conservation, sociology (strategic action fields) and complexity. The systemic broadening, conceptual and empirical, spans multiple levels of behaviour and analysis: micro (individual-level), meso (dyadic and communities and networks), and macro (governments, policy and societies).

With explanatory integration gathering momentum in complimentary social sciences, social marketing often uses systems social marketing and macro-social marketing interchangeably. However, much remains nebulous about and between systems social marketing and macro-social marketing in theory and practice (Truong et al., 2018). What is the distinct subject matter of SSM and MSM? What phenomena serve as the focal point for change research and interventions? Are the underlying uniformities or regularities of SSM and MSCM the same? What are the basic methodological issues relevant to SMM and MSM? Truong et al. (2018) provide a critical analysis of existing publications (2000-2018) on systems social marketing (SSM), macro-social marketing (MSM) and other system-based approaches in social marketing. They conclude with a call for more dialogue and debate “within the social marketing field and beyond… about the role of SSM in addressing complex social issues and driving social change” (Truong et al., 2018, n. pag).

Our paper answers Truong et al.’s call and sets two objectives to contribute to:

1) conceptualizing SSM and MSM, by providing their working definitions, further uncovering their features, as well as seeking analogies and differences between them; and
2) broadening the scope of a systematic review and methodological critique of the SSM-related literature and interventions.

Method/approach

The research was aimed at improving the level of SSM and MSM conceptualization and raising their definitional clarity. This guided the literature search strategy and inclusion/exclusion criteria, which therefore relied on the following: (1) the afore-mentioned research aims; (2) previous, best practice, systematic literature reviews within social marketing (Carins and Rundle-Thiele, 2014; Kubacki et al., 2015; Truong et al., 2018); and (3) juxtaposition of concepts from a very broad palette of social and systems sciences. The latter meant juxtaposing ideas from a wide range of system thinking and the expansive domain of social marketing (together with its affiliated disciplines of marketing and macromarketing), social marketing systems and interventions (including social change, behaviour change and systemic change). The system palette broadness included, but was not limited by, a various systems science movements (General Systems Theory, systems dynamics, group model building, etc.), ideas, concepts, axioms, laws, principles and systems types. These referred to system processes, feedback, mechanisms, structures, contexts, environment, holism, interrelatedness, (multi-level, incl. micro, meso, and macro) interactions, triggers, outcomes, complex dynamics, complex adaptive systems, marketing systems, social systems, subsystems, etc. Keywords included the following: “System*”, “systemic*”, “system* science”, “system* thinking”, “system* theory”, “General System* Theory”, “Complex System*”, “systemic change”, “system* change”, “intervention*”, “Complex Intervention*”, “multifaceted intervention*”, “system intervention”, “Community based intervention*”, “campaign*”, “program*”, “Study”, “Studies”, “social marketing”, “Behaviour Change”, “system* change”, “Public Health”, “Environment*”, “Sustainability”.

We used the following databases: EBSCO, Emerald, Medline, ProQuest, PsycINFO, and Web of Science. Five independent researchers conducted this systematic review of the literature. The selected studies (n=56) were synthesised qualitatively using content analysis by application of the main inclusion criterion, which dealt with any affiliation of social marketing (and related concepts) to systems science (and related concepts). We excluded works where the systems science element was extremely poorly pronounced and where social marketing domain was irrelevant (see Figure 1).
Analysis included an iSMA, ESMA and AASM principles and concepts and SSM and MSM features and analogies. The actual congruence between social marketing and systems science is much wider than it is possible to show in any review. First, the disciplines of social marketing and systems science are both integrative, and they operate at the crossroads of several large theoretical streams, like marketing, macromarketing, political and policy sciences, psychology, etc. Second, social marketing interventions try nowadays to implement a holistic perspective, but also, by their definition and nature, rely on the analysis of various social systems via segmentation, targeting, formative research, stakeholder analysis, competition analysis, etc. Therefore, they might be considered systemic by nature.

Findings – conceptualization and definitions of systems-based approaches, SSM and MSM, in social marketing

There are a number of trends, which demonstrate the progress of systems thinking in social marketing relating to SSM and MSM.

**Trend 1: Social marketing interventions seek broader, more social, policy-oriented & long-lasting change.**

This trend became popular in social marketing writings in the early 2000s (Chair Beverly Schwartz, 2000; Interview with Beverly Schwartz, 2005; Smith, 2000, 2002; Wallack, 2002). Smith (2000) contributed to this discourse when he wrote about a false dichotomy between
individual behaviour change and social context, which were regarded by some as “opposing logic models” (p. 7). By this, he opposed the efforts to polarize the discussions about individual versus social context (Smith, 2000). Such an approach was truly systemic and in full conformity with multi-dimensionality principle of systems science. SSM also shares identical position, viewing social and individualistic changes as equally important and parts of a continuum of multi-faceted system-based interventions. Systems thinking fully manifests in the following words by Smith (2000, p. 8): “We need a simple logic model flexible enough to accommodate a wide variety of influences on individual behavior, not a framework that says there is individual and social behavior.” Likewise, McHugh and Domeneg (2013) advocated the need in holistic whole systems behavioural change, based on value exchange networks and co-creational relationships of multiple stakeholders, and revealed the danger of reductionistic approaches in affecting social systems.

Similar ideas were expressed by Donovan (2000), who advocated broader social change by influencing policy and governments in order to deal with population causes. He talked about “changes in the very structure of society” (Donovan, 2000, p. 56, emphasis added). The structural changes imply systemic changes, as structure defines the way in which elements in the system are related (Flood and Carson, 1993). Likewise, Lagarde et al. (2005) used an example of systems-based WEPIA water conservation initiative in Jordan as a successful effort going beyond individual behaviour change to examine systems and system dynamics, when project organizers soon discovered the futility of concentrating on purely individual changes. Young (2000, p. 53) talked about “not only changes within individuals but changes within systems – organizations, communities, cohorts, population segments, social networks, etc.”

In more recent times, one can observe how the above conceptual ideas on social marketing transitions to systems thinking found manifestation in specific projects like the one by Borden et al. (2018), describing a social marketing campaign targeted at organic food composting behaviour in US universities. It demonstrated a success only after transitioning to a more system-based approach occurred. Another recent initiative, which was aimed at supporting healthy eating and active living, was Food & Fitness (F&F) Initiative; it required large-scale systems change at many levels (Zurcher et al., 2018).

**Trend 2: Social marketing uses participatory & collaborative research, with multiple and societal stakeholders.**

The broadened focus of social marketing interventions is congruent with the need in collaborative and multi-stakeholder research. Bye (2000) strongly advocated “the need to mobilize multiple stakeholders for collaborative action” (p. 58) and “the need to involve target markets/audience in the process of change” (p. 59), pointing to the lack of relevant participatory marketing techniques. He stresses the indispensable character of such methodology in the light of the fact that typical problems require joined activities of “multiple sectors, interests, and institutions” (Bye, 2000, p. 58). This is also vital for building group cohesion, problem-solving orientation and achieving consensus, which adheres to the strategy of knowing, involving and empowering key stakeholders via different methodologies (Berard, 2010, McHugh et al., 2018).

**Trend 3: Social marketing needs more holistic and systemic methodologies.**

Among other things, “systems thinking capabilities include… using a broad array of tools to design high-leverage interventions for achieving system transformation (Zurcher et al., 2018, p. 15S, emphasis added). While developing strategic approach to social marketing, French and Blair-Stevens (2006) marked the underdevelopment of methodologies and tools for learning
systems. The same issue of social marketing has been reported in an interview with Schwartz (2005, p. 74, emphasis in original):

“Also, I think we have to realize that social marketing is not the only way to bring about change. Perhaps we should combine it with other change strategies or apply it in different ways. I guess I’m a little bit down about social marketing as a way to change systems and patterns. It has potential, but I just don’t feel that oomph behind it anymore.”

Definitions of MSM and SSM

We originate a definition for MSM, mainly on the basis of the work by Kennedy (2016), though early definitional efforts were made by Domegan (2008) and Wymer (2011). Truong et al. (2018, n. pag) position MSM as “the use of social marketing at up, mid and downstream levels to induce holistic systemic change.” We expand this to the following:

Macro-social marketing is an approach which integrates social marketing, institutional theory, systems thinking and other theoretical contributions to seek system-wide change through altering problem-perpetuating institutional norms of all actors in the system.

Alteration of institutional norms and social institutions, originating from cultural and social (marketing) systems and interacting with strategic actions fields and social mechanisms, is viewed as a central task of MSM and social change (Kennedy, 2016). The definition primarily refers to various macromarketing systemic theories, including Dixon’s work on marketing systems (Dixon, 1984) and Layton’s Mechanism, Action, Structure (MAS) framework of theory (Layton, 2015), especially in recognising the role of systems, social institutions, social mechanisms and strategic action fields (Kennedy, 2016).

Referring to systems social marketing (SSM) or systems-thinking social marketing, we acknowledge its very close proximity to MSM as both originate due to similar concerns (which we address below) and rely on closely-related theoretical sources. However, there are important distinctions between the two. We define SSM as:

Systems social marketing is an approach which integrates social marketing, Mechanism, Action, Structure (MAS) theory, and generic system methodologies to seek system-wide change through addressing the dynamics of all elements of a social marketing system.

Based on the above definitions and set of attributes, MSM and SSM are not the same.

Conclusion

Macro-social marketing (MSM) and systems social marketing (SSM) are not the same. We find macro-social marketing favours detailed complexity while systems social marketing leans to dynamic complexity with an appropriate detailed complexity in mind. The former implements highly complex linear causation of multi-level institutional interventions, while the latter rests on systemic causation seeking to listen to, learn of and leverage the dynamics of collective stakeholders and structural issues. We consider systems social marketing as an approach which not only absorbs systemic thinking in its wide sense, but directly uses systems dynamic theory / methodology.

References


The present study aims to analyze, through a decolonial perspective developed in Latin America, how and why Eurocentric consumerist practices were incorporated by Proeste, a consumer defense organization in Brazil. For this, a case study was developed, using primary and secondary data. The analysis shows the historical bonds between Proeste and international consumerist organizations; the organizational relationship between the Brazilian organization and its international counterparts; the mimetic practices adopted by Proeste in its comparative product testing practices; and the financing given by Euroconsumers to support the Brazilian operation. By adopting a decolonial perspective, it can be understood that helping to stimulate consumer protection in Brazil does not seem to be the main focus of consumerist organizations from the Global North. The maintenance of dominant control over the type of consumerism developed locally appears to be more important, in order to guarantee it is aligned to Eurocentric consumerist neoliberal principles.

Keywords: consumerism; decolonialism; neoliberalism; globalization; emerging economies
A social marketing campaign for gender equality in the workplace

Sarah Maree Duffy, Aila Khan, Patrick Van Esch and Meg Smith

“Why, after all these decades of campaign, reform, research and thought about how we can best get women into the workplace, are we so slow to pick up that the most important next step is how to get men out of it?” Crabb, 2014

Introduction

Australian journalist Annabelle Crabb made waves in 2014 when her book was released suggesting that Australian women need wives and Australian men need lives. Underpinning this suggestion is the idea that women are held back in the workplace as they shoulder the majority of responsibility that comes with raising children and looking after a home. It’s been shown that men would like to spend more time with their children (Parker and Wang, 2013) but there are structural and subtle obstacles that are preventing this from happening (Lewis, 2009; Craig and Mullen, 2010). That is, fathers are embedded in an ecological social system that involves the performances of particular behaviour and that exists within a particular historical, social, cultural, physical and environmental setting (Brennan et al. 2016). The gender imbalance at home and in the workplace is a self-reinforcing ecosystem that seems unlikely to change without some effort. In order to work towards gender equality (Goal 5 of the UN’s SDGs) we have designed an intervention that seeks to first study the social and cultural setting and then disrupt the status quo by changing the physical settings and creating a celebratory narrative around fathers in the workplace. Issues related to gender equality fits firmly within the bounds of macro-social marketing defined by Kennedy and Parsons (2012) who state that macro-social marketing is about systemic change through altering the institutional norms that perpetuate a problem (Domegan, 2008). Gender equality will not be achieved without a systemic approach. This paper is structured as follows: first a review of the literature relevant to the issue focusing on Australia, second an explanation of the planned intervention and finally an overview of the research site. The aim of this paper is to demonstrate how a social marketing approach may be helpful towards improving gender equality in the workplace.

The problem: A stalled gender revolution

More than non-parents, parents have a gendered division of labour, with the burden of unpaid domestic labour and caring responsibilities largely falling to women (Craig and Mullen, 2010). Research into parenthood, gender and work-family time across the United States, Denmark, France and Australia found that Australia was the country where the presence of children was associated with the greatest increase in a gendered division of labour (Craig and Mullen, 2010). Although – formally – Australia has equal opportunity legislation, social policy and norms tend to reinforce traditional gender roles. This research fits more broadly with work showing a “stalled gender revolution” (Cotter et al. 2011), which means that egalitarian attitudes slowed in the 1990s.

This situation is confirmed by the Australian Bureau of Statistics (2017) which highlights that just one in 20 fathers takes primary parental leave, with 95% of all primary leave taken by mothers. This statistic signals that within Australia it is likely there are both overt and covert structural barriers for men to share caring responsibilities. Inequality in caring responsibilities can have a range of consequences including dissatisfaction with work-family balance for both mothers and fathers, with organisations operating at a diminished capacity (Craig and Mullen, 2010; Lewis, 2009; Noonan et al. 2007). Research has shown that early involvement in caring responsibilities can establish greater parental involvement over time (Nepomnyaschy and Waldfogel, 2007). The consequence might be that men taking less parental leave could reduce women’s long-term, paid labour (Noonan et al. 2007). Additionally, taking parental leave
negatively affects employers’ perceptions of hireability and career commitment of mothers but not of fathers (Morgenroth and Heilman, 2017; Williams and Ceci, 2015), potentially hampering women’s career development. Best practice recommendations for parental leave policies specify that benefits must be equally available to all employees, regardless of their gender and/or caregiver status (Rau and Williams, 2017).

Father-involvement is beneficial for their children. Fathers interact with children differently than mothers (Parlakian, Rovaris and Young 2009), the importance of which is underlined in ‘In Daddy’s Arms I am Tall’ (Abiade 2013). They tend to engage in more physically stimulating play which can help children develop independence, self-regulation, and gross motor skills. Fathers shape children’s development in other ways too. Research has shown in families with two working parents, if a child’s father used a more varied vocabulary with him or her at age 2, the child had greater language skills at age 3 (Frank Porter Graham Center 2006). In addition, research showed that greater complexity in father-toddler play predicted better cognitive and social developmental outcomes for young children (Roggman et al. 2004). In view of the acknowledged benefits discussed above, there has been an increased focus on celebrating the role of Dads. In 2018 Unilever USA topped the newly created “Best Companies for Dads” list, showing that our conversation around gender equality in the workplace is expanding.

Generally speaking, gender bias in the context of promotion, performance evaluation, hiring and pay often works to the advantage of men (Heilman, 2012; Joshi et al. 2015; Koch et al. 2015). However, globally men are less eligible for and take parental leave less often than women (Organisation for Economic Co-operation and Development [OECD], 2016; The Council of Economic Advisors, 2014). When there are pressures felt from both work and family and one’s responsibilities in each sphere feel mutually incompatible work-family conflict arises. That is, “participation in the work (family) role is made more difficult by virtue of participation in the family (work) role” (Greenhaus and Beutell, 1985, p. 77). Work family conflict is related to health problems, higher healthcare costs, lower organizational commitment, lower job satisfaction, and greater intentions to leave the organization (Allen et al. 2000).

A Macro-Social Marketing Intervention: “Everyday Heroes”

The aim of this paper is to describe a macro-social marketing intervention that works towards achieving gender equality, aligning with Goal 5 of the United Nations SDGs. The intervention takes place within a large organisation (which for privacy reasons will remain unidentified). It adopts a systems view and seeks to work at both the individual and the macro level to encourage the equal division of caring responsibilities, changing the existing institutional norms (Duffy et al. 2017a). There is a process at work that is generating obstacles to engaging in caring responsibilities for fathers in the workplace. This means that within the organisation a shared reality has been created, complete with an agreed set of rules and social norms of behaviour and sanctions for those who do not comply (Duffy et al. 2017b). At the individual level we intend to celebrate fathers who access flexible working arrangements or other types of leave that allow them to meet their caring responsibilities.

This intervention is designed to first celebrate fathers in the workplace to encourage a more positive framing of their choice. Second, we intend to benchmark the internal policies at a macro level against best practice to understand how internal policies and structures can be best changed to work towards gender equality. Finally, we will measure attitudes towards fathers in the workplace both before and after our intervention in order to evaluate the effectiveness of the campaign. Macro-social marketing seeks to create different system wide normative frameworks (Kennedy, 2016). However, we recognise that entrenched attitudes are unlikely to
change drastically after one intervention. This intervention aligns with the UN’s Goal 5, specifically target 5.4 sets the following objective:

“Recognize and value unpaid care and domestic work through the provision of public services, infrastructure and social protection policies and the promotion of shared responsibility within the household and the family as nationally appropriate”

More specifically we intend to (over a 12 month period):

1. Survey the staff with a father in their team to understand their attitudes to fathers in the workplace in particular, with reference to the father’s: employee competence, employee commitment and employee engagement – and contrasting their attitude to mothers in the workplace along the same criteria (before the campaign)
2. Launch an organisation wide ‘pin-up calendar’ on Father’s Day 2019 celebrating fathers (“Everyday Heroes”) who access institutional support for their caring commitments
3. Measure qualitative and quantitative employee responses to “Everyday Heroes” images, specifically with reference to perceptions around employee competence, employee commitment and employee engagement
4. Formally report on the campaign

Individual organisations have a positive role to play in improving gender equality. Research has found that men’s use of parental leave is significantly affected by organizational culture including the company's commitment to caring values, the company's level of 'father friendliness', the company's support for women's equal employment opportunity, fathers' perceptions of support from top managers, attitudes of colleagues and fathers' perceptions of work group norms that reward task performance vs. long hours at work (Haas et al. 2002).

Fathers in Denmark spent the closest amount of time caring for children as mothers do, which is believed to be the result of institutional support for mothers to work, policy encouragement for fathers to be involved in childcare and positive social attitudes supporting gender equality. This may explain why mothers in Nordic countries report higher rates of satisfaction with work-family balance than mothers elsewhere (Lewis, 2009). This demonstrates that the policies of and workplace culture created by organisations is key to systemic macro-social change.

The Research Site

Although parental leave policies are available to both genders at the site of study, previous internal research confirms that men are reluctant to access the leave due to negative perceptions from colleagues if they do so. Work-family conflict (Allard et al. 2007) has not been measured as a part of this project, however due to its relevance and significant impact on the workplace it is suggested that future research does. Figures obtained from the organization’s HR department verify that there is a disparity between the number of men and the number of women accessing leave to support caring responsibilities. We note that there is a positive upward trend in the number of men accessing partner leave. However, the difference shown in Figure 2 in particular highlights the need for research to better understand this trend.

Furthermore, there is a significant disparity between the leave offered to men compared to women when a new child enters the family, even if the father is the primary care giver.
These figures confirm that gender inequality is present. This organisation is forward thinking and are seeking to change this by investing in research that aims to bring about gender equality. This campaign is possible due to funding from the organisation itself.

**Conclusion**

We intend our intervention to encourage a positive shift in perception towards men with caring responsibilities with the end goal of generating macro-social change to achieve greater gender
equality. By studying responses to our promotion celebrating “Everyday Heroes” we aim to better understand attitudes to men with caring responsibilities at our site of study. As a consequence, with this information the organisation can enact policies and interventions to foster a more diverse and inclusive workplace. We are cognizant that gender equality will not happen after one intervention, however this campaign may be a useful first step in changing the way fathers who engage in caring responsibilities are perceived and supported in the workplace and may have a cascading effect on other fathers to feel confident to access the institutional supports available. Further, if successful this intervention may inform future campaigns since as mentioned at the outset of this paper, gender equality is not isolated to one organisation or Australia alone. A recent extensive study in the United States found that people’s views differed on equality depend on the context, that is one quarter of respondents believed in gender equality in the workplace but not at home (Scarborough et al. 2018). To change these ideas there needs to be structural changes that are blind to the gender of the parent and interventions to target the subtle ways that prevent men from taking up institutional support in order to engage in caring responsibilities.

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The Complicated Task of Teaching Marketing Systems
Sarah Duffy & Andrea Laurence, Patrick Van Esch Western Sydney University

“In marketing education, teaching students how to use a toolbox has become the totally dominating task instead of discussing the meaning and consequences of the marketing concept and the process nature of market relationships. Marketing in practice has to a large extent been turned into managing this toolbox instead of truly exploring the nature of the firm's market relationships and genuinely taking care of the real needs and desires of customers.” Gronroos, 1994

Unfortunately, not a lot has changed since 1994. The prevailing wisdom remains that students of marketing need to be taught various lists of Ps (McCarthy, 1960; Kotler, 1986; Booms & Bitner, 1982; Collier 1991) in order to be prepared for a future in a business. However, as pointed out by Gronroos (1989) the marketing mix and the 4 Ps reflects a product-oriented rather than a customer-oriented approach. Key management thinkers have described the pitfalls of this type of thinking in detail and have articulated a fruitful way forward in the form of Design Thinking, the Business Model Canvas and “Jobs to be Done” (Brown, 2009; Osterwalder, & Pigneur, 2010; Christensen, et. al, 2005). These ideas have their origin in the work of key marketing scholar Theodore Levitt on Marketing Myopia (1960). These management scholars have operationalised Levitt’s thinking and developed tools that are useful to practitioners who wish to enact a customer-orientation philosophy. However, they are theories that are best used in conjunction with a marketing systems approach, since the focus their analysis at the firm level, with only a cursory glance towards the broader system the firm exists within.

Diagnosing how the marketing discipline became set on this path is outside the scope of this abstract. However, it is important to provide some context to establish why I have drawn on the work of management scholars to teach a customer orientation philosophy as part of the marketing systems course I teach. I am a lecturer at Western Sydney University and I feel lucky to teach the post-graduate subject, “Marketing Systems”. The class is taught in a weekly four-hour class over ten weeks covering some of the following topics: customer orientation, power and marketing systems, social mechanisms and marketing systems, history and marketing systems. The composition of the student cohort is predominantly international. For the majority of the student cohort, English is their second language. Our University has adopted a “flipped classroom” approach and has physically structured the classrooms to ensure this is how courses are delivered. The two challenges I have experienced in teaching the subject are linked. The first is how to convey complex information simply and second how to overcome the reluctance of students to reading academic papers.

Conveying complex information simply is a task most teachers wrestle with. This issue is in part complicated by students’ expectations of the class. Most students enter the course expecting to learn about advertising, selling and digital marketing. It take some time to unwind these expectations and then to re-orient their efforts towards the task of understanding marketing systems. Many of the students struggle to conceive of marketing systems as “marketing”.

The second issue does not help the first. The lack of a textbook and teaching materials beyond academic papers adds to the challenge of teaching this subject. Most students are resistant to reading academic papers and I have some sympathy for this sentiment. Academic papers are not written for a student audience and they are not written to be easily understood. However,
academic papers are the primary resource available for students since there are no textbooks that focus on marketing systems and even if there was a textbook, my University no longer wishes to use them. The work of the management scholars mentioned in the opening paragraph have been popularised and are packaged in much more digestible formats including HBR papers and short youtube videos making it readily understandable and comprehensible for students. To work towards making marketing systems ideas more “digestible”, I have been collaborating with our digital team and have created videos to simply (and quickly) convey key marketing system concepts. The reactions and responses to these videos will be the subject of my presentation at the Macromarketing Conference in 2019. The data is yet to be collected so I am unable to present it in this paper. However, I will supply an updated version of this paper with results and analysis for the conference. I will be teaching Marketing Systems from April to June of this year and intend to collect qualitative responses to the following questions:

1) In a few sentences describe what you understand marketing to be?
2) How do you like to learn? Please mention the materials that best help you to learn eg. powerpoint slides, textbook, in-class lecture, in-class discussion, in-class activity, academic papers, practitioner articles (ie. HBR or other reputable sources), videos
3) Which materials from this course helped your learning? (eg. In-class activities, case studies, academic papers, videos, powerpoint slides).

In order to overcome the challenges experienced in teaching marketing systems this data will be collected, analysed and reported with the goal of improving the future teaching of this subject. The higher education environment, like marketing systems is a complicated setting which we will never “understand”. Like a marketing system, higher education is in a continual state of flux and as educators we need to continually reflect on our practice and seek feedback to ensure we are delivering our students with the best possible educational experience.

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An Analysis of the Relationships between Macro-Structural Factors and Bribery based on Economic Development

Ahmet Ekici, Bilkent University- Ankara/ Turkey (contact person)

ekici@bilkent.edu.tr

Sule Onsel-Ekici, Dogus University- Istanbul Turkey

sonsel@dogus.edu.tr

The effects of economic development on markets and marketing have always been an intriguing topic for macromarketers (e.g. Hult et al. 2018; Kilbourne 2004; Mullen et al. 2009; Sandikci, Peterson, and Ekici 2016). One specific area of these effects involves marketing/business ethics. Macromarketers, although to a lesser extent, have also discussed/studied ethics-related implications of development (e.g. Ekici and Onsel 2016; Laczniak and Santos 2018; Priddle 1994). This paper aims to contribute to this line of literature by delineating a “system” of corruption/bribery for various economic development stages. Furthermore, through what/if scenario and sensitivity analyses, we aim to provide tools as well as recommendations for macromarketing scholars, practitioners, and policy makers in their attempts to cultivate better functioning markets that can contribute to the societal flourishing.

Various factors have been identified to impact the level of bribery activity in a given country, with the most-studied being economic, political, and cultural factors. It has been argued that corruption in a nation is a function of its economic development (e.g. Husted 1999; Theobald 2002). In addition, as Nwabuzer (2005) and Olaya (2006) argue, more-developed economies have well-established institutions and policies to deal with corruption. In poorer countries (where government officials are usually underpaid), bribery may be viewed as a form of salary supplementation, a natural way of ensuring someone’s standard of living. Furthermore, the level of literacy, education, freedom of press (media), property rights, political rights, and economic freedom may also be linked to higher/lower levels of corruption (e.g. Husted 1999). These studies have pointed out the possible link between institutions/structural factors and the bribery activities, however, lacked an empirical evidence that demonstrate how various macro structural factors interact and explain the bribery in countries with different economic development stages.

Scholars have also come to the conclusion that bribery is a systematic problem and can be better understood and possibly better addressed through studies that take a systems approach. As Ryan (2000) pointed out, understanding and combatting corruption/bribery would require a shift in our approaches to the problem. That is, instead of blaming a single factor such as culture or education, a more comprehensive understanding of the interplays among a host of macro factors including economic development, political and competitive environments would yield more fruitful insights for managers and policy makers alike. With a few notable exceptions (e.g. O’Higgins 2006; Riley 1998) however, the current understanding of the relationship between bribery and economic development lacks a systemic perspective.

To fill these gaps in the literature, the current research takes a systemic approach, and through the use of Bayesian Networks (BNs), empirically investigates the linkages between economic development and bribery through a host of political, administrative, competitive, and other structural factors (e.g. market-structure, crime- and-violence, financial system). Using World Economic Forum (WEF) data collected from over 14,000 business executives in more than 140 countries, this research: 1) identifies factors related to bribery activities, 2) empirically identifies a structural model that delineates the probabilistic dependency relationships between
bribery activities and other structural factors, 3) specifies the factors that have the greatest explanatory power on bribery activities, and 4) interprets findings based on a country’s development stage.

As such, our aim goes beyond merely identifying factors and delineating the relations among them; we also aim to quantify the relationships of the system properties so that macromarketing researchers and policy makers can run ‘what-if’ scenario analyses to determine the effect of a change in one (or more) factors on others in the network for various development stages. In other words, the model we develop can be used as a diagnostic tool for researchers and practitioners in their attempts to understand and reduce bribery activities across the world which potentially result in fairer functioning of markets.

To determine the factors related to the bribery (Irregular Payments and Bribes) variable, we gave seven academics expert in business/marketing ethics the list of variables used in the WEF’s Global Competitiveness Index (GCI) and asked them to choose the concepts that they thought were most related to Irregular Payments and Bribes in a given country. The expert panel determined the following seven variables to be related (affected by it or affects it) to Irregular Payments and Bribes in a given country. Diversion of public funds (DPF); Public trust of politicians (PTP); Favoritism in decisions of government officials (FDGO); Burden of government regulation (BGR); Business costs of organized crime (BCOC); Reliability of police services (RPS); Intensity of local competition (ILC)

To identify the effect of the cluster (i.e. economic development stage) that a country is in, we also included a variable called “Cluster” in the analysis. In each year, WEF clusters the countries into three stages of development: Stage 3-Innovation Driven, Advanced Economies; Stage 2- Efficiency Driven, Developing Economies, and Stage 1-Factor Driven, Underdeveloped Economies (WEF 2018). The data related to these nine variables were gathered from the GCI from 2010 to 2017. In the second stage of the proposed methodology, to determine and analyze the relationships between bribery activities and other factors (e.g. political, legislative, competitive,) we constructed a network model using a BN (Figure 1). As of today, we have fully completed the scenario and sensitivity analyses of the data for all the three economic development stages. Our conference presentation will focus on economic development level results (Figure 2) and their interpretations and implications for macromarketing ethics.
Figure 1. BN of the bribery system after structural learning

Figure 2. BN of the bribery system after parameter learning
References:
Applying the Integrative Justice Model to Predict Transformative Impact: The Case of Jesuit Worldwide Learning, Higher Education at the Margins

Tina M. Facca Miess, PhD, John Carroll University, USA
Nicholas J.C. Santos, SJ PhD, Marquette University, USA

In light of increased corporate engagement in low-income markets, characterized as the base-of-the-pyramid market, Santos and Laczniak (2009b) develop a normative ethical framework labeled as the Integrative Justice Model (IJM). The IJM postulates five inter-related components that are essential for treating poor consumers in a fair and just manner. These five elements are: 1) authentic engagement without exploitative intent; (2) co-creation of value; (3) investment in future consumption; (4) genuine interest representation of stakeholders; and (5) focus on long-term profit management. The elements are arrived at through an examination of thirteen frameworks in moral philosophy, marketing theory, management frameworks as well as religious doctrine. It is beyond the scope of this paper to elaborate on the derivation of the IJM and the normative theory building process it followed. These can be found in Santos & Laczniak (2009a, b; 2012). It is also beyond the scope of this paper to examine the application of the IJM to various domains. Interested readers can read Laczniak & Santos (2011) for an application to Macromarketing; Santos, Laczniak & Facca-Miess (2015) for an application to transformative justice and Santos (2013) for an application to social entrepreneurship.

Here we analyze a Jesuit initiative known as Jesuit Worldwide Learning: Higher Education at the Margins (JWL) through the lens of the Integrative Justice Model (IJM) with a special focus on transformation in quality of life (TQL). While tertiary education clearly facilitates employment opportunities, the organization (JWL) focuses on developing leaders who will stay in or return to their communities as transformative leaders and change agents. Longitudinal, qualitative research is critical to assessing long-term impact, yet what research methods can help the organization validate its shorter-term impact so as to satisfy funders that their resources are well-spent and yielding transformative results?

Using an online survey tool, distributed to varied JWL stakeholder groups, the tenets of the IJM are measured using items based on the decision principles outlined by Santos and Laczniak (2012), and later statistically vetted by Facca-Miess and Santos (2015). Items were adapted slightly to the context of the “margins,” namely refugee camps and post-conflict settings where JWL operates. Several iterations of factor analyses with data from a relatively comparable setting with marginalized, vulnerable consumers (i.e., homeless shelter) yielded the final items used for this study. This paper focuses on a segment of responses, those from students and alumni (beneficiaries) to better understand the drivers of the perceptions of the extent to which their experiences with JWL transformed their quality of life (TQL).

Each of the tenets of the IJM are subjected to multiple regression analyses to identify the significant predictors of beneficiaries’ overall rating for the tenet. For example, “overall, I feel engaged with JWL” is the dependent variable with the various decision principles for authentic engagement with non-exploitative intent (AE) as independent variables. After building regression models for each of the tenets, inclusive of amplifying the voice of the consumer (AVOIC, see Facca-Miess and Santos, 2015), a final multiple regression model is built to identify the significant predictors of transformation in quality of life. TQL is the dependent/outcome variable, and the various significant predictors of the various tenets of the IJM as independent variables. The Integrative Justice Model is used to evaluate the predictors of transformative justice as delivered by Jesuit Worldwide Learning, serving higher education at the margins. Summative highlights for each of the tenets of the IJM follow:

*Authentic Engagement with non-exploitative intent:*
In order to ensure perceptions of AE, JWL needs to maintain a focus on ensuring beneficiaries feel respected. Further, it is critical that JWL explicitly and consistently considers the needs of the people in each of the communities it serves, reflective of the JWL cornerstone highest quality, fiscal stewardship grounded in student (and community) feedback. Community-based research is foremost on the JWL research agenda, and should ultimately be conducted by well-trained, certified, local researchers from JWL Community Based Organizations (CBO).

**Value Co-creation**

To continually increase perceptions of VCC, JWL can highlight its trust in students by continuing to share resources (e.g., taking home tablets to study), and focusing on the shared values among the various cultures and religious traditions served by JWL. The impact of alumni engagement at all levels cannot be underestimated, particularly given the predictive capacity of values alignment.

**Interest Representation of Stakeholders**

The extent to which beneficiaries agree that JWL views challenges at the margins as opportunities for innovation, is the most explanatory and most significant predictor of the extent to which beneficiaries feel their interests are represented. This aligns with the JWL cornerstone of global thinking with transformative perspective, integral to Jesuit higher education. Volunteering in one’s community adds to the explanation of variance in overall perceptions that JWL understands what is important to its beneficiaries.

**Investment in Future Consumption**

Fascinatingly, the most significant predictor is JWL experiences help me understand my responsibility to contribute to the good of my community explaining over half of the variance in perceptions that JWL facilitates development that makes beneficiaries’ lives better. This recognition of one’s responsibility to contribute to the good of the community, coupled with the extent to which one agrees my experiences with JWL are worth my time spent, explain nearly 60% of the variance in perceptions that JWL makes one’s life better. These predictors suggest JWL is effectively investing in the future of its beneficiaries, providing a transformative and valued higher education experience.

**Amplifying the Voice of the (Marginalized) Consumer**

The extent to which beneficiaries feel their opinion is valued is the most significant predictor of overall feelings that one’s voice is heard at JWL. Again, a continued focus on developing training and curriculum on research methods and statistical analysis can further integrate the highest gifts of justice into JWL’s offering to the marginalized. Equipped with skills in research and analysis, beneficiaries can advocate for themselves, with guidance from JWL on its advocacy efforts on behalf of stakeholders.

**Transforming Quality of Life**

Values alignment is the most significant predictor of TQL, while helping beneficiaries understand their responsibility to contribute to their community explains over 60% of their perceptions of JWL’s ability to impact their quality of life. Programs and services relevant to beneficiaries needs, coupled with perceptions that JWL views challenges at the margins as opportunities for innovation, completes the model. Essentially, these elements should be highlighted in fundraising efforts, marketing messages and commitments to beneficiaries. For example, when asked how JWL transforms quality of life for beneficiaries, it is proven here that “JWL views the challenges at the margins as opportunities for innovation by providing a values-based education, with relevant academic programs and services that instill a sense of responsibility to others and community.”
The IJM, applied this way, yields ample statistical evidence measuring JWL’s outcomes and their impact on its beneficiaries. Further, we have identified the drivers of these outcomes and explained the impact that a focus on these drivers will have on continued improvement toward delivering transformative justice through higher education at the margins.

References:


What Have We Done to Our Wheat? God Didn’t Make it This Way: Rethinking the Roots of Gluten Issues

Tina Facca Miess, John Carroll University, USA
Carole Doueiry Verne, St. Joseph University, Lebanon

What is wrong with this picture? Industry reports (Markets and Markets 2018) captivate our oftentimes unconscious capitalistic view with the headline “Gluten-free Products Market Worth $6.47 Billion by 2023” supported by now-common subtitles such as “Bakery products segment is estimated to be the largest in 2018” and “Conventional stores segment is projected to be the largest & fastest growing during the forecast period.” And of course the report provides myriad verifying statistics that should thrill food marketers. But ultimately it is not so thrilling for those who suffer from gluten intolerance or Celiac disease or the mothers who struggle to find options for their gluten-intolerant or diseased children. A gluten-free niche market provides resources to tolerate, but does nothing to address the root issues of a tainted global supply of wheat. Some academic environmentalists suggest that up to 70% of the global supply of wheat is affected by glyphosates, toxic pesticides used to promote growth and ripening while killing pests.

The authors are not environmentalists, chemists, or medical professionals, but we are macromarketers taking a step back, and asking the big-picture question of why? We will review the state of the gluten-free industry as well as corporate responsiveness to elimination of glyphosates. This work aims to 1) move macromarketers closer to understanding the root causes of gluten intolerance, 2) stir an interest in addressing them, and 3) make recommendations for continued research to drive policy change. We investigate the recent history of the gluten-free market and perceptions of its effectiveness. We will execute qualitative interviews with upstream specialists (doctors, nutritionists, etc…) to garner their points of view. Then, our primary research with international respondents (USA, Barcelona and Lebanon), will assess downstream attitudes and behaviors as well as perceptions regarding the gluten problem so to speak. We analyze consumers’ understanding of gluten intolerance issues, the proposed market-based solutions, as well as their understanding of root causes in order to address some preliminary conclusions.

Armed with such analyses, we aim to provide feasible policy recommendations for the global food industry that will serve as more humane long-term response and address continued research into the root causes of gluten issues.

Further, is it possible that the 30% of untainted wheat is stewarded by the poor, small-farmer, in more remote locations? This would imply a highly valuable remaining resource of untainted wheat (supply, seeds, processes, etc.) which should be protected, and whose guardians should be protected from exploitation. If such is the case, policies regarding protection and compensation strategies should be developed.

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Exploring the Ingredients of Lucrative Corporate Endorsement Investments on Female Golfers in the Korean Ladies Professional Golf Association

Janet S. Fink, Isenberg School of Management, University of Massachusetts Amherst, Amherst, Massachusetts, USA
Soyoung Joo, Marketing Department, School of Business, Siena College, Loudonville, New York, USA

Background

The core goal of this research is to explore the unique situation where female athletes draw more investments and media attention in the context of corporate sport endorsements in the Korean Ladies Professional Golf Association (KLPGA). It is well documented that women are discriminated in various workplaces around the globe (Prothero and McDonagh 2017; Seguino 1997, 2000). Even the Macromarketing Society has been critiqued in recent years for gender inequality in its editorial board (Prothero and McDonagh 2017).

Unfortunately, the realm of sport is no different in this regard as evidenced by the level of corporate sponsorship between men’s and women’s sport. It was estimated that women’s sport sponsorships accounted for only 0.4% of all sports sponsorships between 2011 and 2013 (Kidd 2018). Sport sponsorship is the investment by corporations into a sport entity as part of the corporation’s marketing communication strategy. Landing these lucrative deals are important for sport leagues’ viability and growth (Shank and Lyberger 2015). Further, sponsorship of individual athletes by a brand, or endorsements, makes up a significant portion of an athlete’s overall earnings. For example, Tiger Woods earned $43.3M in 2017, $42M of which came from sponsorships (Hess 2018). Despite the growing purchasing power of women increased attendance for women’s sports around the globe, and the proposed benefits of sponsoring women’s sport or female athletes (e.g., reaching out to ideal target markets) (Kidd 2018; Lough and Irwin 2001; Shaw and Amis 2001), women’s sports and female athletes still receive little attention from corporate sponsors (Gibson 2011; Kidd 2018; Mott 2015). In fact, “this year, for the first time since 2010, no women made Forbes’ list of the world’s 100 highest-paid athletes” (Kidd 2018 para 1) Given that the vast amount most athletes’ earnings come from endorsements, this inequity has a significant impact on female athletes.

The inertia relative to the endorsement of female athletes can be explained by strong interwoven forces. Walker and Sartore-Baldwin (2013) argued that sexism in sport has become institutionalized. That is, sexism is an impermeable cognitive institution, a norm so entrenched it’s rarely noticed, and when it is detected, change is unlikely as most accept it as conventional, or “just the way things are” (p. 21). Some argue that corporate decision makers fail to even consider sponsoring women’s sport because of this inherent sexism (Fink 2015; Kempf 2016). Relatedly, sport is a powerful institution for the reinforcement of hegemonic masculinity; therefore, female athletes and women’s sport are continuously mediated as “naturally” less interesting, “inherently” less popular, and not athletically noteworthy (Messner 1988). Thus, there appear to be strong structural barriers in sport that influence female athletes’ experiences, particularly as it relates to corporate interest.

The KLPGA provides a noteworthy context in which to further explore this phenomenon as the athletes in the KLPGA attract far more endorsement opportunities than male golfers in the KPGA (Korean Professional Golf Association) (Hankyung.com 2014; Wee 2017). This is particularly fascinating given that gender can be viewed in different ways depending on the culture of a society, and gender inequality (e.g., the persistent gender wage gap, hiring, training, and promotion practices) has been deeply embedded in the South Korean society (Seguino 1997). Therefore, we sought a better understanding of this unique relationship between South
Korean female golfers and their corporate partners. The general questions that guided this research included: What are the attributes of the KLPGA and its golfers that are most appealing to media and corporate sponsors? Why is there more corporate and media interest in women’s golf and female golfers relative to similarly ranked male golfers? Is there evidence of institutional sexism and hegemonic masculinity and, if so, is their manifestation different from what others have observed in different sport contexts? How have these powerful forces been contested (or not) by the KLPGA and its athletes? What can we learn from this context that can help build corporate interest for women’s sport elsewhere?

Method
To answer our research questions, ten, face-to-face, semi-structured interviews with executives were conducted from South Korean organizations significantly involved with the KLPGA and its golfers including the following: executives from major corporations that sponsor female golfers, executives from South Korean media outlets, sport agents that represent KLPGA athletes, and a manager from the Korean women’s professional golf league. The interview questions were designed to elicit thoughts and opinions regarding the abovementioned research questions. The interview questions were developed in English and translated to Korean. The interviews were conducted in Korean, audio taped, and back-translated into English when transcribed. We used a thematic analysis approach to uncover themes within the data. The transcripts were independently analyzed by the researchers using an ongoing coding process and method of agreement (Miles and Huberman 1991). Potential themes were derived by being mindful of existing literature while remaining open to themes that emerge from the data as well. After the transcripts were independently coded, we discussed our findings and noted points of disagreement and agreement and continued analysis until agreement was reached. Data analysis is still ongoing.

Preliminary Findings
Our preliminary analysis of the data revealed five broad themes: (1) gendered expectations in endorsement relationships, (2) appearances and unique fashion styles, (3) uncle fan groups (samchon boodaе), (4) large pool of championship level golfers, and (5) socially responsible long-term partnerships. Please see appendix for more sample quotes of each theme.

Gendered Expectations in Endorsement Relationships
The data revealed that gender expectations come into play in the context of South Korean female golfers’ endorsements. Interview participants noted that female golfers are viewed as “friendlier” in hospitality events and more appreciative of their sponsors as expected based on the stereotypical gender relations in South Korea. Indeed, there are aspects of benevolent sexism within this theme as the women are spoken about in stereotypical roles but in a complimentary manner. Further, male corporate executives enjoy playing from the same tees during the pro-am event when they play with female golfers in contrast to when they play with male counterparts (who play from tees further back). Embedded in the notions, it is noted that the corporate executives find the female golfers visually appealing which makes playing with them more enjoyable. This theme is reflected in the following quotes.

“Female golfers are definitely better in dealing with pro-am events unlike male golfers. Female golfers are more open to the appreciation of sponsors. This is because they know that a lot of money is put into that kind of stuff. Thus, I would say these three factors make female golfers valuable: great at events like pro-am event, unique visual value that only female has, and appreciation to sponsors that includes willingness to do better for sponsors. There’s not much appreciation of sponsors from male golfers.” (Sport Media)
“Female golfers also have higher marketability because they are pretty and fashionable. You’d know if you see pro-am events. Koreans (men) prefer to be in women’s pro-am events.” (Sport Media 2)

“When you play with female pros, you have similar driving (distances) and those pretty girls give you pin-point lessons with a smile.” (Sport Media 2)

**Appearances and Unique Fashion Styles**

Our preliminary findings revealed that corporate sponsors consider female golfers’ appearances (i.e., how they look) during the evaluation stage of their sponsorship contract as they believe that the fans of women’s golf are more likely to be attracted by female golfers’ appearances including their unique styles (e.g., fashion, hair, etc.). In fact, these corporate sponsors tend to encourage their sponsored athletes to create distinctive appearances by wearing unique clothes during events. This theme was reflected in the following quotes. It appears that these female golfers, while supremely talented, have to also be physically attractive to attract sponsors and fans.

“There is a clear difference between women’s golf and men’s golf in Korea…For example, if you’ve been to any women’s golf championships or tours, I’m sure you saw a lot of people hunting for female golfers to take photos of their appearances. This does not happen so much in male golf though. Next time if you go to those championships or tours, try to count on how many galleries are holding their cameras. Their main purpose in attending is to possess those moments including female golfers. Thus, this happens mostly in women’s golf tours, but on the other hand in male golf tours, there are more people who are interested in golf techniques or skills and they are really trying to see those. Let’s put it this way. It’s more about human nature that we take photos if the camera lens captures the good or beautiful image. This holds true in female golf.” (Sponsor, Food)

**Uncle Fan Groups (Samchon Boodae)**

We also found the notion of “uncle” fan groups (Samchon Boodae in Korean). These are similar to any fan clubs except in this case, the extremely avid fans are older Korean men (typically 40-50 years) who support their favorite female golfers. Whereas these uncle fans suggest a benign, supportive interest in these young female golfers, it seems that there might be some sort of sexual tension or interest among some of these fans. This unique fandom toward female golfers in South Korea appears to influence the popularity of female golfers and makes a positive impact on growing corporate sponsor investments and media coverage, but it is difficult to determine if the men are interested in their skill or their appearance. This theme is reflected in the following quotes.

“Samchon Boodae (i.e., Uncle Fan Groups) has established a fan club in order to support their favorite female golfers such as Hana Jang, Hanuel Kim, Inkyung Hu, Inji Jeon, and Hyojoo Kim. They are the key female golfers in the KLPGA right now. This Samchon Boodae is constituted by a group of people age between 40-50…I think it’s only Korea where there is a fan club like Samchon Boodae…this Samchon Boodae in Korea goes everywhere in groups and they bring big signs to support female golfers when there is a tour or tournament. These avid golf fans
love to go out and support wherever their favorite golfers play golf whenever possible.” (League Official)

Large Pool of Championship Level Golfers

In addition to the gender expectations and a focus on the female athletes’ appearances, it was also noted that there is no one dominant player who tends to win all of the competitions. Female Korean players have received standardized training via national golf teams which has produced a deep pool of talent. As such, it seems that this increased female golfers’ performance and the nature of uncertainty in female golf competitions provide corporate sponsors with valuable opportunities in that various female athletes are potential winners of major tournaments. This theme is reflected in the following quotes.

“Have you heard of golf teams? In Korea, there have been a lot of teams of golf since 2011… They received good care of system in training, which national team members receive, and the result came out pretty well. If you look at golfers who received that kind of care such as HyoJoo Kim, most of them are performing very well. As the number of these players increase, there’s been an improvement in the skills of female golfers, and there’s an increase in competitions among female golfers in South Korea. There is no definite ruler in this competition now.” (League Official)

Socially Responsible Long-Term Partnerships

Our preliminary analysis of the data also revealed that corporate sponsors appear to value long-term partnerships between the brand and female golfers as these sponsors may need to wait for a long time to reap the desired benefits of their sponsorship investments. As such, multiple elements such as athletes’ motivation, work ethic, and mental strength in addition to their performance, skills, and physical appearance seemed to be vital factors for these potentially long-lasting corporate investment decisions. This theme is reflected in the following quotes.

“…if there are some golfers who possess good factors like motivation, work ethic, and mental strength, we think about sponsoring them even though they are not great for our marketing effects in reality. Rather than expecting immediate benefits, we try to cultivate the dreams of the golfers. This is called Ggoal-Ji-Gi in Korean, which is similar to Make A Wish that is a special phrase that describes our desire to help golfers making their dreams come true.” (Sponsor, Food Company)

Conclusion and Summary

As demonstrated by the above themes, some aspects of the sponsorship of KLPGA player are complex. While they enjoy celebrity status, good training producing a deep talent pool, and long-term corporate sponsorship, these are dependent on meeting gendered expectations and a focus on appearance over athletic ability. Sexism is clearly embedded in the KLPGA/corporate sponsor relationships and the players appear to “play along” in order to reap the benefits. Thus, while some of the structures found in women’s golf in Korea (e.g., national teams) help bolster the sport, the inherent sexism and gendered expectations are entwined in the sponsors’ interest in supporting them. The final presentation will provide the complete analysis and full
discussion of the established themes as well as the theoretical and practical implications of the findings, particularly relative to macromarketing.

References


## Appendix

### Summary of Preliminary Themes and Respondent Quotations

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<th>Respondent</th>
<th>Preliminary Theme</th>
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<td>Sport Media</td>
<td>Gendered Expectations in Endorsement Relationships</td>
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<td>“I think this is because female players play at the white tee (forward tee) while the male amateurs also play at the white tee. So during pro-amateur games, they play together; they play at the same tee. And so it’s obvious that they are more empathetic with each other, and also that they have a more joyful atmosphere…”</td>
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<td>“For female VIP events, VIP’s also compete against female pros and feel more comfortable in terms of performance. For Korean VIP’s they get a sense of rivalry from the male pros”.</td>
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<td>“Female golfers also have higher marketability because they are pretty and fashionable. You’d know if you see pro-am events. Koreans (men) prefer to be in women’s pro-am events.”</td>
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<td>“It’s like a fashion show on the green if you know what I mean.”</td>
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<td>“When you play with female pros, you have similar driving (distances) and those pretty girls give you pin-point lessons with a smile.”</td>
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<td>Sponsor, Management</td>
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<td>“There is a clear difference between women’s golf and men’s golf in Korea…For example, if you’ve been to any women’s golf championships or tours, I’m sure you saw a lot of people hunting for female golfers to take photos of their appearances. This does not happen so much in male golf though. Next time if you go to those championships or tours, try to count on how many galleries are holding their cameras. Their main purpose in attending is to possess those moments including female golfers. Thus, this happens mostly in women’s golf tours, but on the other hand in male golf tours, there are more people who are interested in golf techniques or skills and they are really trying to see those. Let’s put it this way. It’s more about human nature that we take photos if the camera lens captures the good or beautiful image. This holds true in female golf.”</td>
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<td>“Usually, the image of the golfer is evaluated by the appearance including fashion as well as style, like the color of hair, so how they look. For example, we ask questions like: whether this golfer had dyed her hair or not, and if her hair looks a bit like a hippie style and so on . . . we even ask if she had any experience in plastic surgery.”</td>
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|                                 |                                               | “As professionals, this is also something that is expected from them, but one time, during the earlier period of our contract, we did actually provide
| Sponsor, Finance | clothes to a new player because we thought her fashion wasn’t sophisticated enough.” |
| Sponsor, Clothing | “Samchon Boodae (i.e., Uncle Fan Groups) has established a fan club in order to support their favorite female golfers such as Hana Jang, Hanuel Kim, Inkyung Hu, Inji Jeon, and Hyojoo Kim. They are the key female golfers in the KLPGA right now. This Samchon Boodae is constituted by a group of people age between 40-50… I think it’s only Korea where there is a fan club like Samchon Boodae… this Samchon Boodae in Korea goes everywhere in groups and they bring big signs to support female golfers when there is a tour or tournament. These avid golf fans love to go out and support wherever their favorite golfers play golf whenever possible. The number of these groups of people has increased as time goes by.” |
| League Official | Uncle Fan Groups (Samchon Boodae) “Have you heard of golf teams? In Korea, there have been a lot of teams of golf since 2011… They received good care of system in training, which national team members receive, and the result came out pretty well. If you look at golfers who received that kind of care such as HyoJoo Kim, most of them are performing very well. As the number of these players increase, there’s been an improvement in the skills of female golfers, and there’s an increase in competitions among female golfers in South Korea. There is no definite ruler in this competition now.” “Yes, there’s been an increase in skills and abilities of female golfers in South Korea. Because there is no definite ruler in the competition, there’s more chance for them to stay competitive. Fans would also become more interested since there is no definite ruler such as Tiger Woods who used to win every competition and fans could predict the result easily. In this sense, fans of female golfers in South Korea would have no idea who would win the competition, and could carry expectations of their favorite players to win.” |
| League Official | Large Pool of Championship Level Golfers “...if there are some golfers who possess good factors like motivation, work ethic, and mental strength, we think about sponsoring them even though they are not great for our marketing effects in reality. Rather than expecting immediate benefits, we try to cultivate the dreams of the golfers. This is called Ggroom-Ji-Gi in Korean, which is similar to Make A Wish that is a special phrase that describes our desire to help golfers making their dreams come true.” “We started to sponsor Hyun Joo Jung since she was an amateur golfer, and on that first year as the amateur golfer, she won one of the Korea golf major championships. However after that first win, she did not have a single win in three years. Despite the fact that she did not produce considerable effect, we continued to sponsor her with the extended sponsorship contract by looking at her difficult situations around her at that time. Then, a year has passed again. Guess what happened. She just won the golf tour championship in Japan last week. This gave her as well as us a sparkle going through our brains. I got so excited that through Facebook, I sent her a congratulating message. This case shows how our faith toward Hyun Joo Jung made it successful. It also reminded us of the importance to keep sponsoring the golfer by supporting their dreams come true, not just based on their short term performances. This is a behind story, but Hyun Joo Jung replied to my message which tells me how she was so thankful to our company… The future of sponsorship contract should be like this. Walking together to reach dreams and success.” |
From an anthropologist perspective, food consumption is embedded in cultural settings, and the eating ritual is an important form of social communication (Sahlins 1976). For instance, sharing food from the same pot in China demonstrates that food can be used as a leveling device to blur social class boundaries (Watson 1997). According to Bourdieu (1984), the attitudes towards food, different ways of eating, and choice of food express and define the structure of social relations.

Restaurants serve as a public space for socialization, a place to exhibit manners and customs (Finkelstien 1989). As such, restaurants can be regarded as part of a system of social codes that provide valuable resources to explore the social meanings of food consumption (Gusfeild 1997). Finkelstein (1989) classifies restaurants into three categories: 1) formal restaurants where dining has been elevated to an event of extraordinary stature; 2) amusement restaurants which add entertainment to dining; and 3) convenience restaurants such as cafes and fast food outlets.

Fast food consumption has been examined in various cultures. In the U.S., fast food outlets are regarded as “fuel stations” for hunger. Yet, in China, McDonald’s in Beijing has been shown by Yan (2013) to deliver the cultural code of modernity and equality. Yet, every culture has its indigenous food (Watson 1997). Traditional Chinese cuisine generally contains two major components: a carbohydrate source or starch such as rice, noodles, or steamed bun, and accompanying dishes of vegetables, fish, chicken, pork etc. Despite the global cultural influence, local cuisine still exists (Henderson 2014). While marketers have paid close attention to food consumption, little has been done to document how economic transformation impacts local cuisine, food consumption, and its attendant cultural meaning. As such, there is little research on indigenous food consumption in urban China. Therefore, the primary purpose of this research is to examine how emerging local cuisines aid in the establishment and display of cultural identities. To do so, we take an anthropological approach to analyzing emerging consumption patterns in urban China, with a focus on the meanings of local cuisine, the process of cultural change, and the formation of identities through restaurant patronage.

Food Consumption and The New Consumer in China

Scholars have broadened the studies of food to encompass the role of food as an indicator of social relations a symbol of caste, class and social hierarchy (Goody 1982), and a metaphor of self-construction with regard to ethnicity and identity (Tobin 1992). Most importantly, food is viewed as a dynamic mechanism in the way people perceive themselves and others.

Changing taste, diets, eating habits, cooking methods, and public eating spaces are associated with socio-economic development (Leong-Salobir 2011). They are also part of the globalization of the international culture of consumerism that affects food and cuisine. Early anthropological work on Chinese food has highlighted issues relating to the origin of food items, classification of food, and taboos related to food, body, and health (e.g., Anderson 1988). Recent studies show that the presentation of expensive and exotic food to guests usually signals respect. Serving an everyday family dinner marks close friendship. Eating a carryout lunch with colleagues signifies a normal work relationship (Ma 2015). In addition, foods can be used...
by people to express social status. For instance, eating shark’s fin, bear’s paw, and lobster symbolizes upper-class living in Chinese society (Ma 2015).

Since 2003, the Chinese government has initiated campaigns to alleviate poverty. For instance, the communist party has made efforts to help rural migrant to collect overdue wages. The result has been an emerging and evolving social class in China, alternatively called the “new consumers,” (Jin and Chen 2018), the “digital generations,” (Myer, Michael, and Nettlesheim 2008),” bobos” (Wang 2005), “luxury consumers” (Bu et al. 2017) or “modern consumers (Zipser, Chen, and Gong 2016).” This group of consumers is known for possessing greater spending power, having digital sophistication, and engaging in aspirational trade-ups. Yet, simultaneously, the “new consumers” maintain a pragmatic emphasis on value (Jin and Chen 2018). As such, while the “new consumers” are willing to spend their money on premium brands, they are also increasingly selective of how they spend the money. While the increase in consumer spending in China has slowed in recent years, spending on travel and entertainment continues to increase, a trend that includes an expanding restaurant market (Liu 2018; Zipser, Chen, and Gong 2016). Therefore, this research explores this cultural phenomena by using an anthropological approach to examine how an emerging stratum of “new consumers” navigates cultural identity in the context of food consumption.

**Method and Preliminary Findings**

We take an ethnographic approach to investigate how these new consumers engage in food-related activities to form their cultural identity in China. The data collection activities include photography (Gaytán, 2008), participant observation (Penaloza, 2000; Wallendorf and Arnould, 1991) and semi-structured depth interviews (McCracken, 1988). The cultural insights gathered during the incorporation of each of observational activities aided researchers in developing familiarity with the cultural milieu, as well as developing probing questions during the interview process. The restaurants were chosen based upon the online popularity ranking. Based on this criterion, the top twenty restaurants (according to DaZhangDianPing [similar to Yelp.com]) in Shanghai were chosen for the study.

According to Spiggle (1994), qualitative data analysis includes the “categorization, abstraction, comparison, dimensionalization, integration, iteration, and refutation” of data (493). Through these operations, the authors organized data, extracted meanings, arrived at conclusions and confirmed conceptual schemes and theories that describe the data. In other words, the researchers sorted, reduced, manipulated and reconstituted the data in searching for patterns and co-occurring phenomenon. Following the stages of transcription, open coding was carried out. Subsequently, the focus of the analysis was shifted to axial and selective coding to delineate “a core category around which the other categories and constructs revolve that relates them to one another” (Spiggle, 1994, p. 495).

The findings can be organized into three major themes: obsession with popularity, the negotiation of uniqueness and togetherness, and the transformation of cultural identity. For instance, some informants stated that they were willing to wait a lengthy time to buy a milk tea at a popular restaurant in Shanghai. Xi said, “I had the milk tea back in February. It was really good. But I waited for almost one hour for this cup of tea. Well, worth it though.” Qi also agreed, “Xi Cha is popular here. I tried to find a holiday to get there and still had to wait for 45 minutes. Well, I did go back to the mall to wander around for a while, then went to back to get the tea.” Another respondent expressed, “I was informed that I was number 100. OK, I will wait, as my son said he is willing to wait for one hour at least.” “My friends want to eat at this place. Thankfully, it is Monday, and we do not have to wait for hours.” (Yun)
In addition, many expressed that these popular restaurants offer unique values. Zhang stated, “the flavor is really different than other places. That’s why so many people like it and the wait is so long. When I think about tea, this is the first place to come to my mind.” Others also stated, “The food is so different and good. Look at the garnishes on the plate. This is just curry, but so good. No wonder so many people make a reservation a month ahead of time.” (Lin) “My best experience from this place is the food that is decorated like a bunny. So cute.” (Qing)

In the course of the investigation, we also uncovered the pursuit of uniqueness and the desire of maintaining collectivism that represent a form of cultural identity among the emerging middle class in China. Many expressed that foods in these restaurants are different than the traditional cuisine, yet the price is reasonable. Contrary to previous research that indicates that Chinese tend to show hospitality via expensive food, this research finds that the emerging class favors a unique atmosphere that offers values for family and friends to get together. For example, Rong stated, “The price is reasonable. I tend to bring my friends and my son here. We all love it. Not just the food, but it is a nice place to have a conversation and get together.” “This is who we are. We are going to eat shark fins all the time. This place is new and better. It something you cannot cook at home either. I love it.”

Conclusion

As the preliminary findings indicate, food consumption activities serve as a means for an emerging class of consumers in China to explore and exhibit their cultural identity. Specifically, results from interview suggest that consumers patronize top restaurants to establish a link with their popularity. In other words, consumers’ associations with trendy restaurants confers trendiness on the consumer. At the same time, to maintain popularity, restaurants must offer a unique atmosphere and menu, as well as an inviting place to socialize with friends and family, to convince these discriminating consumers to invest time and money in the patronization of restaurants.

Further research is needed to examine the intersection of the “new consumer,” restaurant popularity, and cultural identity in China. How is social distinction practiced through the consumption of restaurants (Bourdieu 1984)? How do consumers reconcile spirituality with materialism, eliteness with egalitarianism, and differentiation with conformity (Wang 2005)? How will a slowing economy affect the relationship between consumers’ quest for identity and trendy restaurants? Investigating these questions will lead to greater understanding of how food consumption activities aid the formation of cultural identity.

References


While “we can think of marketing as nothing more than an immensely complicated bridge whose work is done when traffic moves, without regarding to what kind of traffic it is,” (Cox 1969, p. 30), many, including Cox, have argued that marketing academics, professionals, and students ought to consider the outcomes of our (in)actions in society (Lavidge and Holloway 1969, p.v.). In practice, however, this approach has not been thoroughly integrated into marketing education.

Certainly, what is often missing is a systems understanding of marketing. This systems approach include the roles of the producers, the distributors, the firm itself, the customer, and the ultimate end consumer, as well as the interactions between these entities. This oversight is striking given that the foundations of marketing argued for a systems approach, including the specific environment the firm was in, as well as the other interactions of a firm beyond that of just the customer-firm dyad (Alderson and Cox 1948; Alderson 1957). However, since marketing’s inception as a discipline, especially during and after the 1960’s, the focus of marketing shifted heavily to the micro (Shapiro 2006), wherein marketing has been construed as short-term and transaction focused, with the end goal being to create products that would be purchased by customers (Grönroos 1997). In this way, customers were construed as being acted upon and even ‘captured’ (Vargo and Lusch 2004), rather than an interactive part of a system. This division and lack of an appreciation for the ‘macro’ can be seen in the reigning approaches to marketing education. For example, two leading textbooks, aimed at the novice and intermediate marketing student, provide only cursory attention to marketing and society issues.

If marketing is to be the catalyst for “the development of responsible economic leaders and informed economic citizens” (Drucker 1958, p. 263), then there needs to be a wider approach to the teaching of marketing. To support this, we propose a course focus on marketing and society, taking a macromarketing approach. Our proposed class, which will draw on the work related to marketing systems by Layton (2009; 2011; 2015a; 2015b) and others in (macro)marketing field.

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Negotiating And Navigating Womanhood: A Historical Perspective
Juliana French, Department of Marketing, Monash University Malaysia

Introduction
Studies relating to consumer vulnerability often discuss loss of control and agency (Baker, Gentry & Ritenburg 2016). On the other hand, consumers are not powerless and may resist by mobilizing collectively to seek greater inclusion and legitimacy in the market (Scaraboto & Fischer 2012). Ger (2013) argues that religion often symbolically unites a society and the politics of religion draws on economic, social, symbolic and cultural resources. Yurdakul and Atik (2016) propose a framework to articulate the role of religion by identifying the resistance and internalization processes as a response to poverty. This paper takes a turn from the traditional definition of consumer vulnerability and explores the intersection of race, religion, gender and socio-cultural discourses of beauty in Malaysia, from 1970 to 2017, in constructing a vulnerable group. The Constitution of Malaysia (1957) defines Malay as ‘a person who professes the Muslim religion, habitually speaks Malay and conforms to Malay customs’. I argue that by definition, having to speak a specific language, measure up to local customs and have your religion ascribed constitutes a violation of basic human rights of the individual. In a traditionally conservative country like Malaysia, Malay Muslim women negotiate political, socio-cultural and religious expectations in defining their womanhood. This is particularly challenging in a country where the financial, judicial and political powers are frequently not co-aligned. This study draws on discourses from four women’s beauty and lifestyle magazines spanning close to fifty years to draw its findings.

Contextual Background
Malaysia is a pluralistic society with three main ethnic groups, namely the Malays, Chinese and Indians. It is a secular state with Islam as its official religion according to Article 3 of the Constitution of Malaysia (1957). Malaysia therefore practices a dual judicial system with the common law judicial system and Syariah (Syaria) or Islamic courts for the Malays. The religious landscape of Malaysia sees the Chinese and Indians practising different religions such as Buddhism, Taoism, Christianity, Hinduism and Islam. However, Malays are classified Muslim in accordance with Article 160 of the Constitution of Malaysia (1957). The terms Islam, Islamic and Muslim as used in this paper are exclusive to the context of Malaysia. Malays make up 67% of the population and have always been the dominant group numerically but not economically or socially (Department of Statistics Malaysia 2013). In most nations, the dominant group is usually the one that holds economic and political power. Subsequently, the concept of affirmative action is designed to assist minority groups, which have been discriminated against and disadvantaged socially, economically and politically. Malaysia provides a unique context because in 1971 the government launched the New Economic Policy (NEP) that saw preferential policies in favour of the majority. Thus, the group that receives the benefits from the affirmative action policy also enjoys the political power to legislate it. Malaysia offers a unique context and fertile ground for inquiry in developing new understanding about market discourses, consumption and identity.

Methods
Local beauty and lifestyle magazines in circulation for the last five decades from 1970 to 2017 were identified. They were restricted to lifestyle, fashion and beauty magazines published monthly with similar readership. Four magazines that had available issues spanning over at least 4 decades were shortlisted to allow for continuity. The choice of magazines were based on availability and cost which is common when using historical data. Three magazines are in
the Malay language and one is in English. Magazines were first closely examined to allow familiarization with available local beauty discourses. This took considerable time and the decision to use cover pages, editorials and letters as data for analyses was made. Cover pages are designed to promote the magazine and entice readers, acting very much like an advertisement. Editorials, on the other hand, provide an overview of each issue. Cover pages and editorials were used because of the different objectives of these two vehicles. Letters, on the other hand, represent real issues that women struggle with and allowed the researcher a glimpse of the readers’ world. Each decade consisted of 10 to 15 magazines and 60 magazines in total were translated (where necessary) and interpreted. Textual and visual analysis allowed for careful study of power relations and social practices (Boreus & Bergstrom 2017). The author followed guidelines offered by Miles and Huberman (1994). The following represent early preliminary findings.

Findings
The findings reveal some issues that have remained consistent over time while others are specific to the position of the Malay Muslim woman. Most women in general can identify with the cultural expectations placed upon them by their families and society yet these often become identity issues that have to be delicately negotiated.

Balancing womanhood
The first theme that emerged was the overall definition and experience of womanhood for local women. Womanhood is often defined based on one’s marital status, it is better to be married than single and a married woman with children receives the highest status. Thus, definitions of womanhood are linked to one’s ability to secure a husband and bear children. In the 1970s discourses surrounding the stigma of single women or barren married women were prevalent. In the 1980s, women struggled with balancing their roles as wives and women in the workplace as they negotiate differences within and outside the home. Most discourses revealed tensions of women having to work and doing all the household chores at home with little or no help from their spouses. In the 1990s, women struggled in their roles as managers at work particularly when having to oversee men who would undermine female superiors. It is evident that these cultural expectations, meanings and definitions imposed on women are issues that women over the years delicately negotiate. After the turn of millennium, discourses celebrate successful women and empower women. However subtle insinuations of womanhood and expectations placed on women continue to endure the test of time.

Figure 1 – Evolution of issues of womanhood in Malaysia

Navigating the minefield
The second theme that emerged from the data addresses the issue of marriage, conversion and polygamy. These issues affect both the Malays and non-Muslims in Malaysia and are generally sensitive in nature because Malaysia practices a dual judiciary system. Letters asking for advice on polygamy and conversion is common and this seems to be a common problem. Women as a result, are often caught in a predicament. There were letters of single non-Muslim women who had to make a decision whether to convert and marry a Malay man against their family wishes. Other Malay Muslim women struggled with the issue of polygamy in accepting
proposals to be the second wife. Women are often vulnerable because of the lack of awareness of their constitutional rights. Article 11(1) of the Federal Constitution provides that “Every person has the right to profess and practice his religion…” However, attempts to rely on this Article for the right to enter or exit Islam is brushed aside by the common law courts (Majid, Sinnathamby, French & Bakar 2015). Surprisingly, these issues were not as prevalent in the 1970s as they are today but remain identity issues that woman in Malaysia continue to negotiate.

**From pursuing beauty to displaying spiritual beauty**

The final theme signifying very apparent changes in the beauty discourses over the last 48 years is the rise of spiritual beauty. In the late 1970s when veiling first appeared in Malaysia, there was an outcry that it was not part of the traditional Malay culture with some suggesting that it was mimicry of Christian nuns. Today, 40 years later, we see a drastic shift in beauty discourses where women who wear the hijab (veil) are applauded and those who do not conform to social expectations are frowned upon. Spiritual beauty in the current magazines suggest that an outer display of modest and fashionable dressing reflects an inner state of pious disposition. This is evident in cover page models as shown below. In the 1970s, most of the cover page models wore traditional costumes and sleeveless or knee length attire was acceptable. There was no restrictions or discriminations based on one’s outward attire. In the 1980s and 1990s, models had their hair veiled very loosely and less skin was exposed. After the turn of the century, a very evident Malay-Muslim consumer culture appeared. Today most magazines promote stylish and modest fashion as part of being Malay Muslim. This is drawn from Hadith Shahih Muslim 911 which states ‘Allah is beautiful and he loves beauty.’ This is generally referred to within the context of internal beauty but in Malaysia it is used to accentuate external beauty. Discourses of beauty have changed over time for the Malay Muslim woman introducing different tensions in external physical appearance that have to be negotiated.

*Figure 2 – Evolution of fashion in Malaysia*

**Discussion**

The findings reveal some discourses that tirelessly remain for women such as having to juggle many roles and feeling trapped playing a central role in family life (Stevens, Maclaran & Brown 2003). However, in many instances women have progressed and managed to navigate around these challenges. There is a stronger movement towards the empowerment of women today compared to the 1970s. Women have progressed economically as a result of education and have excelled in numerous fields.

Other discourses however, reveal substantial change in the nature of women’s rights and the expectations placed upon them because of political ideology often masked as religious ideology. Mohamad (2014) calls the twenty-first century the hegemonic Islamisation period where the family law statutes of the 1980s were replaced with a modern male-centric family Syaria in Malaysia. She asserts that the conditions for polygamy have become more lenient and granted to men who do not have the necessary financial means. The new family Syaria suggests that ‘masculinity has become a quality in which rights are conferred rather than earned’ (Mohamad 2014, p. 185). She discusses how, with the new enactment, male privileges and entitlements are sanctioned as lawful in polygamous marriages, the husband’s right to
pronounce divorce (talaq) is deemed undisputable, property division is more favourable to the male and the husband has the right to discipline a wife through beating. These findings suggest that while the Malay Muslim woman has progressed financially in many ways in the last fifty years, in other instances her rights as a woman has suppressed. The co-mingling of religious ideology and complications because of a dual judiciary system has brought about issues of the rights of women and freedom of religion. In terms of physical appearance, there seems to be a rise in modern Muslim fashion over the last twenty years. This is possibly a local response towards a global growing Islamism rhetoric and will need to be explored further.

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Location Based Services is tracking YOU: a Netnographic perspective on challenges and opportunities from UK consumers

Dr. Shelton R Giwa, Lecturer in Marketing, University of Greenwich
Dr. Suha Omar, Senior Lecturer in Marketing, De Montfort University
Dr. Anne Broderick, Reader in Marketing, Liverpool John Moores University

Background
Technology is dramatically changing the Macromarketing field redefining market structures (how, where, when services are provided and consumed, see Harwood et al. 2018). Advances in technology include but are not limited to user interfaces (e.g. superfast internet credit to widespread Wi-Fi availability), big data and Internet of Things (IoT, see Want et al. 2018). The growth in internet use and related infrastructure, for instance has great influence on customer shopping processes and behaviour (e.g. Thaichon, 2017) allowing easy access to services ‘on the go’. Such growth coincides with growth of ubiquitous technology (e.g. smart phones, smart watches) that permeate daily lives of consumers: providing relatively easy ways to gather and receive relevant marketing information (Dolbec and Fische, 2015). In particular, mobile phone traces (e.g. smartphones) have exploded, and Location Based Services (LBS) are in vogue thereby generating a lot of hype about new ways of conveniently reaching consumers. LBS is one of the IoT megatrends requiring tracking of consumers where fine grained user information is gathered when either requesting or receiving tailored location services. Other megatrend examples include Cyborgs and Artificial Intelligence applications (see Harwood and Garry, 2017- techno-service systems and Harwood et al. 2018; see Sweezey, 2017 for Airbnb and Tesla examples) and location aware advertising which falls under the ambit of LBS. Of the megatrends, LBS is poised to impact markets as ubiquitous technologies rapidly become embedded into consumer lifestyles/daily lives. This comes at a time when the UK is a leader in mobile adoption and mobile phone advertising with smartphone penetration rates pegged at 83% as of February 2018 (Statista, 2018). Furthermore, the UK is forth (67%) in terms of bargain seekers . We see LBS as one of the megatrends with increasing importance of targeted marketing where relevant offers (e.g. bargains such as money off coupons) are contextualised. Businesswire (2018) forecast the LBS market to be worth £104.3 billion by 2023. Nonetheless, fully harnessing the potential of LBS has its challenges. For example, macromarketing issues centred on ethics (e.g. privacy and trust). Roessler and Mokrosinska (2015) cite potential ethical quandaries (e.g. manipulation of user details) despite the unparalleled precision of ubiquitous technology. Similarly, Jiang (2015) as well as Harwood and Gary (2017) highlight concerns (e.g. legal, privacy and trust) where big data is collected. Thus, capabilities of LBS (e.g. Wi-Fi) often highlight threats posed by technology (e.g. privacy concerns). Samuleson (2008) breaks down privacy into four types: location privacy, electronic communication privacy, individual information privacy and public place privacy. More recently, Vargo and Lusch (2017) highlighted to consider public policy: trust and privacy issues issues.). This calls for deeper understanding of challenges and opportunities for various stakeholders engaging with location services (e.g. consumers and marketers). Accordingly, our research seeks deeper insights into factors that mobilise or demobilise consumer response to LBS in the clothing and fast food sectors. As such key objectives of this study are to, a) explore consumer experiences with location-based services, b) examine how respondent perceptions (value and risk) influence response to LBS and c) uncover how context may influence individual consumer response patterns.
Understanding the complex interface of LBS

Consumers are becoming increasingly sophisticated and demanding (Gronroos, 2010) and increasingly seek contextualised services. LBS is seen as a solution to deliver value when one searches for nearby points of interest (POIs) such as shops, restaurants, traffic updates, location-based advertising etc. For example, LBA where consumers use apps (e.g. retail apps) to request as well as respond to advertisements. Sector-specific apps and social platforms such as Foursquare now use geofencing to alert customers to promotions near their locality (see, Orange, 2011). LBA resonates with mobile lifestyles- consumers want to be socially connected; they use the device in versatile ways. A mobile audience insight report by Forrester (2013) indicated that 34% of customers had used mobile devices to research products in-store. Within the LBS ecosystem, benefits (value) are based on time and convenience meaning free access in exchange for contextualised services. Schlegel et al. (2015) see context as another megatrend, a significant property of IoT systems (e.g. LBS) where location information gives customers and marketers alike unparalleled precision (Ngai et al. 2009). Cronin et al. (2000) and Bajs (2015) refer to perceived value and how it influences purchase intention. Seminal authors (see, Chen and Dubinsky, 2003) highlighted the dynamic nature of perceived value based on (a) context and (b) type of service or product: relevance in studying value in different contexts (e.g. various retail contexts). Thus, consumers may perceive value in contextualised LBS: relevant services or products delivered at the right time, place and situation (see, Tanakinjal et al., 2007 and IAB, 2014). Despite the affordances of LBS, like any technological development, LBS raises a new set of ethical dilemmas (e.g. untrustworthy organisations) given that location services track individuals and a profile is constructed based on requests made.

Concerns abound pertaining to how LBS is used and the broader implications to society (Ashworth and Free 2006). In addition, current privacy preserving techniques require fully trusted third parties offering limited privacy guarantees (Schlegel et al. 2015) despite a requirement for LBS users to continually update their location. Therefore, we observe how IoT requires connection of sensing devices to enable exchange of information yet privacy issues linked to the operation of IoT systems are yet to be fully explored (Chen et al 2017). Whilst some authors (see, Boukerche et al. 2008) have recommended using cryptography or digital signatures (NIST, 2008) to safeguard location information, implementation of these safeguards is impeded by limited resources (Chen et al. 2017). Further considerations are required given relatively new location data privacy regulation such as the General Data Protection Regulation (GDPR). GDPR focuses on data protection and individual privacy: addresses social, legal and ethical issues (Huang et al. 2018). There is therefore now a requirement for LBS providers to obtain consent before using location coordinates (see Article 6, GDPR), meeting privacy and human rights requirements (Article 7, GDPR). In addition, GDPR articles 187 and 189) serve to ensure that user privacy is protected whenever location information is used or collected (Chen et al. 2017). Despite perceived value of LBS (consumer side and tantalizing opportunities for data profiling [see Wang and Hqajli, 2011]), we see how challenges in LBS use may stem from the blurring of boundaries between contexts (private or personal), trust and privacy issues. Privacy of users is pivotal given the nature of LBS which requires recording and tracking of peoples’ sensitive information. Sweeney (2017) observes a growth in ad blocking with 6.5 billion devices adopting ad blocking software with estimated costs of £ 9.4 billion in advertising revenue by 2020. Nevertheless, multiple sensors (devices) avail opportunities for LBS stakeholders to learn about consumer habits, lifestyles and decision making (profiling). With future IoT predictions signaling en masse data collection (e.g. daily movements, activities and e-lifestyles) privacy trust issues are projected to increase: urgent need for LBS that preserve user privacy (Chen et al. 2018). In addition, emergent services (e.g.
LBS) potentially exploit vulnerable people who may lack awareness of capabilities of data mining and tracking systems (Busch, 2015): arouse ethical concerns. Therefore, our paper seeks to explore affordances and constraints of location-based services in retail weighing up value and risk narratives using the UTAUAT framework (Venkatesh et al. 2003) as recommended by Zhou, 2012).

Design/Methodology/Approach

Whilst most LBS studies rely on positivist measures (see Bruns and Jacob, 2014), our study sought to empirically explore consumer perceptions (value and risk) of LBS. Capturing emergent and complex services using traditional methods can be challenging (Harwood and Gary, 2017) hence our study uses a netnographic approach: capturing consumer behaviour (decision making, intention and response) in native environments where value is derived from capturing contemporary consumer culture (Kozinets, 2008 and 2015). A mono method qualitative design was adopted and 85 threads from 4 websites were sampled. Piloting of relevant sites was conducted over a period of three weeks resulting in 4 websites that contained rich threads on LBS.

Research Findings

Despite LBS being in infancy and muted lack of awareness (see Zhou, 2012) results emerged in our study pointing to rich consumer experiences with location services. For example, usefulness where location services offer access to contextualised services in transit. Second, consumers were now blocking irrelevant services: awareness a prerequisite to behavioural intention to adopt LBS. Thus, indifference in the absence of opt in and opt out options were concerns over perceived risk (e.g. data breaches, selling of data and the covert nature of services, spam: trust transfer process – see Yang and Chen, 2015). Third, use of incentives (discounts and coupons) has a higher propensity to trigger consumer response.

Conclusion and Implications

As location-based services continue to increase in sophistication, there is need for more theoretical models that offer good explanatory potential (Pardamean, and Susanto, 2012) to understand consumer response further. Our research develops further research by seminal authors (e.g. Zhou, 2011, Yu et al. 2013) providing richer insights into specific privacy concerns when using location services.

Keywords: Location services, location privacy, context
The Social Construction of Mythologies
Sarah C. Grace, University of Arkansas, United States

Keywords: The Social Construction of Mythologies, cultural myths, consumer subjectivity, semiology, phenomenology

Introduction

In the social sciences there exists an age-old duality of structure versus agency; and as marketing’s role in society has been substantiated, a duality between markets and consumers. In order to make a conceptual contribution in the domain of markets, marketing systems, and culture, we need a theoretical orientation that destabilizes this duality between structure and agency. In other words, a framework that analyzes a process of co-creation, in which cultural structures influence consumers and their actions in the marketplace and consumers influence the cultural structures that situate marketing systems.

The macromarketing research stream is driven by a theoretical orientation that focuses on markets as the unit of analysis. Emphasis is given to the marketing system: “a network of individuals, groups, and/or entities linked directly or indirectly through sequential or shared participation in economic exchange that creates, assembles, transforms, and makes available assortments of products, both tangible and intangible, provided in response to customer demand” (Layton 2007, p. 230). Macromarketing inquiry contextualizes marketing systems in society, studying not only marketing systems themselves, but prioritizing the reciprocal relationship between marketing systems and society (Hunt 1981).

Recently, the conceptualization of marketing systems as symbolic entities has been explicitly adopted in macromarketing literature (Kadirov and Varey 2011). Macromarketers acknowledge that both consumers and marketers co-create meanings in the marketplace (Layton and Grossbart 2006), that act back upon individuals and individual firms. Therefore, understanding how these meanings are produced in such a dialectical nature is important for achieving macromarketers’ shared desires to understand how marketing can take the form of constructive engagement in society, theorizing meaningful solutions for complex problems (Shultz 2007).

Marketing systems are situated within unique cultural contexts, thus cultural understanding is a crucial component of macromarketing analysis. Recent calls within macromarketing have requested that scholars create new theoretical frameworks and strategies for analyzing culturally-embedded market-level phenomena. Of particular interest is identifying a framework that can study the symbolic dimension of markets in addition to the tension that can arise between individual actors and the ideologies held by the wider cultural framework (Becker and Haase 2018).

This extended abstract introduces a new theoretical framework that enables such aims: The Social Construction of Mythologies. The Social Construction of Mythologies facilitates understanding between meanings held by society in the form of cultural myths and meanings formed during an individual’s experience of cultural myth. By combining multiple levels of analysis, The Social Construction of Mythologies framework facilitates a dialectical relationship between individual and society, consumer and marketplace environment, to demonstrate how cultural meanings are maintained and transformed in society’s symbolic universe; and further, how cultural meanings affect marketplace interactions.
Concepts

The Social Construction of Mythologies must first begin with an understanding of the concept of ‘cultural myth’. Developed by Roland Barthes in Mythologies (1956), a cultural myth is a symbolic meaning that has been repeatedly embedded into society as a natural, mutually agreed-upon truth. The foundations of semiology, or the science of signs, further elucidates the concept of cultural myth as used in this paper.

Barthes draws upon the semiology of Ferdinand de Saussure to fully develop his notion of cultural myth, his “science of connotations”. Saussure believed that a signifier (an object, or carrier of meaning) acted upon a signified (a cognitive concept, or meaning itself) to form a sign. A direct meaning that an object carries is a ‘denotation’ whereas a second-order meaning is a ‘connotation’ (Barthes 1977). For example, the denotation of the word ‘time’ may be a specific moment of time on a clock, whereas the connotation of ‘time’ may be ‘money’, or the principle of opportunity cost as widely introduced into Western culture by Benjamin Franklin.

Such connotative structures are complex products of human experience and cultural context that provide structure for society and its participants. Through symbolic repetition and cultural preservation, cultural myths become pervasive ideologies that work to stabilize shared beliefs in a manner that can be passed down from generation to generation. As market structures have become substantiated in society, the mythical concept has been translated into marketplace phenomena, where shared ideologies permeate aspects of consumer culture and ultimately drive marketplace decision making and consumer behavior (Belk and Costa 1998; Levy 1981; Thompson 2004).

When approaching wicked, complex problems, identifying the cultural myths that lay the backdrop for such phenomena may be helpful in analyzing the potential efficacy of social and market-driven solutions. Society is built upon a multitude of cultural myths and understanding the nuances of each (e.g. how they are created and how they are maintained) allows for a more thorough understanding of how individuals are affected by the various beliefs held within a specific cultural context. Cultural myths may be analyzed using methods of semiotic interrogation.

Barthes’ concept of cultural myth is helpful for understanding social structure, but his theory does not imagine the possibility of an agentic individual expressing existential consciousness, reflection, or subjectivity. From the perspective of cultural myth, individuals are hopelessly stuck in a pattern of repeating significations. Therefore, pairing the semiological concept of cultural myth with the phenomenological experiences of individuals as demonstrated in Berger and Luckmann’s The Social Construction of Reality (1967) provides a theoretical basis for understanding how individuals may experience and respond to society’s host of cultural myths.

Stemming from the tradition of continental philosophy, phenomenology asserts that the world is richly meaningful and that a phenomenological perspective is the best way to significantly access a sense of individuals and a world comprised of individuals (Critchley 2001). A phenomenological perspective is reflexive and seeks to understand the meaning of an individual’s lived experience as an individual experiences it. In this, phenomenology emphasizes the experiences of everyday persons in the analysis of society.

The phenomenological concept of intentionality is most helpful for understanding how individuals relate to their cultural context. As described by Pollio et al., “Intentionality … is a basic structure of human existence that captures the fact that human beings are fundamentally related to the contexts in which they live, or, more philosophically, that all being is understood as ‘being-in-the-world’” (1997: 7). Intentionality implies that individuals’ consciousness is directed outside of themselves, towards the world around them. Individuals continuously
interpret and respond to cultural myths in society. Phenomenology provides both a theoretical and methodological orientation for examining the interactions between individuals and society, or the co-creation of culture.

**Co-creation of Meaning in The Social Construction of Mythologies**

Phenomenology and semiology are each about meaning; how meaning is experienced, constructed, and held by both individuals and society. Through these two theoretical perspectives, The Social Construction of Mythologies facilitates an on-going relationship between the meanings formed during an individual’s lived experience and the meanings held by society in the form of cultural myths. While the areas of phenomenology and semiology have each influenced marketing thought in the last several decades, these two areas are not typically combined within a single research project.

*Figure 1. The Social Construction of Mythologies framework*

The Social Construction of Mythologies framework also explores how cultural myths (often aided by market objects) embed into society/the market environment as natural. A portrayal of cultural myth can be construed through semiotic analysis, helping the researcher understand the naturalized social order and the ‘context of context’ (Askegaard and Linnet 2011) in which a particular phenomenon occurs. Next, a representation of an individual’s lived experience is formed through existential-phenomenological methods, helping the researcher understand how individuals internalize, experience, respond to, and ultimately create new meanings in the symbolic universe. Through their experience of the myth, individuals respond by either preserving the myth, and thus maintaining the social construction of the mythologies, or by challenging it, and thus opening a door for symbolic transformation. Interestingly, market objects can help facilitate these processes as well.

**Conclusion**

The theoretical concepts underlying The Social Construction of Mythologies focus on the relationship between consumers and the broader marketing environment, explaining how the market is ultimately maintained and transformed through dialectic tensions between the two. Social structure exists in the form of cultural myths, but individuals have agentic qualities that consciously accept or challenge the myths that promote business-as-usual behavior. Semiology seeks to maintain, phenomenology may transform. The Social Construction of Mythologies provides a beneficial framework for studying a wide variety of issues important to macromarketers, such as inspiring sustainable lifestyles in the face of climate change, ensuring
protection and quality of life for vulnerable consumers, or promoting equality in the marketplace.

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We now interrupt this dominant social paradigm: Promoting sustainable lifestyles through market-enabled global mélange

Sarah C. Grace, University of Arkansas, United States

Introduction
Sustainability is a global problem that requires exchange of ideas and strategies for implementing solutions. The UN Environment Programme (UNEP) has been an institutional leader in unifying efforts to such end. As a result of the Marrakech Process, a global multi-stakeholder task force aimed at supporting the implementation of sustainable consumption and production, the adoption of “sustainable lifestyles” has been identified as a necessary foundation for achieving sustainable consumption patterns worldwide (UNEP 2019, Akenji and Chen 2016). However, inspiring sustainable lifestyles among consumers proves to be a complex problem within the existing structures of developed consumer societies and marketing systems.

Continuing the spirit of cross-cultural collaboration, this abstract suggests that marketing systems can evolve to promote sustainable lifestyles through market-enabled global mélange: introducing cultural customs and traditions from around the world that promote sustainable patterns of consumption in the marketplace. This abstract first explicates the relationship between dominant social paradigms and current consumer trend patterns, which together work to maintain social norms of unsustainable consumption patterns and substantiate an obstacle to achieving widespread adoption of sustainable lifestyles. Next, I explore the opportunity presented in market-enabled global mélange, or the phenomenon of global mixing and diffusion of cultural ideas. Three case studies of cultural ideas that have been marketed across borders will be explored: KonMari, the Japanese-inspired art of tidying up; Hygge, the Danish quest for meaningful coziness; and Lagom, the Swedish concept for maintaining balance. A Sociology of Knowledge Approach to Discourse (SKAD) analysis will reveal how these cultural ideas are borrowed, mixed, and diffused throughout the marketing system as consumer lifestyle trends, promoting messages of sustainability as hedonic consumer benefits. Lastly, potential implications of this ongoing research will be discussed.

The Dominant Social Paradigm and Consumer Trends
As the call for papers for this conference track suggests, “consumption and consumer lifestyles evolve over time under the influence of cultural norms, institutions, and marketing actions” (Helm and Kemper 2018). Similarly, the Dominant Social Paradigm (DSP) may be understood as a set of values, beliefs, and institutions that creates a collective social lens for all of society to act in accordance to (Lunde 2018). Macromarketing has long viewed the DSP as a prohibitive opponent to the practice of sustainable consumption patterns (Kilbourne, McDonagh, and Prothero 1997; Kilbourne, Beckmann, and Thelen 2002; Kilbourne and Carlson 2008).

Further, business-as-usual marketing systems play a pervasive role in maintaining the dominant social paradigm. A capitalist market system relies upon continuous market innovations that entice consumers to purchase new goods and services. Often, these market innovations are not largely additive on a utilitarian scale, but rather introduce marginal adjustments to design or appeals to tastes; in other words, consumer trends. To deliver on the market goals of profit maximization and continuous GDP growth, consumer trend cycles have shortened in recent history with new market innovations introduced to the market at an increasingly rapid pace (Powers 2018). This in turn creates consumer habits of purchasing often and oftentimes unnecessarily. The current consumer trend cycle promotes unsustainable consumerism that
inherently prevents sustainable consumption patterns from emerging. Key issues such as planned obsolescence and product waste further create negative effects for the environment, and arguably, consumers.

Because the DSP is a structural condition, emphasizing the importance of agreed-upon social norms within a given culture, it is difficult for individual consumers to de-stabilize or act in opposition towards the prevailing DSP. When a dominant social paradigm is not in support of sustainable consumption, for example, consumers wishing to make sustainable choices can find themselves locked into unsustainable infrastructures (Sanne 2002). In this case, individual agency gives way to the momentum of society (Kaiser 2006).

The DSP provides a critically important clue to understanding the problematics of promoting sustainable lifestyles. It has been said that the way in which modern society collectively views the environmental crisis in everyday life can be a large part of the ecological problem (Spaargaren and Mol 1992). Therefore, in order for sustainable lifestyles (and sustainable consumption) to become a social norm, the DSP must be interrupted and transformed into a set of beliefs that broadly values sustainability.

Market-Enabled Global Mélange

Just as sustainability is a shared global responsibility; perhaps a solution can be inspired by such a globalized world as well. Pieterse (2015) describes contemporary global culture as a mélange: an open-ended, ongoing mixing between cultures, enabled by technologies of globalization. In this era of unprecedented globalization, mixing between cultures is further driven by commercial activity. Though early critics of marketized globalization feared cultural homogeneity, consumer research has repeatedly shown that, due to local interpretations of global meanings, market-enabled global mélange results in heterogeneity, or hybridization of cultures (Askegaard and Kjeldgaard 2007; Eckhardt and Mahi 2004; Ger and Belk 1996). Further, this hybridization of culture presents an opportunity for transformation within the receiving culture.

New ideas introduced to a culture through the marketization of cultural ideas can disrupt normal assumptions and patterns of life. In other words, global mélange can interrupt existing dominant social paradigms. New information changes the way that we think about, interpret, and experience our world (Welsh and Murray 2003). The backdrop of the dominant social paradigm becomes unhidden against the illumination of new information, at which time a society’s prevailing DSP can be questioned and transformed.

Promoting Sustainable Lifestyles

Given this understanding of the dominant social paradigm, supported by business-as-usual consumer trends and consumption patterns, and the opportunity presented in market-enabled global mélange, I propose that marketers work within the current marketing system to promote more sustainable consumption patterns. This can be achieved by employing culturally-inspired lifestyle trends to disrupt the dominant social paradigm and inspire sustainable lifestyles.

Lifestyle trends are the commercialization of a cultural or subcultural identity, focusing on activities, interests, opinions, and values connected with consumer behavior. Lifestyle trends dramatically differ from aesthetic trends (such as a design motif, popular color, or hemline length) in that they permeate society more existentially than a purely aesthetic trend might. Lifestyle trends are rooted in deep cultural tradition, but when lifted from their original cultural context and introduced to a new culture, their meanings become localized, performing a different function in the culture of reception.
Lifestyle trends can disrupt a dominant social paradigm by introducing new ideas into the marketplace. When consumers internalize new ideas, they may become reflective on their marketplace interactions, inspiring new patterns of consumer behavior. As lifestyle trends diffuse throughout society en masse, new patterns of consumer behavior act upon the existing DSP, ultimately working to transform it.

In the last few years, several culturally-informed lifestyle trends have permeated the Western marketplace. Three recent examples illustrate how lifestyle trends may be used to promote more sustainable consumption: Marie Kondo’s Japanese-inspired ‘art of tidying up’, or KonMari, the Danish concept of Hygge, and the Swedish concept of Lagom. The Japanese-inspired KonMari method encourages practitioners to assess material possessions, keeping and acquiring only those that "spark joy" in their life (Kondo 2014). The Danish practice of hygge promotes indulging in temporally-unbound, cozy experiences and meaningful relationships with others (Wiking 2017). Lagom is a Swedish philosophy of striking balance; possessing neither too much nor too little, but rather focusing on having just the right amount (IKEA 2017).

Discourse Analysis

Utilizing a Sociology of Knowledge Approach to Discourse (SKAD) (Keller 2011), ongoing analysis looks at each lifestyle trend’s ability to promote more sustainable lifestyles to mainstream marketplace constituents. The main aim of this analysis is to answer the research question: How do culturally-inspired lifestyle trends communicate the benefits of sustainable lifestyles to consumers? Preliminary findings will be available at the 2019 Macromarketing conference in Cleveland, Ohio.

Anticipated Findings and Discussion

Sustainable consumption must focus on sustainable systems—in this case, the global marketing system. We should continue to reinvent marketing to manage the environmental imperative (Kotler 2011) and this requires the reinvention of existing marketing structures, resources, and tools to promote more sustainable lifestyles worldwide. While the DSP will typically reify throughout society, substantiating its “naturalness” and preserving its position, the DSP is not a purely static reality. The DSP may be transformed. Using the marketing system to interrupt and alter the dominant social paradigm inherently changes the structural forces that maintain social norms within a society. The result of a successful campaign is that sustainable lifestyles are socially agreed-upon as new-normal patterns of consumption.

Additionally, utilizing existing market structures to promote sustainable lifestyles creatively satisfies the demands of sustainable marketing in a modern context. To cite the parameters of sustainable marketing given by Lunde 2018:

“Sustainable marketing is the strategic creation, communication, delivery, and exchange of offerings that produce value through consumption behaviors, business practices, and the marketplace, while lowering harm to the environment and ethically and equitably increasing the quality of life (QOL) and well-being of consumers and global stakeholders, presently and for future generations” (10).

Thought of in this light, marketers may move away from marketing sustainability (e.g. convincing consumers to “go green” for the environmental benefits) to practicing sustainable marketing by introducing a compelling value proposition to the marketplace. Sustainable lifestyle trends primarily appeal to the desires of the adopter, rather than explaining the potential environmental impacts of consumer actions. This strategy focuses on hedonic benefits to the consumer, rather than benefits to the environment or greater good. As Urry
(2015) suggests, “changing systems must appear to populations around the world as more desirable, fashionable and necessary components of a better and more fashionable life”.

**Conclusion**

The UN Environment Program has identified the adoption of "sustainable lifestyles" as a way for consumers to practice sustainable consumption patterns in both developed and developing nations. However, the Dominant Social Paradigm, supported by the consumer trend cycle, perpetuates unsustainable patterns of consumption in many developed Western societies. Macromarketing, with its systems-wide perspective, is well-positioned to conceptualize a solution. This extended abstract proposes the use of market-enabled global mélange to introduce new ideas (in the form of lifestyle trends) into the marketplace. In this, the Dominant Social Paradigm is challenged and urged towards transformation while also appealing to hedonic consumer desires. This creative use of marketplace resources inspires sustainable consumption patterns and meets the criteria for a new definition of “sustainable marketing”.

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Cultural Co-creation and the Changing Urban Landscape

Dr Tracy Harwood Professor of Digital Culture, Institute of Creative Technologies, De Montfort University, The Gateway, Leicester

Dr Tony Garry, Senior Lecturer in Marketing, School of Business, Otago University, Dunedin, New Zealand

Purpose

This paper presents a conceptual framework of a cultural co-creation strategy for a city that may be used to engage the ecosystem of citizens, creative and cultural organizations, and private and public realm stakeholders. Drawing on the example of a festival celebrating new technological advancements directed by one of the authors, the framework highlights how the key issues of relationship management and leadership in the public realm, technologies for performance and open data, audience engagement and feedback, and curation and accessibility interrelate.

Methodology

Uses mixed methods with a predominantly qualitative research design with findings of preliminary analyses presented. Techniques employed are observation, practice-based research, netnography and interviews with key informants.

Findings

Preliminary findings are presented on emergent themes including roles of creative technologies in cityscapes; values generated for stakeholders such as citizens, creative and cultural organizations, and private and public realm organizations; and key issues arising.

Contribution

The contribution is its holistic overview of citywide factors that need to be considered in designing a cultural strategy for the evolving urban environment.

Key words: smart cities, networked relationships, digital culture
Buying Immortality in a Changing Climate: A Terror Management Approach
Sabrina V. Helm, University of Arizona, USA
Grace J. Wofford, University of Arizona, USA

Introduction
The existential threat to humanity posed by climate change is starting to receive attention in numerous literature disciplines and presents climate change as a “wicked problem” that should be addressed by macromarketers today. Overpopulation and overconsumption, the main drivers of anthropogenic climate change (Fischer et al. 2017; York et al. 2003), are based on decision-making of individuals, underlining the importance for developing a better understanding of consumer psychology and behavior in the context of climate change.

The current study intends to explore how our cognition and perception of the threats of climate change may raise mortality salience (MS), or death anxiety derived from the awareness that one’s death is inevitable, which may in turn impact our consumptive tendencies. Rationally, one could expect that heightened MS might reduce consumption aspirations as the consumer gains knowledge of the threats of climate change and subsequently makes an effort to safeguard environmental resources, overall lowering the impact of one of the root causes of anthropogenic climate change. However, Terror Management Theory (TMT) supports the opposing effect in suggesting that MS increases consumption, thus exacerbating climate change. Hence, the psychological construct of MS and TMT merit attention from a macromarketing perspective. TMT addresses how humans cope with the constant awareness of our own mortality through the development of psychological defenses that prevent the rumination and acknowledgement of death (Greenberg et al. 1990). The psychological defense mechanisms of TMT outline consumption as a means of bolstering self-esteem through the cultural norms and rituals associated with material possession in westernized societies.

With regard to climate change, authors have pinpointed denial as one of the prominent responses humans exhibit when they or their offspring are exposed to the possibility of death (Dickinson 2009). In addition, many may not even recognize how their individual consumption contributes to the problem (Iyer and Muncy 2016; Perera and Hewenge 2013). However, even if pushed out of consciousness, threatening death thoughts still linger. For example, research on TMT has shown that unconscious MS increases intended future spending, an indicator of overconsumption (Fransen et al. 2008; Kasser and Sheldon 2000). Initial research has also begun to explore the interface between MS and pro-environmental behaviors, including green product purchase (Rahimah 2018). Building on these isolated studies, the current research links climate change to MS and subsequent consumption-related behaviors, conceptualizing (a) the potential of climate change threats to increase MS; (b) the potential of MS to spur or dampen overconsumption and “more sustainable” forms of consumption, such as green product purchase; and (c) the potential of materialistic values and pro-environmental values to serve as moderators. By examining these relationships, we provide the theoretical groundwork for subsequent empirical (experimental) studies that can test the relationships suggested in our conceptual framework.

Conceptual Background
Climate Change and Overconsumption

The Intergovernmental Panel on Climate Change (IPCC) defined climate change as changes over time in the averages and variability of surface temperature, precipitation, and wind as well as associated changes in Earth’s atmosphere, oceans and natural water supplies, snow and ice,
land surface, ecosystems, and living organisms (IPCC 2007). Global warming is the increase in temperature of world regions resulting in the estimated rise of sea levels. Some authors argued that the increase in per capita consumption levels is the root cause of climate change (e.g., Fischer et al. 2017) and rapid environmental decline (Kilbourne and Pickett 2008; Sheth et al. 2011), more so than population growth. However, overconsumption is not given sufficient consideration in this context due to cemented beliefs that consumption is the pillar of a society’s economic prosperity (Robbins and Dowty 2008). Some of the environmental challenges associated with overconsumption include natural resource depletion, deforestation, water and air pollution, and loss of soil and agricultural land, which threaten the sustenance of present and future generations (Winter 2004) and contribute to global warming.

So why on earth do we consume so much? The cultural norms and materialistic lifestyles of citizens in Western industrial societies—the “consumption role models of the world” (Ahuvia and Friedman 1998, p. 161)—seem to indicate that we believe consuming will make us feel better. Preoccupation with acquisition and possessions is enhanced by the constant material desires driven by the capitalistic nature of westernized society leading to ever increasing purchase of goods and services. Instead of consumption acting as an avenue for increased satisfaction consumption has manifested into a fact of westernized life rather than a means to an end. Similar to other socio-pathologies such as substance abuse, overconsumption generates social, economic, and psychological problems to individual consumers and their families, but overconsumption also has planetary consequences (Jackson 2005). The societal addiction to material possessions has resulted in the disregard of the necessary rare environmental resources and the negative externalities that result from the production of goods and services, all of which are indicators of overconsumption (Kilbourne et al. 1997).

The unsustainable nature of current consumption levels, the fact that climate change is driven by overconsumption, and the fact that climate change has now reached a level that threatens human existence, suggest that that a better understanding of consumer psychology is needed. We suggest that Terror Management Theory provides possible intervention strategies and insights into why consumers, faced with news of inevitable extinction, partake in counterproductive consumption.

**Terror Management Theory**

Based on the existential philosophies of Ernest Becker (1973), Terror Management Theory (TMT) explains how humans establish defense mechanisms and socio-cultural structures to avoid thinking about their inevitable death. In particular, it proposes that when mortality becomes salient, individuals use a two-pronged psychological defense mechanism, as explained in the Dual Defense Model (Pyszczynski et al. 1999). This model describes how exposure to a death prime evokes two psychological mechanisms, proximal and distal defenses. Proximal defenses refer to the cognitive process by which we remove death from focal thought when exposed to a death reminder. This is achieved through a rational thought process, which can take the form of denial, suppression, or belittling the likelihood of one’s death (Greenberg et al. 1994). However, once the topic of death is out of focal attention, mortality does not dissipate from our thoughts completely. Death thoughts can quickly become subliminal once we are distracted, and continue to impact our cognition. When this occurs, distal defenses are activated. According to TMT, we confront distal death thoughts with two defense mechanisms: First, the strengthening of our cultural worldviews and, second, the bolstering of our self-esteem (Rosenblatt et al. 1989; Greenberg et al. 1993).

Cultural worldviews can be defined as “humanly created and transmitted beliefs about the nature of reality shared by groups of individuals” (Greenberg et al. 1997, 65). Worldviews are established early in life as children look to those raising them to model what is approved of in
society. By following norms and receiving positive reinforcement, individuals gain a sense of self-worth and self-esteem by complying with these beliefs and value structures (Greenberg et al. 1997, p. 17). In response to a death threat, the value structures that make up our cultural worldview allow us to validate our faith in social structures and give a sense of literal or symbolic immortality. Literal immortality can be achieved through the belief in an afterlife, which is an essential component of the doctrine outlined by many religions, but not necessarily tied to religious beliefs (Lifshin et al. 2016). Symbolic immortality can be achieved through significant political action, personal or professional contributions that we feel will live on even after our physical departure (Greenberg et al. 1997).

Bolstering of self-esteem is the second mechanism of the distal defense system. In the context of TMT, self-esteem is defined as “the perception that one is a valuable member of the universe” (Greenberg et al. 1997, p. 66). Self-esteem is essential in diminishing death anxiety and is derived from conforming to and acting on the values and standards that make up our cultural worldview. When subliminal death anxiety is present distal defense amplifies cultural worldviews, which in turn boost our self-esteem and make us feel that our lives have significance and purpose. Therefore, self-esteem acts as a mechanism that allows cultural structures and values to serve their function of diminishing death anxiety levels (Greenberg et al. 1993). Both of these mechanisms, as well as proximal defenses, have been extensively tested, and literature provides substantial evidence that they effectively eliminate death anxiety from our thought process (Burke et al. 2010).

**TMT and Climate Change: A Conceptual Framework**

TMT and climate change can be linked when we interpret climate change as an existential threat to the human species or, more directly, to our own lives. As Bendell (2018) emphasized, the evidence is mounting that the impacts of climate change will be catastrophic to our livelihoods and the societies that we live in—in our own lifetime. Some of the most extreme extinction scenarios include a rapid collapse of societies triggered by the inevitable methane release from the seafloor, leading to multiple meltdowns of some of the world’s 400 nuclear power stations and thus affecting the sudden extinction of the human race (Macpherson 2016). Such scenarios support Dickinson’s (2009) suggestion that exposure to information on climate change triggers proximal defenses such as denial of climate change or its human causes, minimizing the problem, or projecting its impacts far into the future, which all serve to limit the danger seen for one’s own life. Given the growing exposure to climate change-related reporting on the news and social media (Boykoff 2011), it is reasonable to assume that, for many people, climate change presents itself as a threat to human life, or even their own life, although such relationship remains to be empirically tested in the context of TMT (Dickinson 2009). We therefore propose the following:

*Proposition 1: Exposure to climate change-related information triggers mortality salience and subsequent psychological defense mechanisms.*

**Consumption as Defense Mechanism**

Dickinson (2009) noted that climate change threat could trigger the response of distal defenses, and result in the culturally sanctioned means of boosting self-esteem, “which in Western society could mean counterintuitive increases in status-driven consumerism, materialism, and other behaviors that increase carbon emissions…and a tendency to bolster the existing worldview even if it is not sustainable” (Dickinson 2009, p. 5). This notion echoes Kasser and Sheldon’s (2000) prediction that increased exposure to the consequences of climate change may entice consumers to seek status through material wealth and increased consumption. As already noted in Becker’s seminal work (1973), the behaviors people exhibit in response to
existential threat are not always effective in reducing the risk of death. In fact, those behaviors may sometimes increase such risk if they also serve to strengthen the individual’s self-esteem and cultural worldview (Dickinson 2009).

Past research has indeed established a link between MS and indicators of overconsumption. MS for example increased consumer preference for luxury items and familiar brand names (Van Bommel et al. 2015) and preference for domestic products (Nelson et al. 1997). These effects were particularly pronounced for products with strong links to consumers’ self-esteem, such as status products. Fransen et al. (2008) found that raised death thought accessibility led to higher monthly spending intentions for entertainment purposes, but also for charitable donations. A study conducted by Das and colleagues (2014) showed that distal MS spurred purchase intentions irrespective of the product’s role as a resource for individual self-esteem needs (i.e. health, alcohol, or being in a relationship), conscious thought processes, and fear-based framing of product advertising, pinpointing that MS may influence buying intentions without consumers’ conscious awareness. Collectively, these studies present a substantial body of empirical evidence to suggest that increased spending intentions may be a coping mechanism to fend off death anxiety. The simple act of buying may reduce death anxiety because it provides an opportunity to enforce the preeminent materialistic worldview while also reinforcing self-esteem through adherence to cultural standards of success. In line with past research, we therefore suggest the following:

**Proposition 2:** Exposure to climate change threats increases individuals’ propensity to enhance self-esteem by acquiring material possessions and strengthen consumer cultural worldview, overall leading to increased consumption.

**The Role of Materialistic and Pro-Environmental Values**

The precise behavioral manifestations of coping with climate change-related death thoughts depends on the extant cultural worldview an individual adheres to. Our society’s high regard for material possessions exemplifies a cultural standard that requires the acquisition of excess material possessions to showcase success and fulfillment. Thus, consumers high in materialistic values are more likely to increase consumption in response to climate change threats compared to consumers with lower materialistic values. As Dickinson (2009, p. 7) surmised, “people who find self-esteem via materialism and an ideology of entitlement will probably buy more SUVs and become more antagonistic toward environmental causes and points of view, … In contrast, people who find self-esteem through humanist ideologies or environmentalism should become increasingly militant and vocal about their causes.” In a TMT context, it has already been demonstrated that, for consumers who hold stronger pro-environmental values or for whom pro-environmental norms are made salient, eliciting MS leads to increased pro-environmental attitudes and desire to address environmental concerns, particularly when subjects were primed for unconscious mortality salience and thus employing distal cognitive defense mechanisms. For example, Vess and Arndt (2008) observed that after using a distal MS prime, levels of environmental concern were raised or lowered depending on the individual’s value structure and dependence on the environment as a source of self-worth. Similarly, Fritsche et al. (2010) found that pro-environmental attitudes were strengthened in response to activating environmental focus norms while MS remained in the subject’s subconscious. Summarizing, we propose the following:

**Proposition 3:** Compared to consumers with lower materialist values, consumers with higher materialist values will exhibit increased consumption intentions after exposure to climate change threats.
Proposition 4: Compared to consumers with lower environmental values, consumers with higher environmental values will exhibit decreased consumption intentions after exposure to climate change threats.

As people can adhere to more than one ideology, thinking about the death threat posed by climate change can result in cognitive dissonance when environmental concern and a tendency to promote conservation behavior conflict with an individual’s self-esteem goals within some other ideological context, such as consumerism. This explains the existence of “materialistic environmentalists”, for example (Dickinson 2009). However, this viewpoint contrasts with Kilbourne and Pickett’s (2008) observation that pro-environmental beliefs are negatively associated with materialistic values. They argued that, in a conflict between both values, individuals experience cognitive dissonance and seek to preserve their self-image by altering either their material aspirations or their beliefs about the consequences of their consumption on the environment. The authors claimed that materialistic desires usually prevail since materialism “is institutionalized in American society and is continuously rewarded and reinforced through interactions with society” (Kilbourne and Pickett 2008, p. 891), while pro-environmental values are less socially entrenched. This leads us to propose that:

Proposition 5: After exposure to climate change threats, materialist values will have a stronger effect on consumption intentions compared to pro-environmental values.

TMT and Sustainable Consumption

There are consumptive options geared toward limiting natural resource depletion. Some of these more sustainable options are: (1) green product purchase which is geared toward the acquisition and use of products designed to limit negative environmental impacts (Strezhakova and Coulter 2013); (2) reduced consumption which focuses on repairing broken goods, avoiding impulse purchases and other unnecessary acquisitions (Gilg et al. 2005); and (3) voluntary simplicity which is a term originally describing a conservation-oriented way of living devoid of “exterior clutter” and geared toward minimizing one’s consumption and dependency (Leonard-Barton 1981). While no prior studies analyzed reduced consumption or voluntary simplicity in a TMT context, Rahimah (2018) examined the effect of death anxiety on green product purchase, finding that consumers with higher self-reported levels of mastery, social responsibility, and death anxiety showed an increased intention for green product purchase. However, Fritsche and Häfner (2012) induced existential threat and analyzed participants’ attitudes towards statements that expressed anthropocentric, biospheric, and global motivations of generalized pro-environmental action. The results showed that distal MS resulted in decreased pro-environmental motivations when generalized pro-environmental behavior was not seen as a direct benefit for human society, or relative to participants’ self-identity. Finally, Van Bommel and colleagues (2010), as well as Mandel and Heine (1999) found that MS increased the desire for more expensive, high-status products. Griskevicius et al. (2010) applied a status motive prime to a green product purchase context and found that, when exposed to MS and a status motive prime, subjects preferred green products to traditional luxury products, even when they were more expensive. This indicates that MS and high-status associations may increase the appeal of green products. At close inspection, green buying may be construed as consistent with materialist values and common consumerist culture because green buying offers a loophole for continued consumption (e.g., Jackson 2009; York et al. 2003). However, when presented with a choice to buy a traditional (non-green) product or a green product, MS may have an impact on the outcome of this choice. We suggest the following:

Proposition 6: Mortality salience increases individuals’ preference for green products (compared to traditional products), independent of materialist values.
**Proposition 7:** Compared to consumers with lower environmental values, consumers with higher environmental values will exhibit increased preference for green products after exposure to mortality salience.

Some authors demonstrated that green product purchase does little in mitigating the macro-level environmental impacts of consumption (e.g., Jackson 2009), qualifying it as a partial corrective at most in that it still mainly serves financial business goals and promotes the continuance of consumption-intensive lifestyles. Ultimately, the limits of the earth’s natural carrying capacity, and the need to curb overconsumption as a main driver of climate change (York et al. 2003) will require consumers to embrace new outlooks on life that are less concerned with material possessions. Accordingly, Seegebarth and colleagues concluded that “we should prioritize the buying decision (to buy/not to buy) over the question of whether social or ecological products are consumed” (Seegebarth et al. 2016, 90). Individuals who reduce consumption or voluntarily simplify (“downsize”) their lifestyle disengage (partly) from a materialistic lifestyle by avoiding the purchase of unnecessary items (Segev et al. 2015). Past research providing evidence on consumption avoidance/reduction is sparse, in general and particularly in the context of TMT. As the consumer behavior-related studies on TMT suggest, individuals are more inclined to engage in the culturally sanctioned pursuit of amassing wealth, possessions, and resources as a way to validate themselves in society, overcome feelings of insignificance, and to feel good about themselves (Kasser and Sheldon 2000), indicating that pro-environmental norms would need to override the “urge to splurge” (Arndt et al. 2004) to effectively reduce consumption. We propose the following:

**Proposition 8 a/b:** Mortality salience decreases individuals’ propensity to a) actively reduce consumption or b) voluntarily simplify their lives.

**Proposition 9 a/b:** Compared to consumers with lower environmental values, consumers with higher environmental values will exhibit increased efforts to a) actively reduce consumption or b) voluntarily simplify their lives after exposure to MS.

The extension of TMT to the context of climate change and consumer behavior promises a variety of significant and important findings, which may spark psychological and behavioral interventions. Figure 1 summarizes the conceptual framework of the study.

**Figure 1: Conceptual Framework**

**Implications for Research and Public Policy**

The set of nine propositions developed and discussed above is a first attempt to frame terror management in the context of climate change and overconsumption. Future studies could further explore and empirically test the suggested relationships, for example by employing
qualitative or experimental designs. Findings can inform research and public policy in several ways. First, an extension of TMT in the overconsumption context presents a new perspective in psychology research. Similarly, the inclusion of psychological factors in climate change research is still an underdeveloped field of inquiry.

The preliminary research results reported above re-emphasize that the relationship between MS and specific forms of consumption (overall spending versus green product purchase, for example) may depend on individuals’ cultural worldview and identity, and the focus norm present at the time of the MS induction (pro-environmental or other). Framing of climate-change messaging can invoke such pro-environmental norms and highlight associated behaviors. However, if messages mainly focus on the threat to mankind, they might ultimately increase consumption. According to TMT, if the perception of the risks associated with climate change increases death thought accessibility, evoking climate change to encourage environmentally responsible behaviors may backfire for some consumers causing them to adhere to the values of consumerism which are a significant component of the westernized cultural worldview (Choi et al. 2007). In other consumers who adhere to pro-environmental values climate change framing may successfully reinforce more sustainable consumption patterns. This is why future research should also analyze the interplay of TMT, materialism, and pro-environmental values in the sustainable consumption context. It can also be critically explored what role the media can and should play in reducing the likelihood that climate change messaging leads to increased MS and, subsequently, counterintuitive and calamitous increases of consumption.

Contrary to other socio-pathologies such as substance abuse, public policy rarely points at overconsumption in a preventative context, possibly due to the inherent challenge of aligning economic growth and reduced consumption. Nonetheless, it is paramount to avoid that growing exposure to the consequences of climate change will in fact entice consumers to cope through material wealth and increased consumption, as feared by Kasser and Sheldon (2000). Substituting traditional with “green” products does little in mitigating the macro-level environmental impacts of consumption (e.g., Jackson, 2009), qualifying it as a partial corrective at most in that it still mainly serves financial business goals and promotes the continuance of consumption-intensive lifestyles. Given the dominance of corporate promotional campaigns that link product consumption with happiness and achievement, consumer education programs should encourage decreased consumption or alternative consumption (e.g., collaborative consumption instead of product ownership). Future research should study whether emphasizing the personal rather than the societal benefits for doing so may be more effective than macro-level messaging about mitigating climate change which may induce death anxiety and distal defense mechanisms.

References


The “Esperanto” of business... or how to be successful in life: A postcolonial reading, using semiotics, of advertisements for English courses in Brazil

Marcus Wilcox Hemais, IAG/PUC Rio - Pontifícia Universidade Católica do Rio de Janeiro
Luis Alexandre Grubits Pessoa, IAG/PUC Rio - Pontifícia Universidade Católica do Rio de Janeiro
Denise Franca Barros, PPGE/Unigranrio – Universidade do Grande Rio

Introduction

It is undeniable that knowledge of the English language for peoples that do not have English as a native language is important, given the strong presence of English in economic, political and cultural spheres of the globalized world (Pennycook 2010), reinforcing the fundamental relationship between globalization and the English language (Ortiz 2006). Nowadays, having such knowledge of English enables individuals to achieve many valuable benefits, such as access the best positions in the job market (Cagnan 2008); a successful professional life (Boussebba, Sinha, and Gabriel 2014); ease of communication anywhere in the world, given English is a lingua franca (Mufwene 2010); as well as access to abundant information, since numerous books and articles are written in English every year, by authors in different parts of the world, not limited only to English speaking countries (Mendieta, Phillipson, and Skutnabb-Kangas 2006).

The growth of importance of the English language in the globalized world starts in the post-II World War period and intensifies around the time the US becomes the sole global hegemonic power, with the end of the Cold War (Mufwene 2010; Steger and Roy 2010). Unlike Latin and French, which were once global languages because they were adopted by elites worldwide, English was expanded due to the association of the language with profitable trade and social activities (Assis-Peterson and Cox 2007). Today, in the business environment, there are indexes to measure fluency in English, such as the Business English Index (BEI), that measure the workers’ “competence” in speaking English within companies. More than a synonym for high culture, therefore, English should be seen as a universal language, fostering economic development and world union (Phillipson 2001).

Knowledge of the English language has also been valued in formal education, both at the university (Varman and Saha 2009) and the primary education levels (Choi 2003). International political organizations, such as the World Bank, have been funding education worldwide, emphasizing the domination of European languages, in particular English, at the expense of local languages, resulting in serious “educational failures” (Skutnabb-Kangas and Phillipson 2010). For instance, textbooks from the US or Europe used in several countries present a Eurocentric vision of the world. They portray backwards stereotypes of the Global South and embellishment and glamorization of the Global North, to generate envy and desire for such a life, leading one to believe that learning English is the best means to achieve it (Phillipson 2001).

English courses provided out of formal education are another agent that promotes the language globally, which is a strong reality in Brazil. In all, 95% of Brazilians who take English courses out of formal education also studied English at school (Global English 2013). However, they believe that the teaching of English in private schools is deficient, while in public schools, inefficient (Assis-Peterson and Cox 2007). This belief contributes to the growth of this industry in the country: in 2013, English courses made R$ 4.8 billion, an increase of 47% in comparison to 2012 (França 2014). These numbers have attracted large global language learning companies, which operate in the country offering English and other language courses over the...
Internet. With three million online language students, Brazil is one of the countries with the largest number of users of this form of education (Lepri 2013).

To promote themselves, the companies providing online English courses run commercials with messages that discuss the importance of learning the language and showing the company as a highly qualified institution to teach. There is, however, another way to interpret the content of these commercials, which is far less in line with showing off the qualifications of the language companies. Based on a postcolonial perspective, it is possible to observe that these commercials reinforce the Eurocentric vision of superiority of the Global North over the Global South (Said 1990) and how the command of the English language can be a form of salvation (Phillipson 1992), one that compensates the cultural backwardness associated with knowing only a local language. The use of such commercials, therefore, both reinforce the ideological control of Eurocentric countries over Brazil and the rest of the world, limiting forms of self-thinking, and also suppress the importance of cultures (and their languages) as expressions of local peoples’ identity, fostering their replacement for a dominant exogenous culture (Said 1990). It is worth mentioning that the term Eurocentrism will be used in this paper to denote “the countries in the Global North with the United States at its center” and how they have distorted the social world in order to “dominate the world and its ideas” (Varman 2019, p.2).

Marketing scholars have generally ignored postcolonial discussions, in spite of its importance in other disciplines (Jack 2008). According to Varman (2019):

> Over 150 research papers published in the last year in the three leading journals - Journal of Marketing, Journal of Marketing Research and Journal of Consumer Research – less than 3% of the papers covered issues outside the Global North. Such a skewed attention to the Global North in the name of scientific rigor and quality of research reflects how academic privileges within the discipline in the form of Eurocentrism unfold and how they create research priorities, agendas, and dependencies across the globe.

Despite the marginal position of postcolonial discussions in the area, some authors - both from the Global North and the Global South - have tried to overcome this problem: Patterson and Brown (2007); Sreekumar and Varman (2016); Touzani, Hirschman, and Smaoui (2016); Varman (2019); Varman and Saha (2009). In their efforts, these researchers have shown that the marginality of such important debates have resulted in many hiatuses in the area’s literature, such as, for instance, how commercials, especially those related to English language companies, are used as a tool for Eurocentric valorization (Jack 2008). This means that knowledge about the ways through which marketing communication has been used for larger geopolitical purposes is limited.

We join the efforts of these authors and engage in these discussions with the objective of analyzing – through a postcolonial perspective based on the concepts of Orientalism (Said 1990) and Linguistic Imperialism (Phillipson 1992) – how advertisements for English courses in Brazil reinforce the importance of the English language as a way of overcoming the backwardness of local culture, thus stressing the hierarchy between the Global North and the Global South. By following this perspective, it is hoped that the present study can help to further bring light on the asymmetries colonialism has created (and postcolonialism still maintains) over peoples of the Global South, in an attempt to develop more awareness of this lasting problem and, thus, find ways to overcome it.

The remainder of this article is divided into six more sections. The next section discusses the perspective of Orientalism, developed by Said (1990). The third section discusses how the English language has been used to maintain the postcolonial hierarchy between the Eurocentric
world and the rest of the world. The fourth section presents a discussion on the postcolonial practices in English language courses. The fifth section discusses the methodology, followed by a section with the findings of the study. The seventh, and last, section presents the final considerations.

**Orientalism according to Edward Said**

Postcolonialism is a broad term that harbors diverse theoretical perspectives which have in common the questioning of continued asymmetries between the Global North and the Global South, even after the end of colonial domination of the latter by the former, as a way of maintaining Eurocentric control over the rest of the world. An important postcolonial theoretical perspective that explains this continuity of dominance of the North over peoples of the South is the concept of Orientalism developed by Edward Said (1990). According to Said, Orientalism is based on the ontological and epistemological distinction the Global North has created of itself and the Global South (i.e., the ‘Self’ and the ‘Other’) as a way of highlighting European culture as superior when compared to other cultures, which have become a kind of substitute identity, of clandestine nature.

Said develops his thesis by analyzing how the West has created knowledge about Asia and the Middle East by constructing a representation of the Oriental other based on categories, classifications and images depicted in Anglo-French-American literature and that had more to do with the way Westerners saw themselves through a lens of superiority over non-Westerners than the reality of the peoples under study (Said 1985). In doing this, the West has been able to associate the Orient more to a cultural production rather than an existing society with an identity of its own. For Said (1990, p.18), Orientalism, therefore:

> Is not an airy European fantasy about the Orient, but a created body of theory and practice in which, for many rations, there has been a considerable material investment. Continued investment made Orientalism, as a system of knowledge about the Orient, an accepted grid for filtering through the Orient into Western consciousness, just as that same investment multiplied—indeed, made truly productive—the statements proliferating out from Orientalism into the general culture.

Said believes that Orientalism has become a concept associated to the notion of progress and development. While Eurocentric ‘races’ were carefully described as developed, innovative and advanced, Eastern societies became characterized as exotic, mysterious, magical, esoteric, in allusion to something of an irrational nature, of inferior status. According to Said (1990, p. 45), these ‘inferior’ races had a glorious history, but have lost importance in the present world system since “their great moments [are] in the past; they are useful in the modern world only because the powerful and up-to-date empires have effectively brought them out of the wretchedness of their decline and turned them into rehabilitated residents of productive colonies”.

The Eurocentric reasoning related to a superior Self and an inferior Other discussed by Said, which helped justify colonial (and postcolonial) expansion, was constructed based on the manner in which European Cartesian paradigm of rational knowledge was developed. According to Quijano (2007, p.172), while the “subject” (i.e., the self) is a category that represents an isolated individual, one that “constitutes itself in itself and for itself”, the “object” (i.e., the other) is also a category but both different from the subject and also external to it. If the subject, therefore, is bearer of “reason”, and the exogenous object is merely “nature”, a hierarchy between both parts is created, through which the former is seen as more important than the latter. It was the superior races’ moral obligation, therefore, to bring modernity to these
lesser developed others and help them to grow, in order for them to, eventually, become ‘civilized’ societies.

Eurocentric races were suited for such responsibility, according to Said (1990), since they considered themselves to be the only ones who produced knowledge that was seen as valid, which made them “educated” individuals - as opposed to their irrational peers, whose knowledge was seen as invalid and not worthy of consideration, since it was still in a primitive stage of development (Alcadipani and Caldas 2012). Such way of looking at knowledge was a consequence of how the concept of Orientalism became an academic subject, as of the early nineteenth century, after Western researchers began studying “ancient civilizations” and their languages. In doing this, they were able to establish a historical relation between the West and the Orient and show scientifically how in the pasts of Oriental peoples were the roots of the modern triumphant Western societies (Said 1985). Academic exploration of the Orient, hence, helped to diminish the importance of Oriental knowledge to one whose only purpose was to be a “preparation” for the modern Western rationality that followed (and overcame) it: “the diverse forms of knowledge developed by humanity throughout the course of history would lead gradually toward the only legitimate way of knowing the world: the way that is elaborated by the technicoscientific rational of modern Europe” (Castro-Gómez 2008, p. 267).

Given the rational scientific nature of such reasoning, any individual who questions this way of thinking should be considered an agitator, a troublemaker, one that is not acting as a docile native who overlooks the violence foreign domination imposes over colonized peoples (Said 1990). It is hard, therefore, for voices from the rest of the world that put in check Eurocentric legitimacy over global knowledge to be heard as legitimate. After all, it is not their place to put in check Western rationality since “‘he’ is not as human as ‘we’ are” (Said 1990, p. 117).

Said’s work on Orientalism opened up possibilities for other critical perspectives on the continuity of colonial rule of the Global North over the Global South to be developed by academic researchers (Castro-Gómez 2008; Prakash 1995), even in the area of marketing (Jack 2008). One way Orientalism has materialized itself, especially with the end of the Cold War, was through the diffusion of the English language and its association to modernity, prosperity, business, among other positive aspects. The next section will engage in this discussion and show how English has been used for postcolonial purposes.

**English language as a postcolonial tool**

Since the end of the Cold War, with the victory of capitalism over communism, the US has been developing soft power mechanisms (Nye 2004) to ensure its global hegemony, further stressing the hierarchy between the Global North and the Global South. The belief in the superiority of the Eurocentric world encouraged colonized peoples of the Global South to mimic their Northern counterparts, imagining that only through such behavior would it be possible for them to achieve development (Bhabha 1994).

Language has been one of the main forms used by colonized peoples to emulate the Eurocentric world (in particular, the US). Since it is considered the language with the highest number of words (between 400 and 500 thousand), English is seen as the best of all languages as a form of expression and thought (Pennycook 2007). The belief in the superiority of the English language created in colonized peoples the feeling that it was necessary to communicate using the language of the colonizer, securing access to the endless benefits not reachable in the same way when using the local, and less developed, languages (Skutnabb-Kangas and Phillipson, 2010). In Brazil, as well as in many other countries, such as China, Japan, and Russia, learning English is seen as a must for anyone aspiring for professional and personal growth (Anjos
leading its peoples to marginalize their own languages as “impure” (Ashcroft, Griffiths, and Tiffin 2002).

The worldwide expansion of the English language has been promoted due to the advances of the post-Cold War neoliberal capitalism and the benefits associated with this form of political-economic development. Considering that English is the language adopted by important international capitalist political organizations, as well as the largest transnational corporations and elites in many countries, it ends up being used to decide the destiny of the majority of the world’s citizens (Phillipson and Skutnabb-Kangas 1996). The command of the language, therefore, becomes an access to the developed neoliberal world, represented by the large multinational companies, the financial market and its million-dollar negotiations, and the access to the most famous and popular Chief Executive Officers (CEOs). However, more than entering this romanticized world of the Global North, language fluency promises “salvation” of local peoples from the backwardness of the Global South and their lack of possibilities for development (Pennycook and Coutand-Marin 2003).

The discourses favoring the global massification of English fail to consider that it is also an “exclusionary class dialect, favoring particular people, countries, cultures, forms of knowledge and possibilities of development; it is a language which creates barriers as much as it presents possibilities” (Pennycook 2010, p. 116). These barriers materialize in the lack of access of colonized peoples to education, jobs, and other activities that require English proficiency (Boussebba, Sinha, and Gabriel 2014; Choi 2003), inhibiting their creativity and expressiveness (Phillipson 1996).

The valorization of English creates a hierarchy between languages so that those with greater global reach become more important than others that are spoken only in certain regions of the world and are therefore reduced to “mere dialects” (Phillipson 1992). Such hierarchy, however, represents more than a scale of importance of languages; it shows the asymmetrical structure of the relations between the Global North and the Global South, i.e., the superiority of the Global North’s ethnicities, races, and languages, over those of the Global South (Phillipson 1997). Therefore, the Global South is portrayed – both by colonizers and by its own colonized peoples – as a place in persistent underdevelopment (Escobar 2012), where there are constant obstacles and threats to the advancement of civilization (Mignolo 2009).

The hierarchy between languages is criticized for being a form of “linguistic imperialism” (Phillipson 1992), which is intended to maintain the US as the global hegemon. Thus, more than just the expansion of a language, the globalization of English is seen as the expansion of the Global North’s neoliberal ideological discourses (Pennycook 1994). The neo-imperial characteristics of English are observed in the development of the language in the educational system worldwide. In several non-Eurocentric regions, local elites seek language schools to learn English and obtain better qualification to access job opportunities in the local and international markets (Li 2002; Sliwa 2008). Local governments have also played an important role in this process of spreading English by encouraging teaching English in schools and universities, to the detriment of other languages (Byun et al. 2011; Hashimoto, 2002). In some cases, English is imposed as the only medium of instruction, usually in schools and universities attended by the local elites (Choi 2003).

In this educational process, teachers coming from developed Anglo-Saxon countries are fundamental to “correctly” teach English and maintain its neo-imperialist connotation (Phillipson 1992). Supposedly, the ability to command the structure of the English language and its intrinsic cultural nuances is unlikely to be found in non-native teachers, given that the education level they received in their countries is seen as “primitive” (Alcadipani and Caldas 2012), making them less qualified to play the teaching role. The presence of a native English
teacher also has the purpose of reproducing a situation of authoritarianism, since the power discrepancy between teacher and student is exacerbated by the fact that the teacher thoroughly dominates the language (Choi 2003). Even among non-native teachers, colonial aspects, such as preference and superiority for the British and American accent, would be widely disseminated, either by the teachers’ discourse or the educational material (Anjos 2016).

One global institution that helps to disseminate such postcolonial features of English is language courses. The next section of the paper discusses how such institutions perpetuate control of the Global North over the Global South by posing as the best alternative for individuals to learn English.

Postcolonial practices in English language courses

In addition to what happens in universities and schools, the neo-imperialist scenario posed by the teaching of the English language is also perceived in English courses provided out of formal education. The practice of hiring native English teachers is widespread in these courses, and it is considered a strategy to attract students and guarantee the quality of the services provided. It does not matter whether the teacher has a university degree in linguistics or related areas, because “when a student searches for an English course, they essentially do not want to know if the teacher went to the US several times, if the teacher lived or even studied abroad” (Souza 2013, p. 33).

In Brazil, language courses (in particular, English courses) are perceived as the right places to learn the language, since the English taught in formal education institutions (in particular, the public ones) is not enough to gain full knowledge of the language (Rosa 2003). This notion, together with the belief that those who do not know English are considered “illiterate” for the labor market (Cagnan 2008), shows that there is an ideology – legitimized politically, culturally and socially – that strongly supports the assumption that learning English is imperative.

In this context, it is quite easy for English courses to make the case with their students that they can deliver proficiency, arguing that they have better-prepared teachers, adequate infrastructure, homogeneous classes, and enough time to provide appropriate language exposure. Such advantages ensure that language courses are a “successful environment” for English learning (Assis-Peterson and Cox 2007). They guarantee greater possibilities for indoctrination of individuals from colonized societies, who see in such courses their opportunity to access the Global North.

Teaching English ends up having a vocational status and the discourse put forward in the commercials has a major influence in reinforcing the idea of employability based on learning English from courses offered out of the formal education system (Rosa 2003), whose quality standard would guarantee knowledge equitable to native speakers (Batista and Oliveira 2013). This narrative construction occurred in the specific context of the Cold War, when several technical cooperation agreements were signed between Brazil and the US (Barros and Carrieri 2013). Behind the justification of promoting the development of underprivileged regions, these agreements favored private investments and the installation of North American companies in Brazil, at a time when the country experienced a process of intense industrialization.

The market for language courses, estimated in 2012 by the Brazilian Franchising Association, was populated with more than 6,000 branches of more than 70 franchise brands. Assis-Peterson and Cox (2007) point out that private companies have much to gain from the belief in the total ineptitude of language teaching in formal education institutions. It is no wonder that since the late 1990s it is possible to observe examples of English teaching outsourcing in middle-school and high-school. Alves (2003) analyzes the experience of outsourcing language teaching and concludes that one of the main problems is the homogenizing posture of teaching, needed to
guarantee profitability at high levels, but that does not necessarily guarantee the quality of the service, although it is often perceived as such.

**Methodology**

In order to carry out the objective of this study, we analyzed commercials of a well-known online English school operating in Brazil: English Live, previously called English Town. The choice of studying the commercials of this company was due to both its broadcast and online advertising. According to the company, which is established in Sweden, there are more than 100 thousand students in Brazil. The commercials presented between 2014 and 2017 had a similar format, featuring very well-known actors/personalities of Brazilian comedy. The thirteen videos collected for this research, listed in Table 1, were available both on the company’s website (https://englishlive.ef.com/pt-br/comerciais/) and on its YouTube page (https://www.youtube.com/channel/UC01_CdyS0F3cGY_j9P-2vyA).

All the videos were watched by each of the researchers individually, who carried out a pre-analysis of the material. Subsequently, the audio of the commercials was transcribed, and the images shown in each of them were described. The text that came out of this initial analysis process was then submitted to a joint analysis.

From the theoretical and methodological point of view, the study used the generative trajectory (Greimas and Courtés 2008), which can be defined as a semiotic theoretical model of meaning that is general enough to approach all significant human production, verbal and non-verbal. The generative trajectory is a stratified model, formed of distinct levels, from the most in-depth and most abstract (fundamental syntax and semantics) to the most superficial and concrete (narrative syntax and semantics), that of the discourses manifested in the different verbal and non-verbal languages.

Finally, the commercials’ content and expression plans were methodologically separated. The study of the content plan considered the three stages of the generative trajectory, emphasizing the narrative and discursive levels.

**Data Analysis**

The following section presents the analysis of the collected data and is divided into three subsections. The first, discusses the narratives of the enunciations, with a focus on the manipulation path. The second, analyses the narratives of the enunciated and its manipulation strategies. Finally, the third subsection presents the discursive level of the narratives and the ways the narrative is concretized.

**Narratives of the enunciation: the manipulation path**

Observing the corpus of the data collected, from the point of view of the narratives of the enunciation, English Live plays the role of the sender, who manipulates the consumer-receiver by leading them to believe in the importance of the command of the English language (Phillipson 2001), and, thus, the need to “perform” (in this case, register on the course offered). The “performance” would put the receiver in conjunction with the object-value “knowledge,” which enables the receiver to face the competition of professional life and to enjoy the benefits of the so-called globalized world (Pennycook 2010).

The “knowledge” being offered, in this case, is one originally of Eurocentric nature, which ignores knowledge of any other origin given its still primitive stage of development (Alcadipani and Caldas 2012). Such superiority of Western knowledge comes from the fact that Eurocentric ‘races’ are seen as developed, innovative and advanced, while Eastern societies are irrational,
backwards, of inferior status, uncapable, therefore, of developing knowledge worthy of being learned (Said 1990).

It may be said that, in the analyzed narratives, the English course plays the role of a “magical object” – the same role of a “wand”, a “sword”, or a “magic carpet” in fairy tales – that allows the subject to enter into a state of conjunction (being-able-to-do) with the object-value – such as “going to the ball”, “marrying the princess” in fairy tales – in this case, speaking English to be successful and fully enjoy the opportunities the Global North offers the world (Mufwene 2010; Phillipson 1992).

The idea that the English course can be seen as something magical should not be understood, in this case, as a depreciation; unlike the interpretation the Eurocentric world has historically associated to the Global South when it characterized this region of the world as a place of mythical, esoteric, magical and exotic features (Said 1990). The magical attachment, here, is one of positive meanings, one that associates English courses to instancy, i.e. the possibility of someone to immediately access great knowledge that only certain institutions/peoples (of the Global North) obtain (Quijano 2007). In the analyzed commercials, the feeling of lack that gives meaning to the narrative (Hénault 2006), is the feeling of urgency to be able to integrate an environment in which English is a mandatory condition for professional and personal success (Cagnan 2008; Boussebba, Sinha, and Gabriel 2014).

It is possible to say that the narratives of the analyzed texts are based, at the deep level of the discourse, on the semantic opposition: [knowledge] vs. [ignorance], as shown in the semiotic square below (Figure I).

Although the concept of ‘command of the English language as a condition for professional and personal success’ – achieved after using the English Live teaching services – is dominant in the narratives, it was observed in the analysis that having knowledge of English gains other meanings in the advertisements. Deep values, such as the subject’s own identity or independence, are put on the videos by the sender to captivate the receiver. These values, at times, substitute the “professional success” from the center of the discourse and help to further captivate the image that European culture - in particular, Anglo-Saxon culture - is superior to other cultures with identities of clandestine nature (Said 1990). This discussion will be continued in the following subsections, when some of the English Live commercials are analyzed in more detail.

The trajectory of the sender can be divided into two stages: (1) the assignment of semantic competence; and (2) granting modality of competence.

In granting modality of competence, which is the manipulation phase, the sender gives the receiver the modality values of wanting-to-do, having-to-do, knowing-how-to-do, and being-able-to-do. The assignment of semantic competences corresponds to the persuasive-making (making-to-believe), in which the sender (using resources of the discursive level of texts) presents themself as close and reliable and, at the same time, powerful (in the sense of having knowledge) – an artifice typical of English language courses (Assis-Peterson and Cox 2007) - , making the subject believe it has ability to predict management trends.

In the analyzed corpus of the data, manipulation sometimes occurs based both on seduction and sometimes on intimidation (in cases where the texts focus on the risks of ignoring the importance of having command of the English language), with the manipulator making use of the competences of “knowing” and “being able” in their persuasive-making, which leads the subject-receiver to wanting-to-do or having-to-do something, in this case, learn English using the services offered by English Live, given the company’s outstanding qualifications as an
English teaching institution, an artifice that reinforces the idea that English language courses are the best alternative to anyone who seeks to learn English (Assis-Peterson and Cox 2007). Such strategies are carried out in the narratives of the enunciated and will be discussed in the analysis conducted in the next part of this section.

The counterpart of the sender-manipulator’s persuasive-making is the interpretative-making of the subject, which results from the acceptance or refusal of the contract proposed by the manipulator. Such interpretation is made by the veridictory modalities represented in Figure II of the semiotic square:

[Insert Figure 2 about here]

The acceptance of the proposed contract by the receiver depends on the belief in the veracity of the sender and their discourse. In view of the close link between trust and belief, the contract between sender and receiver can be defined with a fiduciary agreement, because “trust between people underlies trust in their words about things and the world, and ultimately trust or belief in things and in the world” (Barros 2002, p. 37).

Both the persuasive-making and the interpretive-making are based on the semantic competence of the sender and the receiver, respectively, which are formed by their feelings, values, beliefs, and knowledge. According to Barros (2006, p. 49):

(...) the communication subjects cannot be considered as ‘empty houses,’ but as houses full of projects, aspirations, emotions, knowledge, beliefs that will determine how they persuade and interpret. Persuasion and interpretation strategies thus vary historically, from culture to culture, from society to society (from social class to social class). The circle is complete: the subjects’ knowledge, beliefs, feelings, and values are the result of previous communication-manipulation-interaction relationships, and other subjects continuously change and are built in each new relationship of communication. They are subjects with other competencies, old and new, modalities and semantic.

In the case of the analyzed commercials, it is possible to say that the acceptance of the fiduciary contract by the receiver is facilitated because of the recognition of the sender’s previous ethos; the result of the receiver’s previous experiences and beliefs (their experience with language courses, English in particular); and the inter-discursive construction of a certain text with the other texts that preceded it.

English Live commercials interact with each other, building a consolidated image of the sender, from the perspective of the receiver. Considering that the main players in the English language market establish, based on the inter-discursivity of their texts, the identity of the segment as a whole (in addition to each company’s identity), it is fair to assume that the texts analyzed in this work appropriated the collective ethos of the market to facilitate the acceptance of their fiduciary contracts.

Depending on the acceptance of the fiduciary contract between sender and receiver, the narrative outcomes are observed, in which the receiver can be sanctioned positively or negatively. In the analyzed texts, the positive sanction is characterized by the confirmation, through the examples of characters of the commercials that, when having command of the English language, are successful (Boussebba, Sinha, and Gabriel 2014); while the negative sanction is more aggressive, portraying contexts where characters who do not master English fail (Skutnabb-Kangas and Phillipson 2010) and usually end up in a ridiculous situation. Both these types of sanction reinforce the backwards stereotypes of the Global South and the embellishment and glamorization of the Global North, generating envy and desire in colonized
peoples (Said 1990), leading one to believe that only by learning English is it possible to be saved from such backwardness (Phillipson 1992) and achieve everlasting benefits (Phillipson 2001).

**Narratives of the enunciated: manipulation strategies**

The narratives of the enunciated may be defined, in a simplified way, as the “stories told” in the texts. At this stage of the analysis, the narratives are observed less abstractly than in the narratives of the enunciation, and the sender’s manipulation strategies are more evident, using both seduction and intimidation to entice the receiver. It is worth mentioning that this level of analysis is often confused with the discursive level, in which the narratives are appropriated by the subject of enunciation, gaining temporal, auctorial and spatial concreteness, parallel to the processes of thematization and figurativization.

The analysis of the twelve videos shows the repetition of the following actors in the role of subjects of the narrative (or “stories told”): executives or athletes (in a situation of command (or not) of the English language), native English speaking teachers, native English speaking executives (sometimes called “gringos”) and, finally, an omniscient presenter (in off or portrayed by one of the actors, who represents the English Live course). In many ways, such subjects of the narrative represent the mirage of the typical successful individual of the Global North (Said 1990), one of superior status, which backwards peoples of the Global South desire to emulate (Bhabha 1994).

It is worth noting that, regardless of the narrative, the videos present the main attributes of English Live, namely: rapid and customized learning (in the student’s rhythm, at the time and in the location of the student’s preference), interactivity of the method, contact with native English-speaking teachers, and international diploma/certification. The slogan closing the videos is “English Live: Live English for you to change your life”.

By advertising that its teachers are native English-speaking professionals, English Live establishes that its means of teaching English is a “correct” – and neo-imperialist – one (Phillipson 1992). This is based on the belief that only Anglo-Saxon teachers are seen to be able to command the structure of the English language and its intrinsic cultural nuances (Souza 2013). By keeping a staff of only native English teachers, English Live reproduces a situation of authoritarianism, since the asymmetrical relation between teacher and students is exacerbated, given the former thoroughly dominates the language (Choi 2003).

It is also interesting to highlight that English Live’s characterization of its diploma/certification as “international” reproduces the Eurocentric discourse of asymmetry between that that is local and foreign, being the latter in a more developed, evolved position than the former (Said 1990) – despite there not being any guarantees that this internationalist status is equivalent to superior quality. In doing this, EL reaffirms the long-lasting European Cartesian paradigm of a superior Self and an inferior Other, through which the superior races – who are the true holders of universal knowledge (Castro-Gómez, 2008) – have a moral obligation to help these lesser others grow, in order for them to, eventually, become ‘civilized’ peoples (Quijano 2007).

If in the narratives of the enunciation it is possible to describe a single abstract process of manipulation (described above in this section), at the level of the narratives of enunciated the concretization of the manipulation in the “stories told” implies recognizing subjects that interact with each other and take turns in the role of senders and receivers of the “stories” shown in the advertisements, according to the following examples.

The first example is the film “O gringo voltou” (The gringo is back). In the commercial, a young, junior executive hides himself as a defenseless child to avoid interacting with a foreign executive (pointed out in a tone of terror as “the gringo”) that visits the former’s company. The
presenter, a male comedian actor, then emerges to “save” the young man and recommends English Live as the solution to the problem. From then on, the course features are presented, such as speed, flexibility and the presence of English-speaking native teachers. The narrative closes with the same junior executive, now an English Live student, sitting down to a meeting with the foreigner and the presenter.

Once a backwards person, now this young, underdeveloped professional of the Global South has been uplifted to the superior level of his older, wiser Global North peer (Said 1985). Through the knowledge of the English language, he has been “saved” of the inherent wretchedness associated to the Global South and has become someone with the capacity to produce benefits for society (Said 1990). By emulating the identity of the senior executive (Bhabha 1994), he is, therefore, accepted into an elite business world and can now participate in the important decisions of any international capitalist political organizations and transnational corporations regarding the world’s future (Phillipson and Skutnabb-Kangas 1996).

The second example is the film “Feras do Mercado (Executiva)” (Beasts of the market (Female Executive) in which an executive (Paula) is described as a fierce professional with talents compared to characteristics of animals, such as an eagle (in scenes, her work is interspersed by the roar of a wild feline and the sound of an eagle). However, when she is introduced to a foreign executive, the character is intimidated and leaves the scene to the sound of a kitten. At that moment, the presenter in off says “no more gringophobia, change your life. At English Town you will speak English with confidence. Get the job of your dreams.” Highlighting the last part of the message, about acquiring a job, is essential, since it redeems – and at the same time perpetuates – the narrative that the command of the English language results in access to the best positions in the job market (Cagnan 2008). Anyone who seeks to grow professionally, therefore, is compelled to learn the language, which offers more than just simply high culture: most importantly, it fosters individuals and societies to reach economic development (Phillipson 2001).

A third example, which can be considered as a commercial not entirely associated to the corporate world, is the film “O faixa preta do inglês” (The black belt in English). It is a typical “real-life happy ending story” in which martial arts teacher Wagner accepts the challenge of improving his English by studying for eight weeks in English Live. The film features footage of the subject studying English, teaching jiu jitsu, and, finally, teaching martial arts in English and touring in iconic parts of London. The positive sanction to Wagner is confirmed when the presenter in off states that the subject managed to “teach in London”.

Geopolitically, it is important to highlight that Wagner was able to teach in London, for the capital of England is often romanticized as an outstanding example of a prosperous city from the Global North, one of the birthbeds of modern neoliberalism, where various multinational companies are hosted, the financial stock market is booming, and important CEOs reside (Pennycook and Coutand-Marin 2003). Having knowledge of the English language, therefore, has given Wagner the opportunity to be integrated into the developed Global North (Said 1990), among the world’s elite and in a perfect place where his business can flourish.

In the three commercials discussed above, the strategy of manipulation was of either seduction (in the case of Wagner’s film) or intimidation (in the first two examples, considering the ridiculous situation the characters were presented in – the junior executive who hides and the female executive evading when introduced to the foreign executive). However, in both cases, the common thread was the idea that it was essential to learn English to overcome inherent insecurities and difficulties that peoples from the Global South live with because their
languages are of inferior nature (Pennycook and Coutand-Marin, 2003) and, thus, do not permit them reach the endless benefits associated to the English language (Skutnabb-Kangas and Phillipson 2010). The manipulation was made concrete through the “stories told” in the videos, where the consumer-receiver is introduced to the study of English at EL as a way to change their lives and achieve professional success.

The analysis of the titles of the films by English Live, “O gringo voltou,” “Feras do Mercado (Executiva),” “O faixa preta do inglês,” and others that make up the corpus analyzed, such as “Aprenda inglês mais rápido” (Learn English faster), “Inglês no seu ritmo na EL” (English at your pace at English Live), or “Conheça a Julia, aluna da EL” (Meet Julia, English Live student), also help to better understand the features and benefits of the course or the testimonial nature of the advertisements.

The discursive level: concretization of the narratives

Based on the principle that every discourse seeks to persuade the receiver about its truth or falsehood, discursive mechanisms ultimately have the purpose of creating the illusion of truth through two primary effects: proximity vs. distance from enunciation, and reality vs. fiction (Barros 2006; Fiorin 2006).

At the level of discursive syntax, the variation in the type of presenter has an important role in creating effects, regarding meaning, in the texts. The main strategy identified in the films was the use of the presenter, in off, in the third person (typical of the journalistic genre), using the resource of the presenter that gives the word to the interlocutors (usually, characters of the corporate world). In the videos anchored by male comedian, he is shown as an omniscient presenter (representing the company English Live) that “crosses” the narrative of the characters. Such a variation conciliates the retreat of the sender (which generates an effect of objectivity and credibility), with the proximity of the interlocutor’s speech, whose effect is anchoring. As Barros (2005, p. 60) explains, although the syntactic feature of giving voice to fictitious and real characters produce effects of reality or a reference, such effects are:

constructed more often by procedures of discursive semantics rather than syntax, as opposed to enunciation effects. The semantic resource is called anchoring. It is a matter of tying the discourse to people, spaces and dates that the receiver recognizes as ‘real’ or ‘existing’, based on the semantic procedure of increasingly making the actors, spaces and time of discourse more concrete, providing them with sensory traits that ‘iconize’ them or make ‘copies of reality’. In fact, they pretend to be ‘copies of reality,’ and they produce such an illusion.

It is important to note that the characters in the corporate world created in the videos are simulacra of the consumer-receiver (considering the profile of prospective students: an executive, an entrepreneur or someone that wishes to be in these positions), presented usually in a stereotyped manor, which increases the relevance of this manipulation strategy.

Moving forward in the analysis, discursive semantics is the ideal arena for understanding how a given discourse appropriates the values circulating in society and, at the same time, imposes to the receiver new values that support a specific worldview, through the procedures of thematization and figurativization.

The subjects analyzed were built around the main topic: “professional success,” either in the corporate world or in other fields, such as in the case of the teacher of martial arts or athletes. Images and verbal texts were always present.
It is worth noting that the use of sport as a sub-theme of professional success is in line with the context of recent mega-events in Brazil (the 2014 World Cup and the 2016 Olympics). However, sport is also used in analogies with the business world (in the case of the movie “Seleção de Vencedores” (Selection of Winners)) and as a specific professional field that requires English for excellence in performance (in the case of the video featuring a teacher of martial arts).

Regarding the tone of the communication, it is possible to highlight the use of humor – almost all commercials use comic language and the presence of comedians. On the other hand, the few commercials that do not use humor have as essence the achievement of goals and overcoming challenges (as in the case of the video “O começo - Ana Marcela & EF Englishtown” (The beginning – Ana Marcela & EF Englishtown) featuring Ana Marcela, a professional swimmer), a typical aspect of the corporate universe.

The most representative figures are those that make up, in general, the stereotyped idea of the business world, such as human figures, computers, and sophisticated offices with open spaces. Thus, the figures and themes present in the corpus of the data ratify the inclusion of commercials analyzed in the universe of mass communication, although with more emphasis on the business and management segment.

**Final considerations**

Marketing literature has for long ignored postcolonial discussions (Varman 2019). As a result, the area offers few studies that explain how commercials are used as a tool for Eurocentric valorization (Jack 2008), helping to perpetuate the globalization of the English language as a lingua franca (Mufwene 2010). Therefore, knowledge of how this form of marketing communication is used for larger geopolitical purposes is limited.

The present study sought to better understand this phenomenon, given the hiatus in the area’s literature, analyzing, through a postcolonial perspective based on the concepts of Orientalism (Said 1990) and Linguistic Imperialism (Phillipson 1992), advertisements of English language courses in Brazil. Grounded on this critical postcolonial perspective, the classical theoretical model of Greimasian semiotics was applied, identifying the narrative and discursive strategies adopted in commercials of English Live, a global English language school.

The analysis exposed the procedures of manipulation of the receiver-consumer by the sender-company offering English courses, based on the theoretical-methodological assumptions of the French discursive semiotics. In doing this, the study also helped to understand that the sender’s make-communicative is not restricted to letting-to-know, but entails making-to-believe and implies in a making-to-make, parallel to the interpretation in the receiver’s make-communicative (Barros 2006).

Starting with the most abstract level of analysis (fundamental level and narratives of the enunciation) and continuing to the more concrete levels (narratives of the enunciated and discursive level), stereotyped characteristics of professional life were used by English Live in its commercials to build narratives in which executives or athletes (mastering (or not) the English language), native English speaking teachers, native English speaking executives (sometimes treated as “gringos”) and, finally, an omniscient presenter (representing the English Live English course) interact with each other. The “stories” resulting from this interaction between characters in the advertisements aim to manipulate the consumer, using seduction or intimidation, to accept the inescapability of learning English for professional success (Cagnan 2008; Boussebba, Sinha, and Gabriel 2014).

Such stories also help to reinforce the Eurocentric notion of superiority of peoples from the Global North over those from the Global South (Said 1990); while the former are depicted in
commercials from English Live as successful individuals, the latter are shown as weak, ignorant professionals that are not part of the globalized world because they do not speak English. The “Other”, in this case, needs saving from his backwards status, which can only be achieved if he adheres to Eurocentric ruling (Bhabha 1994).

The manipulation strategies used in the commercials are done in a subtle enough way that receivers can easily relate to the idea of being in professional and personal inferiority for not having enough knowledge of the English language. This subtlety has been key for postcolonial control of the Global North over the Global South since it substitutes the overt violence imposed during the colonial period with a covert version of such violence, which, instead of killing the colonized, erases their culture, identity, knowledge and history from the globalized world (Said 1990).

The area of marketing needs to become more aware and accepting of such postcolonial geopolitical aspects associated to English language courses and the ways in which they communicate the importance of learning English. By ignoring these issues, the area contributes to nurture the asymmetric relations regarding knowledge produced in the Global North and the Global South, further reinforcing the biased notion that knowledge produced outside of the Eurocentric sphere needs to be seen with suspicion (Alcadipani and Caldas 2012). This is especially true when this kind of knowledge is not produced in English, since the Anglo-Saxon language is sought to be the only one that has truly helped to advance societies in a global scale (Phillipson and Skutnabb-Kangas 1996).

Given this scenario, more marketing scholars from the Global South should engage with postcolonial perspective in order to help promote pluriversality in the area. By acknowledging, for instance, that marketing tools such as advertising are used by institutions of the Global North with geopolitical objectives, we can start debating the darker side of marketing which has been deliberately ignored by the area’s literature, since such discussions would also mean questioning the asymmetrical relations between scholars from the Global North and the Global South and the assumptions that knowledge developed in Eurocentric settings are of universal nature (Mignolo 2011).

Future research, therefore, can continue to explore the postcolonial aspects this article has started to question - but not nearly stressed enough - related to marketing communication by English language courses. One natural path is to analyze advertisements by other English language courses, from different countries, and compare the findings with the ones presented here. Another suggestion is to research the involvement advertising agencies used by English courses have in the development of the commercials and their content, in order to analyze how much they contribute to Eurocentric valorization. Also, studies that wish to use the theoretical-methodological apparatus of Greimasian semiotics can analyze the level of expression of the advertisements’ texts and, in particular, their visual aspects such as photography, logos, and illustrations.

References


Unravelling the Past as We Know It: A Historical Analysis of the Development of Gendered Discourses in Malaysia

Aminath Shaba Ismail, Monash University, Malaysia
Christina Lee Kwai Choi, Federation University Australia, Australia
Juliana Angeline French, Monash University, Malaysia

1. Introduction
Throughout history, consumption has always been regarded as a highly gendered practice. Most brand narratives are still constructed keeping gender in mind as the primary consideration and consumers continue to make extensive use of gendered products and brands as props in performing their gender identities (Avery 2012). Not surprisingly, consumer cultural domains themselves remain divided along gendered boundaries often representing contested sites that change historically and perpetuate over time through consumption and marketing practices (Peñaloza 1994). Despite the centrality of gender to consumption specifically and marketing in general, surprisingly little remains documented in the extant marketing literature about how gendered discursive structures develop, transform and perpetuate historically. Often subjected to poorly devised post-hoc analyses or reduced to a mere individual or gender differences variable, Schroeder, Caterall, Thompson and Fischer (2002) make the case that gender research have continued to remain in the closet in many marketing and consumer behavior circles.

From the limited research that has been conducted on gender within the discipline, most have limited their conceptualization of gender to cover only its psychological aspects (Schroeder 2003). As a result, gender has historically been studied within marketing as a construct that operates on a spectrum of either masculinity/femininity/androgyny or traditional/egalitarian gender role attitudes (Palan 2001). Little remains documented about its other facets (i.e. the contents of gender roles, sexual orientation) and how they configure in the consumption choices of consumers (Palan 2001; Schroeder 2003; Schroeder et al. 2002). Gender research within marketing have also been consistently criticized for its apparent lack of cultural specificity and analyses of power, change and social structures (Hearn & Hein 2015) in addition to displaying a general insensitivity towards temporal changes (Travis & Wallendorf 2012).

This study hopes to contribute towards addressing some of these gaps in the current marketing literature by studying the historical shifts in the contents of the dominant gender belief systems that circulated in the Malaysian Press. Specifically, this study endeavors to tackle three main research questions: (1) What has been the dominant gender belief system in Malaysia and what are its various constituents? (2) How has it been shaped, transformed and perpetuated over time? and lastly, (3) What has been the role of markets, consumer cultures and other institutions in facilitating this process? This research draws heavily on its contextual background to help theorize and develop new insights on the development of gender belief systems. Comprising of three main ethnic groups; namely the Malays, Chinese and Indians; Malaysia provides a unique context to explore this phenomenon, due in a large part to its pluralistic society.

2. Research background: Gendered discourses
Perhaps a good starting point to explore the concept of “gendered discourses” is to start the discussion with the meaning of the adjective, “gendered” in the phrase. Carrying stronger connotations than the word ‘gender-related’, the word suggests the superimposition of gender on to the person, thing, process or experience being described (Sunderland 2004). This superimposition of gender, or gendering of an individual, thing, process or experience can manifest in many forms. Quoting examples closer to home, an article featured in a newspaper...
on cooking could be considered as gendered if it appears to be written under the presumption that its readership would be women, be it as housewives, working mothers or career girls, because of their gender roles as homemakers. Certain occupational fields can also come across as gendered because of the over-representation of one gender in these fields as compared to the other (i.e. nursing and women). In other words, ‘gendering’ takes place when a person, thing or experience becomes either implicitly or explicitly associated with one gender or the other; or in some cases both (i.e. androgynous).

Keeping these connotations in mind, the term ‘gendered discourses’ have often been used to refer to discourses containing the workings of a particular set of ideas about gender in a particular segment or segments of the society (Eckert & McConnell-Ginet 2003, p. 42). Thus, when men and women are expected to behave or are represented in particular ‘gendered’ ways in a particular text, discourse analyses stemming from critical and poststructuralist traditions tend to view these as gendered discourses that position men and women in different ways (in the constitutive sense of the word) irrespective of whether or not actual behavior corresponds with them (Sunderland 2004). In this sense, ‘gendered discourses’ essentially deal with the many constituents of the gender belief system. Defined broadly as “a set of beliefs and opinions about males and females and about the purported qualities of masculinity and femininity” (Deaux & Kite 1987), its contents include gender roles, gender identity, gendered stereotypes, ideals of femininity and masculinity—all of which are responsible for setting the social parameters for how men and women are expected to behave and carry themselves in a given society. As such, by charting the historical development of gendered discourses in Malaysia, this study hopes to gain a better understanding of the evolution and perpetuation of the dominant gender belief system in the country by closely studying the developments in its constituents over time.

3. Malaysia as a Context

Characterized by cleavages between ethnic groups of diverse socio-cultural persuasions, Malaysia is often considered as the prototypical plural society (O’Brien 1980). Consisting of Malays (50.1 per cent), ethnic Chinese (22.6 per cent), non-Malay Bumiputera and other indigenous groups (11.8 per cent), Indians (6.7 per cent) and others (8.8 per cent), its population is far less unified compared to the famously homogenous societies of Japan and South Korea, or even that of Singapore (which exhibits the same ethnic composition as Malaysia but with an overwhelming Chinese majority of over 75 per cent) (Snodgrass & Harvard Institute for International Development 1995). Unlike other heterogenous countries, where the dominant group usually wields the most power, Malaysia presents itself as a unique context in this regard—being the ethnic majority, the Malays have always remained politically the most dominant in the country even though economic power had always rested in the hands of the ethnic Chinese, creating a strong impetus for the former to use political power to improve the economic position of the Malays (Ibid 1995). As a result, intra-ethnic disparities and conflicts often color heavily the socio-cultural, economic and political discourses native to Malaysia making it a unique context to study the historical development of gendered discourses.

3. Method & Findings

Drawing on textual and pictorial data from Malaysia’s oldest newspaper still in print — The New Straits Times, this study aims to study the historical shifts in the dominant gendered discourses circulating in the Malaysian press over the period 1959-1973 using a discourse analysis informed by Foucauldian traditions. Associated with poststructuralist thinking (Potter 2008), such discourse analyses tend to extend beyond the conventional, linguistically driven content analyses of texts to include careful analyses of the ways in which the texts themselves have been composed in relation to their social and historical situatedness (Cheek 2004).
In order to conduct the analysis in a more systematic manner, this 15-year-long time span has been divided into two specific time frames reflecting the different development phases Malaysia underwent as a sovereign state following its independence from the British in the year 1957. The first time frame covers the post-independence era spanning from the year 1959 to 1964. Covering the years immediately following this period (1965-1973), the second time frame captures a period in the Malaysian development trajectory where it was striving towards becoming an agriculture-based economy. The development agendas implemented by the Malaysian government have been argued to play an instrumental role in influencing the position of women and conditioning a gender subordination that favours men more so than women at both personal and structural levels (Cheek 1999) making its development trajectory a useful benchmark for studying the historical shifts in the country’s dominant gender belief system.

In the post-independence era and in the period following immediately after, the gendered discourses that dominated the Malaysian press revolved around a gender belief system that rested on the male breadwinner/female homemaker family model as its core. As a result, society’s conceptualization of its ideal woman and man during the time depended for the most part on their distinctive gender roles in the family as homemakers/caregivers and protectors/providers and their ability to live up to the gendered expectations these roles give rise to. Reflecting the supremacy of their roles as wife/mother and homemaker/caregiver in shaping their worth and identity, a woman’s worth in the society at the time depended on how beautiful she was, her aptitude in the domestic sciences (i.e. cooking, sewing, needlework, embroidery, floral arrangement) and on how well she conformed to society’s ideals of femininity at the time. Similarly, men were judged primarily based on their intellect, affluence and congruence with the ideals of masculinity at the time—all traits necessary for them to fulfill their roles as protectors and providers effectively.

Careful analysis of the gendered discourses that dominated the Malaysian press during the post-colonial era hinted at the lingering influence of the Colonial British on the gender ideologies and norms prevalent in the country. The development of colonialism and capitalist economic relations in Malaya initiated gradual changes in the productive conditions of the pre-capitalist society which gave rise to a new type of society where even labor was regarded as a marketable commodity (Kaur 1994). As a result, drastic changes took place in the economic relations that existed between men and women in Malaya as the labor process split into two, relegating commodity production to men and domestic labor to women. This development, considered as the inception of traditional male and female gender roles in Malaya (Kaur 1994; Noor 1999) were further reinforced by religious and cultural value systems that existed during the time. This was markedly different compared to the precolonial era where women in Malaya often worked alongside their spouses in subsistence agriculture (Hirschman 2016; Noor 1999).
As a result, under British sovereignty, a system that segregated the roles of men and women was established throughout Malaya (Kaur 1994; Noor 1999) filtering into the institutional and educational systems of the country. The new education regime that was put into place emphasized the nurturing and domestic roles of women in the society introducing subjects like basic sewing and needlework as part of the curriculum for girls and women. On the other hand, education for boys and men focused on wood and metal work in accordance with the needs of the Malayan labor market at the time (Topimin 2015). This gendered institutionalization of the domestic sciences and industrial/vocational work into the country’s educational curricula remained deeply ingrained into the institutional fabric of the country even after the British had left—particularly evident in the case of domestic sciences. Countless women’s associations and women’s informal groups that operated during the post-independence era continued this legacy by running domestic science classes in the local communities as a means of empowering and improving the status of women in the society (Manderson 1977). Some of the more prominent of these organizations that emerged included the Women’s section for the then ruling party, UMNO, and the Girl Guide Association.

Despite the continuing prevalence of the male breadwinner/female homemaker model, the period immediately following the post-independence era [1965-1973] witnessed women’s roles as secondary earners for their families gain a more equal-footing with their primary roles as homemakers and caregivers. Working women during this period were afforded more visibility unlike before, when they were largely absent from the public eye. Their role and efforts in economically contributing to the well-being of their families became more widely recognized and acknowledged. This newfound publicity, however, did not come without a price—much controversy, speculation and stigma also followed, particularly with regards to married women. Evidence of these discourses were particularly prominent in the pages that were specifically designated for women in the newspapers hinting at the wide-spread prevalence of cognitive dissonance and “mother’s guilt” amongst many of the women. Reverberations of these transitions were evident even in the institutional climate of the country during the time, particularly during the later years of this time frame. Debates on the need for equal employment opportunities, anti-discrimination laws and regulatory bodies to ensure their enforcement surfaced for the first time in the country. Such discourses also hinted at the widespread incidence of gender discrimination and unfair treatment of female employees in the Malaysian labor market although very faint traces of these discourses were visible, at least in the sample that was selected for this study. Wanita UMNO, once again, emerged as a particularly powerful voice and platform leading these discussions in the country. Interestingly, however, a distinct lag in the market responses to these transitionary changes were observed with media representations continuing to depict women as homemakers with barely a handful of exceptions.

Further analysis helped to trace out the origins of these shifts in women’s roles and status in the Malaysian society as more active participants in the formal labor market. The late 1960s and 1970s witnessed landmark industrial restructuring that took place in the United States, Europe and Japan. Due to spiraling labor costs, business corporations in these countries were forced to relocate their labor-intensive production to Asia which had an abundant supply of cheap and docile labor—a phenomenon historically known as the “New International Division of Labor” (Wee 1996). Malaysia’s rapid increase in its female labor force participation rates that was observed during the early 1970s, concentrated particularly in the manufacturing industries; have primarily been attributed to the employment opportunities that were created for women specifically as a result of this New International Division of Labor in conjunction with the export-oriented industrialization programme that was initiated by the Malaysian government during this period (Kaur 1994).
References


Effective fundraising for sustainable support of children in poverty: The influence of child photos on donations in the context of child sponsorship
Hyunkyu Jang, Governors State University, USA

Extended Abstract
The first goal of the United Nation’s Sustainable Development Goals is “No Poverty.” According to a report published by the U.N. (UN General Assembly 2016), eighteen thousand children die each day of poverty-related causes. Many different ways to end poverty have been examined in the macromarketing literature. One stream of research has focused on the behavior of individuals at the subsistence level (Viswanathan et al. 2014), such as on the strategies that low-income individuals choose to cope with their poor conditions (Yurdakul and Atik 2016). Another stream of research has examined negative behaviors of individuals who are not at the subsistence level, such as overconsumption undermining the sustainability of the ecological system (Assadourian 2010). Little research has explored positive behaviors of individuals above the subsistence level, such as philanthropy through charitable donations. Among the few studies that do exist, a recent study by Mittelman and Dow (2018) suggests that Canadian donors would donate less to victims in Pakistan than to victims in Haiti because the greater physical distance between Canada and Pakistan also creates greater psychological distance. The current research aims to go one step further by examining the behavior of potential donors.

Many charities fundraise to end the poverty of children in need. These charities requests for donations typically feature a child in need with a photo of the child to induce empathy in potential donors. These requests sometimes seek one-time donations, sometimes recurring donations. Although recurring donations enable charities to provide more sustainable support for children in poverty than one-time donations (Stein 2016; The State of Modern Philanthropy 2017), research on the effective use of child photos in social marketing has been limited to the context of one-time donations, resulting in lack of support from the academic marketing community for more effective ways to end child poverty. Moreover, prior research has found that children with less attractive appearance or sad facial expressions elicit greater empathy than children with more attractive appearance or happy facial expressions (Baberini et al. 2015; Fisher and Ma 2014; Small and Verrochi 2009), which implies that some children do not receive help through charitable donations based on their attractiveness or facial expressions. The current research attempts to fill the gap by examining the influence of facial expression both in the context both of one-time donations and of child sponsorships: the latter is one of the common fundraising types for recurring donations in children’s charities. The current research suggests that the preference for sad-faced children found in one-time donations in past research is eliminated in child sponsorships. In child sponsorships, donors choose children to sponsor by making recurring monthly donations and periodically receiving photographs and letters from the children. Since child sponsorships are the most beneficial to helping to end child poverty, it is important to know how child images affect sponsorships and understand the underlying mechanism for donor willingness to sponsor a particular child.

Conceptual Background
Prior studies have suggested that people in the one-time donation context prefer to help sad-faced children because they feel greater empathy toward sad-faced children (Baberini et al. 2015; Small and Verrochi 2009). However, those studies have not examined different types of donations, varying effects of empathic concern versus empathic distress (Batson et al. 1981, 1983), or the different forms of empathic distress that can affect those decisions. The present research fills in these gaps.
The present research first proposes that sad facial expressions evoke greater empathic distress than happy facial expressions whereas both facial expressions evoke empathic concern to a similar extent based on the following previous findings. Researchers found that people who saw sad-faced children felt sadder than those who saw happy-faced children (Small and Verrochi 2009) and that empathic distress is associated with negative emotions (Ashar et al. 2017; López-Pérez et al. 2014). In contrast, empathic concern was found to show no consistent emotional valence, but rather the brain regions that predict empathic concern were found to be positively correlated both with sadness and happiness (Ashar et al. 2017). Therefore, people who see sad-faced children experience greater empathic distress than people who see happy-faced children, whereas there is no difference in empathic concern based on facial expressions (H1).

The current research suggests that empathic distress influences donor decisions differently depending on the donation context. More specifically, in one-time donations, it is expected that the greater the empathic distress, the more likely people would be to choose the child who evoked that empathic distress, consistent with the finding in the past research (Ashar et al. 2016, 2017). Therefore, one-time donors will prefer to help sad-faced children over happy-faced children (H2A).

Child sponsors periodically receive photos of the sponsored children and correspond with the children. This correspondence feature repeatedly exposes sponsors to possible future long-term empathic distress. The motivation to reduce the distress that a potential donor may experience when viewing photos of children may lead people to choose to benefit the child who most evoked that experienced empathic distress, whereas the motivation to minimize the distress a potential donor may anticipate when considering long-term future interaction with a child may lead people to choose the child who evokes the least anticipatory empathic distress. In sponsorships, which involve both choosing a child to benefit with donations and choosing a child with whom future contact will occur through photos and letters, the two motivations would cancel each other out so that empathic distress would seem to not influence donor choices of children. Therefore, sponsors will show no preference between sad-faced children and happy-faced children (H2B).

**Studies**

Two experimental studies were conducted. Study 1 with a 2 (facial expression: happy and sad) between-subjects design showed that sad-faced children evoke greater empathic distress (p < .0001), but not greater empathic concern than happy-faced children (p = ns), supporting H1. Study 2 with a 2 (one-time donation and child sponsorship) between-subjects design showed that more people chose sad-faced children than happy-faced children in one-time donations (p < .05), supporting H2A. In contrast, in child sponsorships, participants chose happy-faced children as often as they chose sad-faced children (p = ns), supporting H2B. Study 3 with a 2 (one-time donation, child sponsorship) between-subjects design showed that in one-time donations, the greater the empathic distress, the more likely people would be to choose children who evoked greater empathic distress, sad-faced children, than children who evoked less empathic distress, happy-faced children (p < .0001), whereas in the sponsorship condition, empathic distress does not influence the likelihood of choosing a particular child (p = ns), which explains the underlying mechanism behind the choice of child.

**Conclusion**

Little research has examined donor behavior in the context of child sponsorship, although child sponsorships are a primary avenue to help children’s charities secure recurring donors. The current research confirms that potential donors make decisions differently due to the
correspondence feature of child sponsorship, compared to how they make their decisions in one-time donations. The current research demonstrates that potential donors do not show the preference for sad-faced children found in the past research conducted in the context of one-time donations, but rather people choose happy-faced children as often as they choose sad-faced children.

References


Introduction

Social enterprises, which combine market logics with philanthropy, are playing a critical role in filling gaps in agricultural value chains by providing marginalized producers access to affordable financial products, technology, market data and market linkages (Tinsley and Agapitova 2018).

Our research focuses on how social enterprises, especially in an agricultural, BoP context, engage in marketing activities that are distinct from the more conventional marketing tools adopted by larger firms. Resource-constrained social enterprises pursue creative and unplanned entrepreneurial marketing tactics and tap markets through personal networks (Morris, Schindehutte and Laforge 2002). We develop an entrepreneurial marketing model for the social enterprise, Hand in Hand (HiH), which works with rice value chain actors in the BoP markets of southern India. Our research question is:

1) How can entrepreneurial marketing enable social enterprises and BoP value chain actors to cope with market voids?

Literature review

We draw upon the extant literature on entrepreneurial marketing and BoP markets to identify the following themes that would inform our case research design. Shaw (2004) brought to light networking strategies, which enable social enterprises to recognize the requirements of local and niche markets. This provides the basis for us to explore further how social entrepreneurs leverage relationships while pursuing entrepreneurial marketing activities in agricultural, BoP markets.

Risk management is considered an integral part of entrepreneurial marketing, especially in agriculture in BoP markets, where micro-entrepreneurs have to overcome multiple institutional voids due to lack of access to credit or markets. Thus far, there is limited entrepreneurial marketing scholarship on institutional transformation in BoP markets.

We make the case for an expansive view of value creation in entrepreneurial marketing. Perceived ecological value can strongly influence consumer behavior (Koller, Floh and Zauner 2011). Social entrepreneurship scholars such as Weerawardena and Mort (2006) describe how social value can be generated through the exploitation of perceived opportunities. Here, we bring to light how social enterprises differentiate agricultural commodities through economic, environmental and social value creation.

Macro-marketing scholars such as Laczniak and Murphy (2010) have urged marketers to go beyond customers’ needs and focus on external stakeholders and we delve deeper into how multiple stakeholders’ concerns can be addressed by developing an inclusive agricultural value chain. BoP and development economics literature reveal how capacity building by social enterprises can empower small-scale producers and micro-entrepreneurs (Ramachandran, Pant and Pani 2018 and Ansari, Munir and Gregg 2012). We argue that social enterprises can empower disenfranchised producers/micro-entrepreneurs to pro-actively recognize opportunities in BoP markets.
Research design and methodology

The case study setting was the rice value chain project launched by the social enterprise HiH, which specialized in microfinance, micro-enterprise training and capacity building across a range of sectors. Drawing upon Porter’s (1980) work, we define a rice value chain as a collection of activities performed by farmers, millers, wholesalers and retailers affiliated with HiH to transform paddy into rice and add value to the product for the final customer.

Findings

We summarize the key insights derived from value chain actors based on the five themes of our entrepreneurial marketing model:

<table>
<thead>
<tr>
<th>Theme</th>
<th>Insights from value chain actors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building trusting relationships (Shaw 2014)</td>
<td>- HiH formed trusting relationships between different value chain actors which helped them overcome their dependence on middlemen as well as information asymmetry problems.</td>
</tr>
<tr>
<td>Institutional transformation (Prabhu, Hassan and Tracy 2017)</td>
<td>- HiH established new institutions to foster trust and social capital formation across the value chain.</td>
</tr>
<tr>
<td>Differentiation through monetary and non-monetary value creation (Thomas et al 2013) (Koller, Floh and Zauner 2011)</td>
<td>- HiH enhanced social, environmental and monetary value creation across the rice value chain.</td>
</tr>
<tr>
<td>Stakeholder orientation (Laczniak and Murphy 2010)</td>
<td>- HiH galvanized support for its rice value chain initiatives through donors, the government corporate partners. - HiH also considered SHG members as important consumers of its rice products.</td>
</tr>
<tr>
<td>Empowerment of value chain actors (Ramachandran et al. 2018) (Ansari et al. 2012)</td>
<td>- Multiple BoP value chain actors were empowered as a result of HiH’s intervention. These value chain actors gained better business management skills through capacity building.</td>
</tr>
</tbody>
</table>

Table 1: Entrepreneurial marketing for HiH

Implications

Marketing academics can build on our work to further link the extant entrepreneurial marketing literature with diverse BoP contexts. Our entrepreneurial marketing model can enable food marketers, social enterprises and BoP producers to explore new narratives of social and
environmental value creation for agricultural commodities. An important implication for food marketers is that SHG networks can serve as platforms to market agricultural produce and also bring together BoP producers and consumers. This would not only help address food insecurity problems, but also help promote environmentally and socially sustainable food supply chains.

References


Financial exclusion, vulnerability and coping strategies – the transformative role of banks

Dr. Sohail Kamran, Jyvaskyla University, School of Business and Economics, Finland
Dr. Pia Polsa, Hanken School of Economics, Helsinki, Finland
Professor Outi Uusitalo, Jyväskyla University, School of Business and Economics, of Jyväskylä, Finland

Abstract
Financial exclusion is recognized as an important element of socio-economic inequality where economically vulnerable groups are excluded from basic financial services. One form of financial exclusion is unbanked consumers. While research had covered consumer vulnerability in the context of disability, health and age, low-income unbanked consumers have attracted less attention. Thus, research on financial exclusion, consumer vulnerability following exclusion, and coping strategies employed by vulnerable consumers is warranted. This study integrates the fields of exclusion, vulnerability and coping. To study these connections, we use data gathered from unbanked consumers through semi-structured in-depth interviews. We extend theory by showing how various types of exclusion lead to different forms of vulnerability (external/internal and actual/perceived). These various forms of vulnerability, in turn, source different kind ways of coping with the difficult and stressful situations and issues. By understanding the dynamics of financial exclusion, vulnerability and coping we identify services and encounters where banks can act as transformative service providers for low-income vulnerable consumers.

Keywords: Financial Exclusion, Unbanked, Vulnerability, Coping Strategies, Banks.

Consumer researchers have given significant attention to investigating vulnerable consumers and their experiences of vulnerability in a marketplace (e.g. Visconti, 2016; Baker et al., 2005; Smith & Cooper-Martin, 1997). Previous vulnerability research in services field has covered disability, age, sexual orientation, health, remote places, exploitation, immigrant status, language, to name few (Rosenbaum, Seger-Guttmann & Giraldo, 2017). One cause of consumer vulnerability is exclusion from basic services. Firms’ discrimination against certain consumer groups has been regarded as a major cause of consumers’ exclusion from basic consumption domains, which turns them vulnerable in the marketplace (Wang & Tian, 2014). Low-income consumers form a group at risk to become excluded and end up becoming vulnerable. One basic consumption domain from which they are commonly excluded is banking services.

A basic bank account remains out of reach for many individuals in developing countries. According to one estimate, more than one-third of the world population do not own a basic bank account (Demirgüç-Kunt & Klapper, 2012), and the majority of those reside in the developing world (Demirguc-Kunt et al., 2015; Demirgüç-Kunt & Klapper, 2012; Honohan, 2008). The previous literature has investigated how unbanked consumers experience vulnerability in form of financial exclusion (Kamran and Uusitalo, 2016) and how they use various coping strategies (Kamran & Uusitalo, 2016; Kamran, 2017). While there are various drivers of exclusion and vulnerability, it is still unclear how various types of financial exclusion (i.e. caused by consumers themselves or caused by banks’ policies) connect to different forms of vulnerability, and which coping strategies are employed in different conditions. Hence, this paper investigates these conceptual connections in order to understand the ways in which low-income unbanked consumers become excluded, how they experience marketplace vulnerability.
in their routine lives and how they engage in different coping strategies in different vulnerability conditions.

**Consumer Exclusion**

Financial exclusion means that certain consumer groups, such as unbanked are prevented from utilising financial services that are necessary in people’s everyday lives. Different types of exclusion described by Kempson and Whitley (1999) are presented in Table 1.

**TABLE 1. Summary of different ways of financial exclusion**

<table>
<thead>
<tr>
<th>Access</th>
<th>When consumers are restricted from accessing financial services through the process of risk assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Condition</td>
<td>When a financial product becomes unsuitable for the needs of some consumers due to the provisions attached to it, such as bank charges</td>
</tr>
<tr>
<td>Price</td>
<td>Where some financial services are too expensive for consumers to afford</td>
</tr>
<tr>
<td>Marketing</td>
<td>Whereby financial service providers deliberately exclude some consumer groups from target marketing and selling activities</td>
</tr>
<tr>
<td>Self-exclusion</td>
<td>Where people believe that there is no use applying for a financial service because their application will be rejected. Consumers may opt to exclude themselves from basic financial services either due to their personal negative experiences or after knowing of the adverse experiences of others in their social circle</td>
</tr>
</tbody>
</table>

**Consumer vulnerability**

The literature lacks an unanimous definition of consumer vulnerability. Nevertheless, vulnerability generally connotes consumer harm or detriment (Ståsett, 2007; Baker et al., 2005; Smith & Cooper-Martin, 1997), which can be of an economic, physical or psychological nature (Smith & Cooper-Martin, 1997). Baker et al. (2005) delineate consumer vulnerability as a condition of marketplace powerlessness that occurs from inequities in marketplace interactions.

Consumer vulnerability can be characterised by presenting different types of vulnerability. First, consumer vulnerability is a consequence of internal and external factors. Accordingly, on the one hand individual circumstances such as poverty or illiteracy (Smith & Cooper-Martin, 1997; Ringold, 1995; Morgan, Schuler, & Stoltman, 1995), and on the other hand external conditions, for example stigmatisation and discrimination in the marketplace, contribute to consumers’ experiences of vulnerability (Visconti, 2016; Baker et al., 2005).

Second, vulnerability can be perceived or actual type of vulnerability (Smith & Cooper-Martin, 1997). Perceived vulnerability arises when other people believe that a person is vulnerable although the person in question either does not feel susceptible or is unwilling to admit her/his experience of vulnerability. On the contrary, when individuals recognise their own state and experience the detriment, it is about actual vulnerability. Table 2 shows a matrix of four types of vulnerability based on the above mentioned dimensions.
TABLE 2. Internal, external, perceived and actual vulnerability

<table>
<thead>
<tr>
<th>Vulnerability</th>
<th>Actual</th>
<th>Perceived</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>External</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Market place discrimination and repression</td>
<td>Inequalities</td>
<td></td>
</tr>
<tr>
<td>Stigmatization</td>
<td></td>
<td>Social perceptions of self</td>
</tr>
<tr>
<td>Natural catastrophes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barriers to participate in society</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distribution of resources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical element</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Logistical elements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Economic, social and political upheaval or violence</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Internal</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poverty</td>
<td></td>
<td>Lack of control</td>
</tr>
<tr>
<td>Illiteracy</td>
<td></td>
<td>Individual perceptions of self</td>
</tr>
<tr>
<td>Dependability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Homelessness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical appearance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Coping strategies
Consumers experiencing marketplace vulnerability usually employ different coping strategies to deal with the problematic situations and to mitigate their experiences of vulnerability (Hamilton & Catterall, 2008; 2007; Baker et al., 2005). A accepted definition is provided by Lazarus and Folkman who define coping as ‘constantly changing cognitive and behavioural efforts to manage specific external or internal demands that are appraised as taxing or exceeding the resources of the person’ (Lazarus & Folkman, 1984, p. 141). Financial exclusion represents a challenge for low-income unbanked consumers and they are continuously compelled to utilise different coping strategies to take control of their routine financial affairs such as transferring money, saving money and obtaining short-term loans (Kamran & Uusitalo, 2016b). Table 3 takes up both emotional and behavioural coping strategies.

TABLE 3. Summary of coping strategies

<table>
<thead>
<tr>
<th>Coping strategies</th>
<th>Emotional</th>
<th>Behavioral</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distancing</td>
<td></td>
<td>Controlling potentially harmful behaviours</td>
</tr>
<tr>
<td>Fantacy</td>
<td></td>
<td>Shedding one’s own reminders of an experience</td>
</tr>
<tr>
<td>Emotional regulation</td>
<td></td>
<td>Seeking social support</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Engaging in deception</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Using social ties and community resources</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Informal channels</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mobile money</td>
</tr>
</tbody>
</table>
Consumer exclusion, vulnerability and coping strategies

The conceptual framework and background for our empirical study is displayed in Figure 1. We assume that different ways how consumers become financially excluded are connected to different forms of vulnerability; and consumers’ coping strategies, in turn, evolve in accordance with how consumers experience vulnerability. Thus, our analysis aims at uncovering the possibilities of consumers to occupy different forms of coping. For example, are there forms of vulnerability that are difficult to cope with, and are other vulnerability forms where coping can be straightforward.

**FIGURE 1, Linkages between financial exclusion, form of vulnerability and different coping strategies**
Method and data

Semi-structured interview data were gathered from 28 low-income unbanked consumers in the twin cities of Rawalpindi and Islamabad, Pakistan. Data was coded with the logic of thematic analysis (Braun & Clarke, 2006) and categorised by the conceptual framework of the study (DeCuir-Gunby, Marshall, & McCulloch, 2011).

Results

The interview participants were unbanked, i.e. excluded from banking services. They had different backgrounds in terms of exclusion: price exclusion, marketing exclusion, self exclusion. The expensive bank services and lack of access to banks were regarded as discriminatory policies. Their financial exclusion lead to various forms of vulnerability, see Table 4.

<table>
<thead>
<tr>
<th>Factors</th>
<th>Actual</th>
<th>Perceived</th>
</tr>
</thead>
<tbody>
<tr>
<td>External</td>
<td>Unbanked consumers are encountering negative consequences due to external factors:</td>
<td>Possibility to observe that unbanked consumers are encountering harm and detriment due to bank policies:</td>
</tr>
<tr>
<td></td>
<td>Personal: robbery, banks procedures waste time</td>
<td>Financial service providers discriminate against low-income consumers</td>
</tr>
<tr>
<td></td>
<td>Economic: high costs, difficult to save money</td>
<td>Low-income and illiterate consumers are vulnerable due to stigmatisation and discrimination</td>
</tr>
<tr>
<td></td>
<td>Social: difficulties in paying back loan and obligation of loan to relatives</td>
<td></td>
</tr>
<tr>
<td>Internal</td>
<td>Unbanked consumers are encountering negative consequences due to poverty and lack of literacy skills:</td>
<td>Possibility to observe internal factors of consumers who are susceptible to vulnerability:</td>
</tr>
<tr>
<td></td>
<td>Personal: illiteracy hinders understanding</td>
<td>Recognising potential vulnerability by poverty and illiteracy</td>
</tr>
<tr>
<td></td>
<td>Economic: lack of self-discipline to save</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Social: embarrassment</td>
<td></td>
</tr>
</tbody>
</table>

Table 4. Vulnerability of financial exclusion(Kamran and Uusitalo, 2016)

Studying low-income unbanked consumers revealed that for them, financial exclusion is a multifaceted issue. Many participants simultaneously faced several ways of financial exclusion. Access exclusion is connected with banks’ policies to classify customers according to profitability. Low-income consumers are prone to perceive access exclusion and discrimination. Condition exclusion was encountered when participants had difficulties in opening a bank account due to documentation or initial deposit requirements. Price exclusion was visible in data when some participants considered that opening a bank account is too expensive option. Likewise, formal money transfer facility SMS rates were often considered high by low-income participants. The participants had very little knowledge of bank account opening procedure and benefits of bank accounts. Marketing exclusion occurs because the banks generally do not market their products to low-income consumers. Some participants decided themselves not to open a bank account due to their religious beliefs or their own
experience of poverty. In these cases self-exclusion from financial services caused vulnerability.

In the absence of a formal bank account, unbanked participants utilised various workable coping strategies to satisfy their basic financial needs. Some of these coping strategies were emotional linked to their internal vulnerability and some were behavioural (Kamran and Uusitalo, 2016). Financial exclusion led to dependence on social networks to transfer money, get access to short-term loan and being able to save while market resources other than banks provides possibility to transfer money and get loan (ibid). Figure 2 illustrates the linkages between ways of financial exclusion such as lack of access, high prices, unsuitable services, and self-exclusion. Our data shows how perceived vulnerability leads to self-exclusion while the way banks operate produce actual vulnerability in form of payment problems, robbery, and so on (see Figure 1).

Behavioural coping strategies are ways to deal with actual vulnerability while whereas emotional and personal resources are linked to perceived vulnerability. By showing how actual vulnerability trigger behavioural coping strategies and perceived vulnerability produces rather emotional and personal coping strategies service provides alike can better design actions to transform vulnerability to financial inclusion. Banks can change their services to address the issues needed by vulnerable customers like services for illiterate consumers and suitable pricing. When it comes to perceived vulnerability programs to empower and emancipate are rather needed. These programmes may not fit the commercial banks’ missions and thus government and NGO training programs should be set up to provide education on financial literacy.

![Figure 2 Financial exclusion, vulnerability and coping strategies](image-url)
Implications

This paper addresses financial exclusion, vulnerability and coping strategies of low-income consumers in a developing country. The study shows that poor people can be unbanked owing to both their personal circumstances and external conditions. In order to mitigate vulnerability encountered by low income unbanked consumers, it is necessary to consider improving both external and internal factors. External factors can be influenced by enhancing access of basic financial services, and removing barriers when designing bank services. For example, opening more banks branches is warranted in villages in which large parts of population live. Moreover, reconsidering charges from services such as SMS money transfer would lessen the financial harm to low-income consumers. Coping with vulnerability due to exclusion may lead to adverse consequences, such as threats from using informal lenders, social problems when keeping money at home etc. SMS money transfer is an example of service targeted to low-income consumers, thus there is a ground to expect that the price of the service should be affordable. Internal vulnerability which refers for example to education, could be mitigated by educating the unbanked. Coping with vulnerability can be enhanced for example by informing low-income consumers about possibilities to save money through mobile money services and utilizing mobile money services for various purposes e.g. bills payment and money transfer. Low-income consumers encounter powerlessness and stress when using behavioral coping strategies, e.g. obtaining and utilizing loan from various informal resources. Enhancing the access of unserved and underserved to the products and services of formal banks and microfinance institutions is the most important way of transformative service effort by organisations. If, however, this is not possible the last chance of decreasing the harms of coping strategies to inform low-income consumers about banks'offerings and reminding of the adverse consequences of taking loans from informal moneylenders.

References:


Laudato si’ – A Macromarketing Manifesto?

Thomas A. Klein, University of Toledo (Professor Emeritus)
Gene R. Laczniak, Marquette University (Professor Emeritus)

Abstract

This paper explains that Pope Francis’ 2015 encyclical on climate change and the environment, Laudato si’ (“Praise be to you, my Lord”) or LS for short, provides a compelling and multifaceted framework for assessing the interaction among marketing, markets, and society, i.e., macromarketing. Stated more explicitly, this document provides religion inspired norms for market conditions, actions, and performance that reflect both (a) the social teachings of the Roman Catholic Church as they have evolved over the past century and a quarter, and (b) the foundational predicate of micromarketing scholarship, the recognition of marketing systems as the primary mechanism for provisioning goods and services in contemporary society. The intent here is to harmonize two perspectives (ethical vs. economic), often seen as conflicting and mutually exclusive. Such situations are too often viewed as a defining choice between "social values and norms" and "economic incentives and circumstances" – a dichotomy that is neither optimal nor practical. Rather, we recognize that key themes in Laudato si’(LS) - environmental sustainability, concern for justice with respect to vulnerable peoples and a "common good" orientation capable of looking beyond economic advantage - also correspond to issues addressed by macromarketing scholars for nearly forty years since that sub-discipline emerged.

This commentary concerning Pope Francis’ encyclical on environmental stewardship begins with a brief background on Abrahamic religions and Catholic Social Thought (CST), summarizes the key points of LS, and reflects on its connection to issues examined in macromarketing scholarship.

Next, important benchmarks of macromarketing scholarship that reflect key criteria for market system performance – efficiency, innovation, satisfaction, participant equity, ecological protection, and effective regulation – are brought to bear.

We follow with a summary discussion of how these perspectives are capable of cross fertilization, are inherently consistent with one another, and, together provide the more “authentic anthropology” that is the ultimate objective of LS.

Given recent political events in the US, we conclude with a brief post script regarding policy implications. The article, in addition to customary references, includes an extensive appended topically categorized bibliography that showcases macromarketing scholarship contributing to specific issues addressed in LS.

Introduction

This commentary examines the Roman Catholic Pope Francis’ 2015 encyclical, Laudato si’ (subtitled, "On Care for Our Common Home"), comparing it to the issues and norms represented in macromarketing scholarship. Thus, this analysis of LS examines relationships among marketing, markets, and society, and not simply the managerial implications of LS.

The most publicized arguments of LS demand environmental stewardship and recognizing it as a matter of distributive justice. LS challenges market capitalism to adjust policies and practices that adversely impact environmental sustainability. Francis argues that environmental degradation – pollution and resource depletion – are influenced by human activity that adversely and disproportionately affects the poorest nations and the poorest people.
in wealthy nations while threatening the health and survival of all. Francis further argues that sometimes markets foster unbridled consumption and resource exploitation, threatening the very sustainability of human life. In response, business scholars might well ask: Is LS a valid criticism of market capitalism? What are the ingredients of an economic system that would address that concern? How do the themes of LS square with concerns of macromarketing scholarship?

To quickly answer the last question first (elaborating later), these perspectives echo those of macromarketing scholars since that subdiscipline emerged (circa 1975) in an effort to differentiate its scholarship from that devoted to managerial marketing. Instead, macromarketing conceives of marketing activities and institutions as aggregated and intersecting systematically, i.e., both influenced by and influencing the concerns of society. A question raised as a by-product of our analysis is whether LS provides a worthy framework for assessing the interaction of marketing, markets, and society.

In reply, we argue that LS provides religious themed norms and values that should influence secular as well as ecclesiastical discussions of “… great social themes of economics, politics, war, well-being, social inequality, and human development (Berry 1999; Repiso, Ahedo, and Montero 2018).” LS offers a path that blends ethical precepts with market-oriented economic analysis. This path also offers a longer-term systems perspective, which runs counter to the shareholder theory implicitly accepted in many contemporary corporations (Smith 2003). It also may reflect one manifestation of Lee’s (2018) call for a theory of the firm with "a greater moral dimension."

This examination proceeds in order to consider:

(1) The theological framework provided by Catholic Social Teaching (CST), particularly as it has evolved since the publication of Pope Leo XIII’s 1891 encyclical Rerum Novarum ("Of new things") on the rights and duties of capital and labor. It also comments briefly on more recent documents that spell out a more extensive range of social concerns and principles, especially CST’s justice perspective;

(2) The specific themes advanced in Laudato si', the most recent of the papal encyclicals devoted to these concerns;

(3) A review of themes covered in LS as they have been studied in the macromarketing literature;

(4) A discussion of how these literatures (CST and macromarketing) are in parallel and provide an opportunity for cross-fertilization and, finally,

(5) Some reflections on concerns that have emerged in recent months in the wake of political developments around the globe, but particularly in the United States.

Catholic Social Teaching (CST): A Brief Synopsis

Contemporary CST originated response to injustices recognized in 19th Century labor-management relations (Pope Leo XIII 1891). CST reflects scripture-based precepts advanced by all Abrahamic religious traditions - Moslem and Jewish as well as Christian sects (see Caux Round Table 2010, pp. 9-10, and Klein, Laczniak, and Santos 2017, p. 105). These social commentaries have been further developed through church documents over the past century (Pope Pius XI 1931; Pope John XXIII 1963; Pope John Paul II 1981 and 1987; U.S. Catholic Bishops 1986; Compendium 2005; Pope Benedict XVI 2009; Turkson and Toso 2014; Ladaria et al. 2018; Congregation of the Doctrine of the Faith 2018)), as well as the current document LS (2015). Collectively, these materials provide the primary framework for the analysis and conclusions presented here. This, of course, reflects a larger thesis that supposes religion-based moral norms can be applied productively to many contemporary social problems. (For another
example, consider the issue of religious nationalism challenging peaceful relations around the
globe (Poruthyil 2017)). Assuming the validity of applying religiously grounded ethical
principles to commercial endeavors, the result is a comprehensive catalog of socio-economic
principles, most recently summarized for macromarketers in Dann and Dann (2016, pp. 413-14)): human dignity, common good, preference for vulnerable populations, solidarity, 
environmental stewardship, subsidiarity, and worker rights.

As modern technology and economic processes have exploited (and thereby stressed) the
earth's natural environment in terms of pollution and resource depletion, the moral implications
for production, distribution, and consumption have become a focus of great public debate. As
moral debates invite religious participation, the Roman Catholic Church added environmental
stewardship to its list of social principles (Compendium, 2005). Since then, Benedict’s
Caritatis in Veritate ("Charity in Truth") called attention to the important implications of
environmental concerns for economically disadvantaged nations (notably, but not exclusively,
in Latin America, Africa, and Asia). However, Pope Francis’ Laudato si’ (2015) is the first
papal encyclical with a primary focus on protecting the physical environment.

**Laudato si’ (LS): Its Essentials**

This encyclical letter by Pope Francis was published in June of 2015. Its title, “Laudato si’”
("Praise to you") - words taken from the first sentence of the document - quotes the opening
lines of a prayer by St Francis of Assisi that exalts the bounty of the earth. The papal letter is
sub-titled, “On care for our common home” and was eagerly anticipated by many (Zaroya
2015).

In profile, the document is a hefty 184 pages (in English), over 40,000 words, and consists of
246 paragraphs. The science-informed letter - the Vatican consulted multiple climate
researchers (Naik 2015) - condemns global environmental degradation and calls for a new
philosophy of stewardship over earth’s resources, based on the common good [156]. (Because
papal encyclicals are translated into many different languages, by custom, quotations from the
manuscript are referenced by paragraph number, which remains consistent across all versions.
Our paper follows this protocol.)

The most quoted sentence from LS, which captures the passion and urgency of the encyclical
letter, comes from paragraph [21]: “The earth, our home, is beginning to look more and more
like an immense pile of filth.” LS rebukes climate change deniers and calls into question all
those who ignore environmental issues, sacrifice ecological harm for economic gain, or assume
that improved technology will effectively address environmental ills (Rocca 2015). Such
themes have been previously elaborated in CST, as discussed above, particularly reflecting
several key principles: stewardship, common good, the preferential option for the poor and
vulnerable, and solidarity.

LS might be characterized as carefully developing one overarching motif, but it regularly
connects with two other very important sub-themes. The central message, which channels
scientific studies about global warming and environmental damage (Naik 2015), calls for an
“integral ecology [10-11]” and improved “ecological education [202-14]” that will protest the
status quo and restore planet earth. The two sub-themes that regularly resound in LS are that
(a) environmental exploitation most disadvantages the poorest of earth’s residents [145-9] and,
(b) the globalized capitalistic system of unfettered markets, driven by a “technological
paradigm” and its pursuit of economic growth (employment and GDP), is responsible for a
great deal of environmental spoil [106-10]. It should not be surprising that Laudato si is both
celebrated and controversial, often depending upon the political beliefs of the reader
Integral ecology. Given the LS sub-title, “On care for our common home,” and the anticipation of Church commentary about the physical environment, the document’s central focus on issues relating to the ecology of planet earth is not surprising. The main doctrinal matters of religious significance in Laudato si are taken up most expansively at paragraphs 66-68 and 116-119. Here the “inadequate presentation of Christian anthropology” [116] is addressed, with LS noting that the oft-quoted Biblical passage from Genesis (1:28), giving mankind “dominion” of the world, must be reinterpreted. Human dominion “should be understood more properly in the sense of responsible stewardship” [116] because everything should be seen as connected. At [68], LS notes, “Although it is true that we Christians have at times incorrectly interpreted the Scriptures, nowadays we must forcefully reject the notion that our being created in God’s image and given dominion over the earth justifies absolute domination over other creatures.” Further added at [68], “Clearly the Bible has no place for a tyrannical anthropocentrism for other creatures.” Perhaps the most succinct statement of Laudato si’s global message comes at [95]: “The natural environment is a collective good, the patrimony of all humanity and the responsibility of everyone.”

The specific policy recommendations about environmental responsibility sprinkled throughout LS are to be seen within the context of an “integral ecology” [137] - where everything is closely interrelated. LS counsels, “When we speak of the ‘environment,’ what we really mean is the relationship existing between nature and the society which lives in it. Nature cannot be regarded as something separate from ourselves or as a mere setting in which we live [139].” This said, it should also be noted that LS explicitly rejects the radical ecology that humankind has no special standing in the world different from any other species; instead, “Christian thought sees human beings as possessing a particular dignity above other creatures; it thus inculcates esteem for each person and respect for others [119].”

Global inequality. Consistent with a major principle of Catholic Social Thought advocating a ‘preferential option for the poor,’ an explicit sub-theme found throughout LS, is the connection between environmental exploitation and its disproportionate impact upon the poor. (More generally, it seems notable that this LS position echoes a decades-old argument that global trade contributes to inequality both between and within nations (Stolper and Samuelson 1941) and confirmed in recent economic studies that also call for policy adjustments at national and international levels (Dhingra 2018). At [48], LS observes: “In fact, the deterioration of the environment and of society affects the most vulnerable people on the planet: ‘Both everyday experience and scientific research show that the gravest effects of all attacks on the environment are suffered by the poorest (Bolivian Bishops Conference 2012).’” Noted here [48] are detrimental outcomes such as the loss of fishing reserves, water pollution, and the rise of sea levels that affect impoverished coastal populations particularly in poor countries. Other concerns encountered within Laudato si that underscore a disfavor upon the poorest include the privatization of resources [93], over-consumption by rich economies [95], the loss of jobs to automation [128], displacement of indigenous communities [146], the deficiency of decent, affordable housing in mega-cities [148], health effects resulting from pollution [175], and a lack of political leverage by the poor [189]. LS warns of empty “green rhetoric” and counsels that “…a true ecological approach always becomes a social approach: it must integrate questions of justice in debates about the environment, so as to hear both the cry of the earth and the cry of the poor [49].”

Flawed technocratic paradigms. A discernible yet less evident (as the critique is not concentrated in any particular section of the letter) sub-theme of LS is unease with the
economic and technological system that has contributed to so much environmental exploitation and degradation. While sympathy to global environmental issues as well as the plight of the poor is predictable, a critical appraisal of the current system — the prevailing political/economic ethos — that may have engendered many of these problems, may be less welcome (as recognized below). Proposed causes of the current environmental dysfunction, enumerated immediately below, are embedded throughout the Laudato si’ narrative; they constitute a major indictment of the existing market system, and beg for corrective attention. The criticism of the current capitalistic system, often in the quoted language of LS, now follows:

1. Short term perspectives. “The earth’s resources are being plundered because of short-sighted approaches to the economy, commerce and production [32];” and “A politics concerned with immediate results, supported by consumer sectors of the population, is driven to produce short-term growth. In response to electoral interests, governments are reluctant to upset the public with measures that could affect the level of consumption or create risks for foreign investment [178].”

2. Over-consumption. “…human beings frequently seem to see no other meaning in their natural environment than what serves for immediate use and consumption [5];” and “…the accumulation of constant novelties exalts a superficiality which pulls us [people] in one [‘escapist’] direction [113].”

3. The deified unfettered market. “Many people will deny doing anything wrong because distractions constantly dull our consciousness of just how limited and finite our world really is. As a result, whatever is fragile, like the environment, is defenseless before the interests of a deified market which becomes the only rule [56];” and “It is also the mindset of those who say: Let us allow the invisible forces of the market to regulate the economy and consider their impact on the society as collateral damage [123].” This criticism of unregulated markets is echoed most recently in Laderia et al. (2018). Along with the political expediency noted previously, it recognizes the limits of current corporate and national economic governance structures and, thus, the need to incorporate principles of solidarity and common good into economic politics [194-197]. That concern provides the platform for alternative models, e.g., proposed by Cremers (2017) and Schellnhuber (2018).

4. A growth imperative. A one-dimensional paradigm “…has made it easy to accept the idea of infinite or unlimited growth, which proves so attractive to economists, financiers, and experts in technology. It is based on the lie that there is an infinite supply of earth’s goods… [106].”

5. Technological mania. “The technological paradigm has become so dominant that it would be difficult to do without its resources and even more to utilize them without being dominated by their internal logic. It has become counter-cultural to choose a lifestyle whose goals are even partly independent of technology… [108];” and “The technocratic paradigm also tends to dominate economic and political life. The economy accepts every advance in technology with a view to profit, without concern for its potentially negative impact on human beings [109].”

6. Profit maximization. “Is it realistic to hope that those who are obsessed with maximizing profit will stop to reflect on the environmental damage which they will leave behind for future generations? Where profits alone count, there can be no thinking about the rhythms of nature, its phases of decay and regeneration or the complexity of ecosystems which may be gravelly upset by human intervention [190];” and “The principle of the maximization of profits, frequently, isolated from other considerations, reflects a misunderstanding of the very concept of the economy [195].”
These six major criticisms, proposed as sources of ecological dysfunction, constitute a devastating critique of most of the world’s political, technological, and economic systems. Considered altogether, they raise the obvious question: Can the existing market-focused system, so central to so many Western democracies, be better modified or constrained to create a more sustainable, more environmentally friendly, and more socially conscious form of capitalism? Parsing the answer to this meta-question involves examining what the proper relationship ought to be among marketing (the driver of provision and consumption), markets (allocating these decisions), and society. Especially important here is the concept of ‘the common good’; it harmonizes the encyclical’s vision of seeking the positive characteristics of market-based economies, along with exploring alternative market adjustments - arguably a critical objective of the macromarketing project.

Criticism and commentary on LS. It is proper to note that Francis’ analysis and proposed correctives have prompted critical reviews in some quarters. For example, Gregg (2015) argues that the encyclical misunderstands the economic causes of pollution and the flow of natural resources from poor to rich countries. Rocca (2015) echoes Gregg and concludes his detailed review of the encyclical by noting that the elimination of fossil fuels is unrealistic, while the cleaner use of those fuels is a more practical approach to the pollution they cause. On the other hand, Reese (2015) agrees with Francis’ political diagnosis but offers a more tempered reading of the evils of technology. Reno (2015) notes that the encyclical stops short of proposing any more radical re-engineering of the politico-economic system that would be based on “…the nature of the human person, his proper ends, or natural law (p. 4).” Moreover, the United Nations Global Compact organization (Kell, Kingo, and Reynolds 2015) responded quite positively to the encyclical, recognizing that the private sector should and can “do more to protect the environment and address climate change,” and that Laudato si’ should be an inspiration to that effect (p. 1). Focusing on the environmental challenges facing business enterprise, one must note that the December 2016 issue of the Journal of Corporate Citizenship (Williams et al. 2016) is devoted to engaging Laudato si’ as a framework for considering the role of the United Nations Global Compact - an institutional mechanism for advancing sustainable development. Rousseau (2017) takes that objective further, integrating CST into a theory of the firm.

Between these contrasting perspectives as ‘critical bookends’ are a range of contributions that expand on Laudato si. For example, Green (2015) points out the importance of LS for those interested in (global) catastrophic and existential risks. Spina (2015) also applies Francis’ thinking to the topic of risk regulation. Austriaco considers the encyclical’s understanding of bioethics as a clear reflection of moral law. Deane-Drummond (2015) proposes that LS registers nature as a “gift of god to humanity”, to be treated accordingly (p. 49). In addressing the Centesimus Annus Pro Pontifice Foundation in 2017, Pope Francis positioned the message of Laudato si’ on poverty as more than an environmental issue (Pope Francis 2017). Extending that theme, Bacik (2018) incorporates LS into a more general review of Pope Francis’ abiding concern for the poor (p. 3).

In response to these diverse perspectives, we propose that there exists a ‘common body of knowledge’ dedicated to addressing, albeit imperfectly, the conflicting views regarding whether LS provides a notable framework for studying the interaction of marketing, markets, and society. The discipline arguably best able to pursue this line of inquiry is Macromarketing.

Macromarketing thought – Responding to dominant managerialism

While early marketing scholarship was primarily devoted to the description and quantification of marketplace activities and institutions (Bartels 1976), the 1960s witnessed the ascendance of a micro-orientation that focused on buyer behavior and how to influence or respond to it,
presumably resulting in a best possible outcome for exchanging parties (McCarthy 1960). This primary attention to exchange dyads and transactions largely ignored the institutional networks of which they were a part, their social contexts, and the dynamics of both buyer and seller behaviors upon institutional structures. This neglect prompted new academic attention to these concerns and the development of a “macromarketing movement” (Hunt 2012).

The domain of this emerging field of study was explained in the first issue of the Journal of Macromarketing by Shelby Hunt (1981): “Macro-marketing [hyphenation was common before the mid 80s] refers to the study of (1) marketing systems, (2) the impact and consequence of marketing systems on society, and (3) the impact and consequence of society on marketing systems (p. 8).” This definition was later modified as the journal’s subtitle, “Examining the interactions among markets, marketing, and society.” The Spring 1990 issue of the Journal of Macromarketing included an extensive bibliography, organized under eleven subtopics (Fisk, cited in Shapiro 2012): (1) comparative marketing and development, (2) cultural behavior and social change, (3) ecological marketing, (4) ethics of marketing, (5) externalities of macro-consumption and macro-institutional behavior, (6) macro-consumption, (7) macro-institutional behavior in marketing channels, (8) macromarketing management, (9) macromarketing methodology, (10) macromarketing performance evaluation, and (11) public policy and marketing regulations. Shapiro (2006), an early editor of the Journal of Macromarketing, organized his own reading list under the following categories: (1) macromarketing - the broader context and early definitional efforts, (2) developing the domain of macromarketing, (3) macromarketing and systems thinking, (4) markets and their regulation, (5) externalities and impacts, (6) the politics of distribution and the consumer activist, (7) marketing ethics, distributive justice, and the disadvantaged consumer, (8) macromarketing and the quality of life, (9) sustainability and consumption, (10) history, thought, and macromarketing, (11) macromarketing and economic development, and (12) macromarketing dimensions of food distribution. Shultz (2015), then editor of the Journal of Macromarketing, provided an alternative, more concise, breakout of key topics: (1) competition, (2) markets and marketing systems, (3) marketing ethics and distributive justice, and (4) global policy and environment.

Following is a selective review of macromarketing scholarship, gleaned from the Journal of Macromarketing and other sources that have published relevant scholarship. This review is categorized to reflect these varying topical taxonomies – with the seemingly relevant addition of “religious influence in marketing systems, institutions, and conduct” – which also correspond to those key issues and concerns addressed in Laudato si’. (A supplementary, more extensive bibliography, also categorized according to these topics, has also been prepared to illustrate and establish the breadth and depth of macromarketing scholarship that responds to those issues and concerns. (A more recently emerging theme in the macromarketing literature is that of social entrepreneurship, ignored in this study because, while it clearly and positively supports the social impact dimension of both the macromarketing project and LS, it is not explicitly advocated in this encyclical and seems primarily managerial in character.)

Systems – relationships and dynamics. As suggested above, the most fundamental demarcation between macro- and managerial marketing is that the macro orientation extends beyond isolated transactions of buyers and sellers to the interplay among their circumstances. Relationships and external factors such as public policy, technology, demographics, and culture - which are subject to change - also come into play.

An early perspective on the socio-economic implications of marketing, more specifically advertising, is represented in Borden’s 1942 examination of its economic effects. More recently, within the macromarketing canon, these marketing-society interactions have been explored in depth by Wilkie and Moore (2014), Layton (2015), and the Wooliscrofts (2018).
Wilkie and Moore catalogue the social benefits associated with product development, information, and cost reductions associated with scale and market competition. Layton’s work references nearly forty years of scholarship in sociology and related fields that reflect the system dynamics incorporated in the macromarketing perspective. It explains the presence of systemic, both vertical and horizontal, network connections within and among markets. It gives particular attention to their dynamics over time – how new connections form and existing connections grow and adapt – or erode – in response to combinations of external and internal changes. The Wooliscrofts recognize both the positive effects of exchange systems on human welfare and the associated concerns with overconsumption. This systems approach is clearly in tune with the thinking reflected in LS, i.e., that contemporary market structures and conduct contribute to environmental degradation and poverty, while opportunities exist for corrective actions within market systems that might reverse these trends.

Marketing system dynamics have been examined in previous macromarketing scholarship. For example, Carman and Dominguez (2002) studied economic transformation in Eastern Europe following the fall of Communism. Guiltinan and Sawyer (2001) and Hagerty (2001) offer insights on how managerial decisions affect the public's welfare. Redmond’s study of the U.S. housing market leading up to and during the “Great Recession” (2013), exemplifies market failure, the profound consequence of the interplay of management and consumer decisions in different sectors of that market in the absence of both prudent restraint and, arguably, adequate regulation. Most recently and conversely, Kadirov (2018) has proposed harnessing marketing systems to achieve public good as well as satisfying participant objectives – a vision that also reflects the work of Charles Slater, a founding member of the macromarketing community (Nason and White 1981).

Economic development. Attention to macromarketing factors affecting markets and marketing first developed in the academy in the 1950s. This attention was most prominently manifested via inquiries into the relationship between marketing systems and economic development, particularly in Latin America, Asia, and Africa (e.g., Galbraith and Holton 1955). Beginning in the 70s, scholars who identified with the macromarketing project, per se, focused on this issue (Anderson 1970, Bucklin 1976, El-Sherbini 1983, Etgar 1983, Joy and Ross 1989, Mullen 1993, Ortiz-Buonofina 1987 and 1992, and Porter 1993). Researchers noted that agricultural and industrial development were challenged by political conflicts, insufficient capital, and limitations in transportation and communications infrastructure. It also appeared that primitive, but culturally supported atomistic channel structures, difficult to scale up, together with information and incentive asymmetries, inhibited needed investment. Commitment to traditional distribution methods prevented the adoption of more efficient methods and structures. While advancing development was of primary interest, some “dark side” dysfunctions flowing from a singular focus on economic outcomes were also recognized (Nguyen and Pham 2011, Lacznia 2017). Responding to those challenges, macromarketing scholars have proposed a range of approaches intended to improve the distribution of food and other products, and to aid hunger and poverty relief (Klein and Nason 2001, Davies and Torrents 2017). As the range of issues explored in the macromarketing literature has grown, inquiry into efforts to improve economic conditions for less developed regions and nations has continued (Lusch 2017).

Externalities and the environment.

Given the focus of Laudato si’ on preserving the environment, the extent of concern with this subject in the macromarketing and closely related literature is notable. The interest in the relationship between environmental concerns and marketing dates to the first emergence of the subdiscipline (Fisk 1974) and became a major theme of macromarketing scholarship in the late
90s (Kilbourne, MacDonough, and Prothero 1997). Of course, the larger question of “externalities,” e.g., social costs that are not incorporated (i.e., priced) in the values incorporated in market exchange transactions, is widely attributed to Kapp (1950). Klein (1977) identified positive as well as negative effects that may also include unexpected gains or losses for transacting parties as well as alternative schemes for measurement. Mundt and Houston (1993, 1996, and 2010) also explored the measurement question. Crane (2000) considered the moral dimension of environmental preservation. Chaganti and Heede (1981) considered a more expansive normative framework for evaluating marketing outcomes. Most recently, Redmond (2018) examined the concept of market failure in which externalities (including, but not limited to environmental effects) figure prominently. Fuller (1999), Peterson (2013), and Gollnhofer and Schouten (2017) have provided a more formative, positive concept of sustainability to marketing practice and market outcomes. Finally, specific problems confronting the task of environmental sustainability have been addressed, e.g., energy conservation (Powers, Swan, and Lee 1992), education (Kilbourne and Carlson 2008), rural development (Dapice and Xuan 2011), planned obsolescence (Guiltnan 2014), and fashion (Ekstrom and Salomonson 2014, Ertekin and Atik 2015). This level, breadth, and duration of interest in environmental matters confirm the alignment of macromarketing scholarship with the focus of Laudato si’. Both envision the physical environment as overly stressed by economic machinations that require intervention.

Quality of life (QoL).

The macromarketing perspective encompasses a wider set of criteria for evaluating the performance of a socio-economic system than the customary reliance on economic measures (e.g., gross domestic product, income, employment). Macro outcomes are a major point of concern, as previously noted, in Laudato si’. In the field of sociology, research aligned with expanding narrow economic thinking about outcomes is referred to as “quality of life” or “social indicators” research. These streams of scholarship encompass such measures as crime rates, infant mortality, and life expectancy as well as more traditional economic measures (Noll 2018). This broadened understanding of market performance has been imported as a principal theme into macromarketing scholarship. A prominent example of this challenge to the limits of a narrow economic perspective is that of Kilbourne, McDonagh, and Prothero (1997), which recognizes its environmental implications. Coincidentally, Peterson and Malhotra (1997) examined quality of life in a global context, i.e., comparing different nations. A characteristic of the marketing concept - i.e., consumer orientation - is represented in the macromarketing literature by Malhotra (2006), which identified “consumer well-being (CWB)” as the basis for evaluating QoL. Sirgy and Lee (2006) also proposed ways to measure this elusive concept. Recognizing that consumer well-being can vary within and across consumer populations, i.e., might be assessed subjectively (Lee et al. 2002, Peterson and Ekici 2007, and Sirgy et al. 2008), was also an important contribution to this scholarship. Hill, Felice, and Ainscough (2007) considered the ethical dimension of human rights as an element of QoL. In addition, we should recognize the social or communitarian aspect of QoL. That perspective is represented in work by Peterson (2006) and by particular attention to developing nations, e.g., Mullen et al. (2009), including "work life" (another CST criterion), e.g., (Nguyen and Nguyen 2011). Finally, we should note that Layton (2009) introduced the larger marketing systems perspective to this discussion. The above examples of macromarketing scholarship involving QoL issues can be seen as both reflective and informative regarding relationships among economic development, environmental preservation, and other social concerns discussed in Laudato si’.
Consumer culture.

Consumer values and behaviors (“consumerism [34]”), identified in Laudato si’ as problematic in the context of environmental stewardship (Pope Francis 2015 [34]), also constitute a prominent theme in the macromarketing literature. (An earlier concept of “consumerism” focused more on consumer protection issues (e.g., product safety and misleading advertising, (c.f., Pappalardo 2012)). A prescient attempt to frame this critique was Dröge et al. (1993), who recognized both materialism (what might be termed “goods displacement”) and the individualistic orientation of consumers as socially dysfunctional behaviors. Pollay (1986, 1987) and Holbrook (1987) discussed the effect of advertising on this issue, while Rassuli and Hollander (1986) considered consumer desires as apparently limitless. Belk (1988) noted – and questioned – the role of consumer demand in less developed economies, expressing concerns echoed decades later by Eckhardt and Mahi (2012). In line with the overarching ecological concern and the sustainability focus of LS, the environmental implications of consumption have been a subject of exploration in macromarketing for a long time (Dolan 2002, D. Martin et al. 2019). However, an alternative aspect of consumer culture, i.e., power, is its potential to stimulate ethical, community-oriented consumption on the supply side of markets (Scott, Martin, and Schouten 2014, Gorge et al. 2015, Heller and Kelly 2015, Papaioikonomou and Alarcon 2017). Of particular interest in this respect, reflecting both the focus on social justice in CST and the LS emphasis upon the justice implications of environmental deterioration, is the study of fair-trade consumption by Lindenmeier et al. (2017). Among the most recent contributions to consumer culture discussion are considerations of the social significance of some examples of consumption (Ulver 2019) and the methodology for considering the intersection of macromarketing and consumer culture theory (Fischer 2019, Lucarelli and Giovanardi 2019, Saacioglu and Corus 2019).

Distributive justice – The poor and vulnerable.

As previously noted, distributive justice and the “preferential option for the poor” are prominent criteria in CST. Laudato si’ notes the significance of these measures at [48]. A review of the macromarketing literature indicates these criteria have been frequently examined, at least since the mid-1990s (Morgan 1994) in terms of various social outcomes. Distributive justice as related to marketing practice has been extensively examined in general terms, notably in a special 2008 issue devoted to this topic (See, e.g., Crul and Zinkhan 2008, Ferrell and Ferrell 2008, Laczniak and Murphy 2008, Klein 2008), and most recently, the formulation of a multi-dimensional model for evaluating marketing conduct and performance (Facca-Miess and Santos 2016). The underlying concern with vulnerable consumers, subject to predatory practices, has also received considerable attention (See, e.g., Ringgold 2005; Baker, Gentry, and Rittenburg 2005; Commuri and Ekici 2008; Pavia and Mason 2014; Baker et al. 2015). The abiding concern with the poor (epitomized in Laudato si’ at [48]) has been frequently addressed over the years in macromarketing scholarship (Andreasen 1997, Hill 2002, Kotler, Roberto, and Leisner 2006, Laczniak and Santos 2011, Agnihotra 2012, Gau et al. 2014, Kolk 2014). Another, related issue given considerable attention by macromarketers is that of “redlining” - discriminating against segments or clusters of potential demand that promise higher costs or lower revenue (D’Rozario and Williams 2005, Wang and Tian 2014, Cerovecki and Grunhagen 2016, Klein 2016). Finally, macromarketing scholars have brought principles of justice to bear on a variety of other topics, e.g., “fair-trade” (Beji-Becheur, Pedregal, and Ozcaglar-Toulouse 2008), information quality (Lee and Geistfeld 1999, Viswanathan and Gau 2005, and Mascarenhas, Kesavan, and Bernacci 2008), and intra-channel pricing (Kambewa, Inkenbleek, and van Tilburg 2008).
Ethics and corporate social responsibility.

Insofar as the macromarketing movement responded to the external limitations of the managerial orientation, it should not be surprising that its scholarship has an important moral dimension as well as a systems perspective. Although ethics and social responsibility are addressed in the mainstream managerial literature (e.g., Ferrell and Gresham 1985; Goolsby and Hunt 1992; Dunfee, Smith, and Ross 1999, Oliveira and Lumineau 2018), it is arguably, perhaps logically though unfortunately, of secondary interest in that milieu. Conversely, given its systems perspective and interest in the marketing-society nexus, macromarketing scholarship provides a natural and primary platform for scholarship involving ethical principles and/or societal responsibilities. To the extent that ethical principles are rooted in religious teachings, the subject of this inquiry - an encyclical concerning ecological ethics - religion-based ethics deserves separate attention (see below). However, there is a substantial volume of macromarketing scholarship in which an explicit religious dimension is absent. Including works on distributive justice (cited earlier), marketing ethics is frequently prominent (even warranting its own Associate Editor) in the Journal of Macromarketing (e.g., Hunt and Vitell 1986 and 2006; Laczniak et al. 1981, 2006, and 2011; Gundlach and Murphy 1993; Priddle 1994; Bone and Corey 1998; Nil 2003 and with Schibowsky 2007; Ekici and Ekici 2016). Ethics is also covered in books authored or edited by scholars associated with the Macromarketing Society (Murphy et al.2005; Ferrell et al. 2007, 2015; Enderle and Niu 2015; Haase 2015; Martin and Johnson 2015; Nill et al. 2015; Sparks 2015; Vitell et al. 2015a, 2015b). The "stakeholder vs. stockholder" debate reflected in LS (Pope Francis 2015 [190]), customarily attributed to the strategic management literature (e.g., Freeman 1984, Smith 2003), has also been explored in the macromarketing literature (Maignan and McAlister 2003). General understandings of social responsibility have also been studied (Drumwright and Murphy 2001; Gonzales-Patron and Nason 2009; Beschorner, Haiduk, and Schank 2015; Laczniak and Murphy 2015). Another pillar of CST and a foundation concept in LS (Pope Francis 2015 [18, 23, 156]) is the common good, the theme of a recent University of Notre Dame symposium (See, e.g., Furuhashi and McCarthy 1971 and 2014, Gaski and Etzel 2014, Murphy 2014). Finally, some specific challenges and opportunities in marketing ethics have been examined in this literature and warrant referencing in this review (Polonsky and Grau 2008, Smith et al. 2001 and 2015, Schultz 2015)

Governance - Public policy and regulation.

From the late 19th century trust-busting era forward, public policy intended to influence market structure, conduct, and performance has mostly been responsive to a market failure framework i.e., the inability of unrestrained competition to produce consequences in line with social welfare. Thus, efforts to control monopoly, improve resource usage, control pollution, and avoid the exploitation of vulnerable workers and consumers have produced a web of regulations, mandates and prohibitions. The resulting administrative bureaucracy has often simply exchanged market failure for regulatory failure that hampers innovation and efficiency, i.e., remediation that costs more than the dysfunction intended to be corrected and/or unreasonably favors some participants to the disadvantage of others.

An important and very controversial aspect of LS is its recognition of the role of “politics,” i.e., governmental policies and regulations, in reducing pollution and improving resource conservation (Pope Francis 2015 [57]), even at a transnational level. While not proposing any particular approach to policy formulation, “a matter for experts” LS asserts, the variance in policies across nations is clearly a source of concern and an opportunity for future scholarly analysis and rectification.
This is also the view advanced by Vogel (2018): that governments can – and do – create and shape those spheres of exchange we refer to as markets, implying that the "market failure" framework is incomplete. For example, "regulation of competition" can be formulated with the public interest in mind; those policies may or may not conform to the interests of individual firms threatened by monopolistic conduct, let alone those engaged in it. Likewise, natural resource conservation and pollution control might better be achieved through programs that encourage innovation rather than specifying approved reduction processes or emissions targets. Vogel’s main point is to recognize a positive role for governments in stimulating market systems rather than limiting that role to policing abuses.

Over the decades, public policy has also been a pillar of macromarketing scholarship, reflecting its place in marketing systems. As discussed earlier, macromarketing scholarship related to environmental challenges and sustainability has significant implications for public policy. Broader topics of marketing, regulation, and public policy have been addressed in the Journal of Public Policy and Marketing by scholars with macromarketing interests (Nason 1988, Mazis 1997), while market and regulatory failure, in general terms, have been examined quite thoroughly in the Journal of Macromarketing (Harris and Carman 1983, 1984; Carman and Harris 1986; Redmond 2009, 2013, 2018). More focused examples of macromarketing scholarship include public policy in developing nations (Bennett 1967, Thorelli 1981, McPherson 2011), consumer protection (Antil 1984, Andrews 2001, Moorman 2001, Charlebois and Labreque 2001), advertising (Harker and Harker 2000; Bloom, Edell, and Staelin 2001), channels (Carman 1982, Dickinson 2003), anti-trust regulation (Gundlach 2001), and global regulation (Nason 2008). Whether this extensive body of work by macromarketing scholars is adequately responsive to Vogel’s appeal for a more positive approach to public policy in marketing, particularly in the area of environmental stewardship, may be debatable. However, innovations in marketing strategy and practice – and public policies that encourage conservation efforts – seem to provide a response to LS that may avoid the net costs associated with regulatory failure.

Religion’s implications for marketing, consumption, and markets

As this paper explores the alignment between issues of interest in macromarketing and in LS, it seems useful as well as relevant to point out how the relationship between marketing and religion has been examined over the years, both in the macromarketing academy and by a broader school of marketing scholars. First, the marketing-religion relationship has been studied in general terms (Kale 2004, Mittelstaedt 2002, Dann and Dann 2016, Drenten and McManus 2016). In the context of the social sciences, religion is usually viewed as a socio-cultural phenomenon. When applied in marketing theory, religion is seen as influencing consumption (LaBarbara 1987, Mathras et al. 2016, Yurdakul and Atik 2016, Chowdhury 2018a, 2018b, Khan 2018, Razzaq et al. 2018) and business practices (Friedman 2001; White and Samuel 2016; Klein, Laczniak, and Santos 2017; Cui, Jo, and Velasquez 2019; Hu, Lian, and Zhou 2019). The more normative perspective represented has been offered previously (e.g., Klein 1987, Dixon 2001, Klein and Laczniak 2009), including work specifically focused on environmental concerns (Leary, Minton, and Mittelstaedt 2016; Landrum, Tomaka, and McCarthy 2016; El Jurdi, Batat, and Jafari 2017). Of exemplary interest is a study about economic globalization and growth vs. the influence of religion in developing markets (Sandikci et al. 2016). These and other examples are significant indicators of the Journal of Macromarketing's hospitality to diverse marketing-religion inquiry.

The “Authentic Anthropology” of LS and Macromarketing

The fundamental debate about environmental ethics posed in Laudato si’ is cultural rather than theological in nature. In that framework, the economic critique of profit seeking, growth, and
limitless consumption (defined solely in material terms) in LS is subsidiary to a larger understanding of the human relationship to the environment, i.e., whether humankind seeks “dominion” or responsible stewardship (Pope Francis 2015 [117]). The Franciscan vision that informs LS takes exception to the ‘dominion ideology’. That dominion model implies that economic endeavors and the technological advances they generate are independent of both their ecological impact and the social principles proposed in most religious traditions, i.e., human dignity, common good, preference for poor and vulnerable populations, solidarity, subsidiarity, and worker rights, as well as environmental stewardship.

Conversely, in the search for a more integral ecology, as discussed above, the vision laid out in LS fosters what Francis refers to as “authentic social progress [4],” “authentic human ecology [5],” and “authentic human development [5],” i.e., an overarching culture that sees the human-nature relationship as integrated, thus, “authentic” as defined by Handler (2015) in his discussion of cultural identity and aspiration. In this vision of ecological ethics, care for planet and care for each other are mutually reinforcing and incorporate economic objectives in a supporting, not superior role. For those interested, the pursuit of an economic system that provides a platform for “authentic well-being” is spelled out further in a detailed reflection published by the Congregation for the Doctrine of the Faith (2018 [6]).

Perhaps surprising to some, macromarketing thinking tends to echo this Franciscan vision for achieving the ideals of “on care for our common home.” Perhaps, most significant, is that macromarketing thinking tends to reflect an understanding of the significance of both a deep concern for others (Kadirov, Varey, and Wooliscroft 2014) as well as an attention to the common good (Kadirov 2018). In summary, a sympathetic reading of Laudato si’ yields valid guidance for public policy and corporate conduct in the long tradition of macromarketing scholarship.

Concluding Comment

Implicit in the conception of this paper was the prospect that this religious document (LS), presumed to reflect a moral theology of environmental stewardship, is mutually fortifying relative to a school of thinking – macromarketing - that reemerged from the bins of intellectual history more than forty years ago in response to the then ascendant managerial orientation. This mutual fortification (macromarketing theory and its environmental manifestation) provides (1) a measure of that expertise called for in Laudato si’ and (2) moral parameters – i.e., objectives and limits – for marketing systems that support Francis’ vision for caring about “our mutual home.” We conclude that Laudato si’ provides both an agenda for relevant, issue-oriented analysis and criteria against which business and consumer conduct and public policies can properly be compared.

A Trumpian Postscript:

As this is being prepared (and at least for the past two years) the “authentic” anthropology and ecology advanced in Laudato si’ has been ignored in favor of what might be viewed as a distorted, frankly extreme version of the dominion model. Particularly in the US, but also in other parts of the world where economic demands have regularly become first priorities, we find demonstrated violations of the principles of both environmental stewardship and solidarity. Consider:

1. Climate change skeptics and Paris Accords renouncement;
2. Increased lobby power from industry and individuals having an economic interest in freedom from regulatory intervention;
3. Relaxed environmental regulation and enforcement;
4 Expanded coal, oil, gas, and minerals extraction, with both direct and indirect adverse effects on the environment;
5 Abandoning multilateral commitments for bi-lateral agreements and/or favoring “MAGA-style” isolationism;
6 Evidence of support for autocratic foreign governments that also echo disregard for CST principles;
7 Alignment with isolationist and/or other foreign governments (e.g., Brazil and UK) that indicate a primary policy focus on domestic economic concerns and rejection of more global approaches to both economic and environmental questions;
8 Political appointments and ideology in U.S. government agencies and departments such as the DOJ, HLS, EPA, HHS, DOA, FCC, and FTC that ignore CST and LS principles.

At this time, the message of Laudato si’ appears to be a “voice in the wilderness.” However, to end on an optimistic note, LS is also a call for macromarketing scholars to seek ways to make markets work better in support of environmental stewardship and to author a blueprint for ecological approaches that enhance human well-being across the globe.

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Research widely recognises social connections and networks as an important resource for market exchange in resource-poor contexts (Coleman, 1989; Collier, 2002; Krishna & Shrader, 1999; Narayan & Pritchett, 1999; Viswanathan et al., 2014). As a consequence, governments and powerful development institutions like the World Bank have lauded social networks and connections of the rural poor in developing economy contexts as a form of capital that can be used to mobilise other forms of capital and raise the functioning of human capital (Collier, 2002). Defined by Portes (2000) as ‘the capacity of individuals to command scarce resources and secure benefits by virtue of their membership in networks or other broader social structures’ (Portes, 2000), social capital was seen as a panacea for improving rural development. Given its potential contribution to various development outcomes, social capital became the subject of practical experimentation and empirical research. The general consensus amongst scholars from various disciplines is that social capital can improve the efficiency of economic capital by reducing transaction costs (Adler & Kwon, 2002) and is also an important element to cut-down on the costs and uncertainty of market transactions (Kherallah & Kirsten, 2002; Putnam, 1993). Due to limited resource endowments and relatively poor states of human resource development, buyers and sellers in markets rely on their stock of social capital to mobilise other forms of capital (Barrios & Blocker, 2015; Viswanathan et al., 2014). Taken together the overall consensus from previous literature points to putative significant and positive outcomes of social capital on economic growth.

Based on survey research of how smallholder farmer entrepreneurs in Zimbabwe secure benefits from the land resettlement program, this paper contends that the notion of social capital put forward by Portes (2000); (Putnam, 1993) does not have a discernible effect on the networks and connections between resettled smallholder farmer entrepreneurs. This paper argues that social capital is often eroded when low income households are relocated to new resettlement areas, because social capital is generally mobilized through family ties, friends, and associates, which get disrupted during a resettlement process (Woolcock & Narayan, 2000). This paper builds on the research on ‘missing social capital’ (Paldam & Svendsen, 2001) or ‘destruction of social capital’ (Chloupkova, Svendsen et al., 2003), which show how social capital among resettled small-scale farmers in Eastern and Central Europe was destroyed by communist regimes.

Indeed, the findings illustrate that social capital may not be useful in understanding market exchange of smallholder farmer entrepreneurs. Instead social capital is often eroded when low income households are relocated to new resettlement areas, because social capital is generally mobilized through family ties, friends, and associates, which get disrupted during a resettlement process (Woolcock & Narayan, 2000). A possible explanation for the lack of impact of social capital originates in the idea that the state-led land resettlement program dismantled structures of social organization and destroyed mutual networks between smallholders (Cernea, 1995). Land resettlement tends to be a highly bureaucratic top-down activity that constrains the possibilities of formation of networks and collective action. Anecdotal and empirical evidence on the land resettlement in Zimbabwe (e.g. (Matondi, 2012; Moyo & Yeros, 2013; Scoones, Ritter et al., 2010) also suggests problems of cronyism and patronage which may impact formation of social capital. The social findings inadvertently show that structural change in particular contexts (e.g. land redistribution) displaces long-held stocks of social capital, and any newly formed social capital may not really have that much
influence for as long as 10 to 15 years after the changes. It raises some interesting questions for social capital literature itself in terms of whether and when it influences economic phenomena. This enriches the existing knowledge on the impact of social capital and prompts researchers to question their thinking about the effect of social capital.

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Clashing Cultures and Sub-Cultures in the Formation, Growth and Continuing Evolution of Complex Provisioning Systems

Roger A. Layton, UNSW Sydney
Christine Domegan, NUI Galway
Stanley J. Shapiro, Simon Fraser University

Abstract

The paper will discuss two ways of thinking in macromarketing contexts about the almost overwhelming diversity of network structures that self-organize in human communities, as individuals seek to make available the assortments of goods, services, experiences and ideas that people need and want. The formation, growth and evolution of these complex networks that we call provisioning systems, can be studied using a top-down, outside in, macro-utilitarian calculus, blurring individual and factor identity, or by retaining a bottom-up, inside out focus on individual diversity, collective self-organization and innovation; or as we argue, both points of view are essential complements in considering provisioning system conflicts and crises. The first focusses on overall system dynamics, the second on capturing the individual and group differences that lead to cultural clashes within system operations. The first calls attention to stability, efficiency and effectiveness in system outcomes, the second highlights debate, innovation, change and system fragility. Both are needed to help in achieving a balance between the extremes of bureaucratic blindness and endless disorder. We then note ways in which cultural clashes in the workings of a provisioning system can be resolved; and conclude by asserting that in most if not all of these situations, equilibrium is occasional and accidental, that dynamic balance between stability and innovation is essential, and that as a consequence continuing informed intervention and management is necessary. While cultural clash and crisis in a provisioning system is challenging and often troubling to resolve, it is an essential part of the evolutionary processes that enable complex, multi-level networks of provisioning systems to form and re-form, to innovate and grow, or sometimes collapse, in environments that are always changing and often extreme. Looked at like this, clash and crisis is an essential part of the evolutionary dynamics shaping daily life in every human community.

Clashing Cultures and Sub-Cultures in the Formation, Growth and Continuing Evolution of Complex Provisioning Systems

“Marketing is not primarily a means for garnering profit for individual. It is, in the larger, more vital sense, an economic instrument used to accomplish indispensable social ends. Under a system of division of labor there must be some vehicle to move the surplus production of specialists to deficit areas of society. This is the social objective of marketing”.

(Breyer, 1934, p 192)

Introduction

Provisioning systems are social systems which touch most aspects of everyday life, both contemporary and historical, and as such, at all levels, shape and are shaped by the diverse cultures – micro, meso and macro – that coexist in most communities. They form in response to human needs and wants in remote communities, in villages, cities and countries; they are present in street-side stalls, bazaars, pasars, shopping centres; they come into existence as economic value-based exchange generates complementary flows of money, information,
power, risk, ownership and possession. Provisioning systems may be regulated or informal, subject to law or only to social constraints and norms; they may be criminal, outside the laws of the community, or simply shadow in nature. Provisioning systems design, administration and finalising are essential to disaster recovery. They are often centrally or state controlled, as for example in health, education, religion, defence and many other sectors, or blends that may coexist with private enterprise and with informal, uncontrolled exchange networks; they may be structured or open, based on computerized platforms, sharing networks, franchise or contractual systems. The networks of interest may be micro, perhaps a single family searching for ways to survive, perhaps meso in the form of supply chains, distribution channels, cooperatives and collaboratives such as kibbutzim, or macro focussed as for example on international trade links from silk roads to trade wars. In most communities many of these forms of provisioning system will coexist, each comprising networks of marketing systems, each provisioning system generating its own history, cultural identity and embedded institutions, each competing, coexisting, complementing or collaborating with many others, sometimes supervening, sometimes embedded. Each is a direct consequence of individual and collective choice reflecting the particular blend of individual self-interest, the human desire for mutuality, and a collective shared understanding of what is fair and ethical that exists in every community. Each provisioning system is challenged by continually changing flows of information, innovation, power and ethics. It is the task of managing in and of reaching sustainable outcomes for multi-level provisioning systems that is the subject of this paper. More specifically we are concerned with situations where “the infinite desire for growth” (Cohen 2018) is likely to lead to disagreement, dispute and sometimes conflict amongst the ever-changing networks comprising a provisioning system.

Disagreements, disputes and possible conflict begin to surface when a provisioning system begins to form. Usually a consequence of an environmental or internal stimulus where individuals, groups and entities see an opportunity for improving their situation, the formation and growth of a provisioning systems results from the local interactions of participants working with each other, exchanging ideas, developing norms and social practices that seem to work. These interactions combine though self-organization to generate local provisioning networks, each with a distinctive sub-culture, institutional logic (Thornton, Ocasio, Lounsbury 2012) or set of “customary motivations, convictions and behaviors” (Schlicht 1998, p 1). In this way, in every human community, almost countless local provisioning systems form, grow, evolve and sometimes collapse, each system with its own distinctive culture of beliefs, behaviors, norms and values, each path dependent and shaped by history, all deeply influenced by, but separate from, over-arching social cultures. As each provisioning sub-system forms, grows and changes in environments where climate change, technologies, economies and values are likely to limit or modify growth prospects, it is likely that each provisioning sub-system will rub up against other local sub-systems leading to clashing cultures, institutional logics and customary behaviors at all levels. The consequences are of everyday concern, often sharpened by crisis, either internal or external, which directly affect the capacity of provisioning systems at any or all levels to deliver desired quality of life outcomes.

When for example public-private partnerships form in the provision of health, education, transport and many other sectors in human communities they often encounter situations where the cultures behind public and private provisioning systems clash, creating dissention and sometimes disruption. This can also happen when technologies shape provisioning systems – the challenges of Uber to an established taxi service, of AirBNB to hotels in tourist accommodation, of Amazon direct delivery of everything from groceries to books to the ability of local retail to survive. It is difficult to resolve when environmental or local activists intervene as external stakeholders in challenging directly or indirectly coal mining operations, river
fishing or pristine reef locations. The cultures underlying alternative economies developing in local communities may also clash with existing market based systems (Haase, Becker, Pick 2018). And in another world, the millions of people in India living in extreme poverty often exist on the fringes of market-based trade systems, touched perhaps by the possibilities of microfinance, of MNC seed distribution, but with little ability to step outside an existing culture (Jagadale, Kadirov, Chakraborty 2018).

Figure 1: Mapping some of the possibilities for provisioning system formation and growth.

Figure 1 provides a glimpse of the wide range of situations where clashing cultures might emerge. Associated with each label in the Figure, adjacent, complementary, or competing sub-systems can form and grow each with their own distinctive culture and history. It is here that many of the clashes, sometimes open, sometimes hidden, between sub-system cultures in the pursuit of provisioning needs and wants, take root and grow. Understanding the complex system dynamics that produce this diversity of cultures is, we suggest, crucial to searching for ways of intervening in a focal situation, and of achieving a favourable trajectory over time and space.

How do provisioning systems form and grow? The view from the top down! From the outside in?

Provisioning systems form and grow in order to meet existing and anticipated provisioning needs and wants. Taking from the literature concerned with formation, growth and adaptive change in marketing systems (Layton 2015; Layton and Duffy 2018; Layton 2019), individuals and entities in a community will respond to perceived opportunities or threats to self-organize specific networks over time and space, drawing on, where appropriate, supervening, adjacent, and embedded community networks. Depending on location in the social space of the community an individual or entity will sometimes utilize existing top-down leadership or control gained through meeting other social needs such as a search for meaning in life, or for defence against others, or governance, or work with others to form a cooperative or collaborative response, or perhaps most commonly to specialize and exploit gains from trading with others thereby meeting the community’s needs and wants for products, services, experiences and ideas.
To bring this about a community will utilize primary social mechanisms such as communication, cooperation, specialization and scale economies, self-organization and emergence, drawing on the diversity of economic, social, and physical capital amongst individuals within a community to develop the assortments needed for effective provisioning. As provisioning systems form and grow, they in turn generate complex, secondary social mechanisms including delivery systems, stakeholder action fields, value exchange fields and technology evolution systems. The quality of life outcomes delivered by these multi-level, intricate, network based systems will reflect the social cultures in which they are embedded, and will in turn impact or change those social cultures as each of many provisioning systems evolve.

Provisioning systems, considered as networks of voluntary, value-creating exchange, begin to form as individuals, diversely endowed with values, capabilities, capital and insights, recognizing the provisioning needs and wants of others, usually nearby, see benefit in trading with each other, sometimes through barter, sometimes with some form of credit or money; in the process forming networks of trade or exchange relationships that persist over time as participants begin to understand and trust each other, anticipating needs, and learning how to frame meaningful offers.

As trade builds up, both sellers and buyers see benefit from specialization, and the gains possible from forming cooperative groups to participate in meeting existing and emergent needs and wants. These self-organized groups become businesses, each with a network of embedded marketing systems, each investing in and shaping exchange. The assortments of goods, services, experiences and ideas on offer in a community change, often broaden and deepen, sometimes narrow and fall; investments in tangible and intangible infrastructures – such as stalls and shops, logistics, suppliers, complementary relationships, brands and images - are made, anticipating future demand and hoping to shape it in ways that attract profit, the mutual co-creation of value, increasing social and economic power, and building leadership claims. Self-organized stakeholder groups begin to form, within increasingly complex delivery systems, looking for or competing for power within and among embedded marketing systems; technologies evolve as participants look for minor and major shifts that will enhance customer attractiveness, increase efficiency, boost standing in marketing systems and just sometimes open the door to wider horizons such as connectivity, access to information, and the possibilities of artificial intelligence; and as values change, internally or externally, so too do cultures, procedures, behaviors and outcomes. These processes are illustrated in Figure 2 below.
As the networks of trade grow within a community some actors will reach out to neighbouring communities in search of more and wider opportunities to bring attractive new products, services and experiences, to say nothing of ideas. Reaching out may be as simple as the silent trades between remote communities, or as complex as the formation of trade routes, international trade fairs or Belt and Road initiatives.

And so it is provisioning systems begin to form, grow and evolve over time, each being the product of communication, learning, cooperation, specialization, self-organization, and emergence, forming ever-more complex levels of embedded, complementary and supervening provisioning systems, each jostling for fitness and survival in an ever-changing community. Provisioning systems can be seen as complex, social mechanisms that form at all levels in every human community as individuals and entities within the community seek the goods, services, experiences and ideas which they need and want.

The provisioning systems and sub-systems that emerge from this ever-changing, dynamic process differ dramatically in structure, function and behavior. The first, and often most important factor driving these differences is culture, both in a community as a whole and in key sub-groups. Culture is a primary determinant of local understandings, patterns of behavior, beliefs, norms, moral commitments, values; it influences the way path dependencies develop over time as exchange relationships form and re-form; it shapes the growth of informal and formal institutions. Culture is, in turn, an important consequence of the formation and growth of provisioning systems. As these systems form and grow, the habits of everyday life may change, relationships shift, status and power will rise and fall, and beliefs may be challenged. In particular, the embedded, complementary and supervening provisioning systems linked to a system of interest (a focal system), will also reflect the cultural settings where each has evolved. These may for example range from informal to formal patterns of behavior, from stability seeking to creativity, from fixed to open structure, from self-organized to top-down hierarchy, from cooperative initiatives to restricted or imposed choice. Each of these possibilities and others may be present in the workings of a provisioning system; each may bring a distinctive sub-culture to the choices made by participants; and the mix of cultures across a provisioning system may be collaborative, coexistent, competitive, clashing and sometimes conflictual. The evolution of culture and its interconnections with the workings of provisioning systems is an ever-present background process.
While cultural factors are always current, driving on-going change in the formation and growth of provisioning systems, so too are issues such as creativity or innovation, the uncertainties of complex system functioning, and the impacts of catastrophes ranging from economic failures, to environmental and demographic disasters. The technologies associated with social media for example are producing profound change in the workings of provisioning systems at all levels as connectivity widens and deepens; complex systems are by nature unpredictable, non-linear, multi-level systems, where gradualism sometimes gives way without warning to tipping points and abrupt change. This is something that might occur at any level in a provisioning system, challenging survival in embedded, supervening and complementary systems. The possibility of catastrophe is always present, initiating profound change such as happened in New Orleans, or Haiti, or in Aceh, or the wars in Syria and elsewhere, or the demographics of mass migrations in the USA, Africa and in the EU.

In the past we have often identified rational self-interest as the primary driver of individual action, and then lost sight of individual differences, replacing them with systemic or average outcomes that are simpler to handle in managerial and administrative decision-making. While an “invisible hand” has been argued to work towards efficiency and effectiveness in the formation and growth of markets and thus provisioning systems, in reality this does not always happen. Vulnerable individuals and segments fall behind, escaping the invisible hand; self-interested initiatives on the part of some participants often encourage misinformation, sometimes exploiting individual weaknesses, sometimes cheating or worse. In the wake of economic or natural disaster, power struggles seem to take priority over individual needs and wants; the systemic trade-offs made necessary by sustainability crises seem often impossible to achieve.

How do provisioning systems form and grow? The view from the bottom up! From the inside out?

This approach to understanding the dynamics or provisioning system formation, growth and evolution begins with the idea that every individual or participant in a human community is unique. In this way of thinking each individual brings different understandings, values, and endowments to the choices they confront in everyday life. Each individual differs in life experience, judgments, capabilities, assertiveness, persuasiveness, social capital, power, willingness to look beyond the immediate future, acceptance of everyday life, interest in innovation and change, all impacting the way each individual participant frames the choices they confront. It is this diversity that drives debates, disagreements, clashing cultures, competition and conflict. It also underpins cooperation, self-organization and emergence; it drives innovation, and often leads to enduring inequality.

Each individual differs in the blends of values they bring to each and every choice, including self-interest reflected in an immediate “what is in it for me?”, in power, status, and relationships, mutuality in valuing social contacts and experiences, in empathy and solidarity, trust and leadership, and in willingness to cooperate, and including morality where fairness, ethics and moral norms are accepted. Each individual differs in the endowments of human, social, economic and locational capital that each can bring to the decisions they make. Each of these aspects of individual choice are deeply influenced by the cultures of the community from which participants come. And, in turn, community cultures at all levels are deeply influenced by the behaviors and patterns of people in their everyday life, for it is at this intersection that fitness is challenged as part the processes of cultural evolution (Etzioni 1988; Bowles 2016).

Retracing our steps and adding individual differences directly to the earlier account of provisioning system formation, growth and evolution, introduces an essential element to the
reality of diversity and focusses attention on to the management of the diverse cultures and sub-cultures that exist within provisioning systems. Managing a diversity of cultures, points of view, stakeholders, and individual endowments, is central to the challenges faced by contemporary marketing practice.

We begin then with a provisioning system of interest – perhaps an isolated hunter-gatherer village, a local community, a marketplace or pasar, a franchise network, a network of health or education providers, a rural farmer cooperative, or all of these. Whatever the focal system of interest, it consists of a diverse set of individuals, organizations and entities that form within the community. Each individual or entity has distinctive, often unique, capabilities and endowments. Each begins with an instinctive self-interest in the well-being of a household or family, blended with an equally distinctive desire for mutuality and for fairness or morality in dealings with each other. Each individual has specific needs and wants for products (for food, clothing, shelter . . .), for services (for help with the family, for advice, for repairs . . .), for experiences (for fun, sport, partying, celebrating, . . .), and for ideas (innovation, insights, understandings, perhaps religious beliefs, searching for what really matters . . .). Each individual or entity looks to their immediate surroundings and tries to make sense of what they see, framing the external world, establishing insights into the ways things work, and sensing opportunity to meet needs and wants, or threats to a way of life. Each makes choices – partially rational, based on the world they have framed, based on the interests they have in the moment of choice. It may be a choice to make woven bamboo baskets for sale, to join with others in specializing in a product or service, to set up a shop, to visit a medical centre, to send the children to school, to attend a church or mosque (Bowles 2016; Zak 2008).

In each case they are participating in, working with, or supporting a provisioning system that is an integral part of an overall provisioning system. Overall, the result is a highly diverse, perhaps countless, web of simultaneous, interacting, provisioning systems with changing, often deepening and widening assortments of goods, services, experiences and ideas on offer; more than that, the outcome is a multi-level web, with systems interacting with embedded, adjacent and supervening systems, perhaps for example shopping centres interacting with individual shops or service providers and with customers looking for mutuality and parking; it is complex, non-linear, and with dynamic feedback loops at all levels, prone to unexpected, disjunctive change, tipping points or possible collapse; it works differently for different sub-groups of individuals leaving some behind, the vulnerable, aged, impoverished, and rewarding others with increasing wealth and power; and it is sensitive to external or environment change.

Everyday life within a provisioning system is an almost endless series of choices, most responding to the simultaneous offers made by the web of provisioning systems, sometimes modifying an existing system, sometimes investing in or initiating something new, sometimes opening new horizons though innovation or invention, sometimes threatening collapse. Where this happens each of the participants involved have sensed opportunity or threat, perhaps a shift in customer preferences, a new or changed technology, a change in stakeholder values or power, or in the operations of a competitor or other adjacent system, or . . . While these are individual or collective choices, they are happening all the time across the workings of a focal provisioning system. Each choice is the product of an individually framed perception of local realities, based on limited information, reflecting both rationality and emotion. Each choice, depending on scale, has an impact on the workings of one or more of the web of sub-systems characterizing the provisioning system. As such, each choice provides support (or perhaps otherwise) for the culture of each of the impacted provisioning sub-systems – sometimes supporting an informal, street-side marketplace, sometimes a corporate brand in a major retailer, sometimes assisting a local cooperative venture, sometimes reaching out to a local hospital or medical provider, sometimes seeking training from an independent teaching
institution, sometimes participating in illegal, fraudulent or corrupt enterprise. In each situation it is the survival, and thus fitness, of the networks of provisioning systems that shapes the evolutionary dynamic of the higher level provisioning system in which the sub-system is embedded (Wilson 2019).

As delivery systems wax and wane, as power shifts in a provisioning system, as technologies open new horizons and as values change, the cultures of each participating sub-system and of the provisioning system as a whole are also in constant flux, sometimes clashing, sometimes collaborating or cooperative. This diversity of experience and in-built ability to adjust allows evolutionary adaptation of the provisioning system to environmental and internal, often disruptive, change.

Figure 1 provided a two dimensional mapping of some of the provisioning system cultures that often coexist in a community. There are many ways of mapping the possibilities – including assortment breadth, path dependency, innovativeness and others – all generating different cultures, all impacting efficiency and resilience. The two dimensions included are critical determinants of both efficiency and resilience. One focuses on the degree of choice openness offered by each provisioning sub-system, ranging from a top-down restricted choice that might vary from the narrow offerings of Mao China, or the prescriptive choice provided in a monastic community, or a state sector provider of medical or health services, to the bottom-up, free choice offered by retail markets from pasars to shopping centres. The second dimension focuses on the extent to which structure or organization has penetrated the workings of the sub-system. This is often a product of history or path dependence where specialization, habits, norms, procedures and practices solidify and persist. It often results in ever-larger organizational structures that sometimes dominate sub-system outcomes, especially in resilience, innovation and flexibility.

Each of the sub-systems mapped in Figure 1 has its own distinctive institutional logic (Thornton et al 2013), its own culture – beliefs, behaviors, values and practices. Each has a stakeholder inspired instinct for survival, and where this is at stake from an adjacent sub-system – complementary, competitive or cooperating – cultural clashes occur. This is more likely to be the case when more than one level is involved – when embedded sub-systems collapse or surge, perhaps through innovative technology, perhaps when a supervening system inspired by changing values rethinks its offerings. Overall, Figure 1 groups, somewhat loosely, the cultures in the mapping of provisioning sub-systems into four broad categories: (1) informal exchange, where structures are yet to emerge perhaps through self-organization, or where regulation including taxation has yet to take root: (2) open exchange, where structures are emerging, entities taking shape, organizations growing all responding to a customer driven, bottom-up approach to assortments of products, services, experiences and ideas: (3) collaborative exchange, where cooperative or collaborative groups form to provide much of the provisioning needs of each community or group, often in rural or remote communities, or in communities inspired to form though mutuality and morality: (4) and prescriptive exchange, where the assortments of goods, services, experiences and ideas are for political or other top-down reasons are prescribed rather than freely chosen.

Each of these four sub-cultures differ significantly in the ways they function, every-day and long term. When they co-exist as is increasingly often the case in the provision of medical or educational services, or as happens when informal exchange exists on the fringe of open or prescriptive exchange, or collaborative exchange systems find themselves competing with large, open exchange networks clashing cultures are dominant issues in the life of all participants. This is particularly the case when the clash is between the value blends - self-interest, mutuality and morality – underlying the formation, growth and emergence of each
sub-system (Bowles 2016). These blends range from strong commitments to self-interest and the dominance of the profit motive, to equally strong commitments to environmental sustainability, to community needs, or to a set of religious beliefs. Because provisioning systems are parts of the everyday life of a human community these clashes reach beyond provisioning systems to challenge the ways people chose to live. Inevitably, these clashes and the ways they are managed must be part of macromarketing thought and practice.

How might these clashes be identified and managed?

Both ways of thinking about the formation, growth and evolution of provisioning systems are needed if we are to understand and respond to the almost inevitable clashes that are likely to arise within and between provisioning systems at all levels. While the existence of clashing cultures in a provisioning system is often a call for immediate help, the first step must be boundary mapping - in time, space and functionality. This is an initial, often fuzzy, framing of the clash and its contexts that sets the stage for all that follows. It is initially fuzzy, for as learning begins and the system dynamics unfold, more aspects come into focus, more levels of system analysis become important, and more connections become apparent. As this continues the boundaries change, shift and become clearer, the participants and stakeholders identified, their actions and intentions easier to anticipate, the complex interacting networks that form and re-form as stakeholders engage with each other in shifting alliances, and which drive system dynamics can be modelled, and possible solutions become clearer. This is a process, not just an immediate action. Both views are complementary and essential.

Central to both views of the formation and growth of provisioning systems – top down and bottom up – are the dynamics of locally inspired self-organization. It is the capacity of human communities almost everywhere to communicate, learn, innovate, cooperate and self-organize, that is the key to influencing, perhaps managing, the evolutionary dynamics of a provisioning system at any level.

The clashing cultures that arise in the formation and growth of provisioning systems can originate at many points in the system – from environmental change, sometimes regulatory, sometimes political, sometimes economic or social; from adjacent, complementary, or competing systems; or within the provisioning system often at multiple levels when the complex dynamics of embedded systems clash not only with each other but with supervening and more deeply embedded systems; or as a consequence of different tensions and interests shaping delivery systems, or stakeholder action fields concerned with struggles for power and influence, perhaps the invention and introduction of new or novel technologies, or the brawls that sometimes erupt over changing and conflicting values and beliefs which threaten destabilization, or as is often the case, the possibilities of increasing path dependence and lock-in. In each situation it is the participant – individual, household, group or entity – response that triggers ongoing self-organization in search of better outcomes. These conflicts may not be threatening survival but are always consequential and disturbing. In short, they must be managed or handled constructively.

Some suggested approaches to the analysis and management of cultural clashes in provisioning systems are set out below:

1. Self-organization – a bottom-up process, where leadership is critical,
2. Cooperation, based on collective intelligence, and collaborative learning,
3. Acculturation, adopting the practices and values of another culture,
4. IAD modelling, based on Ostrom’s (1999) “commons” analyses,
5. Senge’s (2006) archetypal contexts for learning solutions,
6. Negotiation, “The art of the deal”;
7. Opening new dimensions – delivery, stakeholders, technologies and values;
8. An external or higher level imposed intervention,
9. Conflict, ‘lawfare’, and the costs that follow,

The first, self-organization, where the system is enabled to heal itself, to resolve a conflict among cultures, is very often the option of choice. A solution does not have to be centralized. Individual copying, learning and adaptation, informed by free-flowing communication, occurring within ongoing social and economic activity, together with the emergence of leaders, create the necessary internal system dynamics to make self-organization a success. The processes involved however, take time, shared understandings and sensitivities, and may require a re-balancing of costs, opportunities, and objectives, amongst participants. Where each of the stakeholders in a conflict or clashing situation can be persuaded to meet together and listen with care to each other’s points of view, collaborative learning and a form of collective intelligence becomes possible. Several options then open up – acculturation may occur, where one or more of the clashing sub-cultures adopt the practices, values and perhaps the beliefs of others while still retaining their own distinct culture (Berry 2008). It is possible, likely, that a deeper understanding of systemic contexts may help in working with one or more of the archetypal settings noted by Senge (2006), where systemic issues such as the time delays in balancing processes, limits to potential growth, shifting the burden to short term solutions, eroding or weakening goals, escalation of existing pressures and many others create conflict situations as and between provisioning system sub-systems at all levels. A deeper, collectively generated understanding will also play a role in the Institutional Analysis and Design program (McGinnis 2011), initiated by Elinor Ostrom (1999), to diagnose and appreciate the ways the myriad of parts in a provisioning system could and should fit together.

Where collective understanding is limited in a conflict situation, some more formal or structured approach to negotiation may be needed, ranging from Raiffa’s (2002) careful, detailed assessments of win-lose, win-win, two party or multi-party, situations ranging from consensus to arbitration to intervention, to the strategic, power-plays of deal making set out for example in Trump’s work on the Art of the Deal (Trump 2015). When failure is likely, direct conflict is possible where opposing parties attempt to limit the options of others through legal or illegal activism or intervention, through strikes or lock-out management, through the exercise of stakeholder or political power coalitions, and similar moves. In these situations, the costs and benefits need careful assessment in the provisioning system context, both in time and in space, for the consequences can be long-lasting perhaps terminal. It is also possible that opening up a higher level dimension to the provisioning system – a new technology, a major shift in community values, a restructuring of stakeholder power and coalition formation, or new customer groupings – will serve to limit cultural clashes and conflicts, redirecting attention to a search for new opportunities and fresh innovation. External intervention, perhaps from a supervening or adjacent system, perhaps from state or other authority, may be essential. Where all else fails, mediation and peacemaking may be an option.

Although each approach on the list is at least partially different many will be used sequentially in a search for a resolution of a conflict situation. Perhaps beginning with collective intelligence, and then with an initial set of shared understandings self-organization may enable an appropriate response to emerge. If not, then an Ostrom IAD methodology drawing on her core design principles (Wilson 2019) might be used to design an appropriate institutional framework, perhaps exploiting new emerging options in technology, delivery, and stakeholder
involvement to reach negotiated settlements, all helping to resolve complex situations where cultural clashes or conflicts have identified deeper issues that need careful insight into the relevant provisioning system dynamics. The starting point for all these processes is an acceptance of the diversity of individual and collective needs, preferences, values, beliefs to say nothing of individual and collective endowments of economic, social and physical capital. Both ways of thinking about the workings of a provisioning system are essential – an understanding of the aggregate dynamics of formation, growth and evolution combined with an understanding of the implications of diversity in individual and collective preferences, beliefs, social practices, norms and capital endowments.

Conclusion

Where clashing cultures within and between sub-systems exist within a provisioning system the possibility of dysfunctionality within the causal dynamics of the provisioning system as a whole needs to be recognized by system and sub-system stakeholders. Dissention, for example, among individual retailers and shopping centre management may point to deeper concerns about the workings of the shopping centre as a whole, seen as a meso-level provisioning system. The issues may go further and extend to local or regional shopping centres (a macro focus), where worries about access, local regulations, restrictions on opening hours, or relations between retailers – large and small – and shopping centre management may be at the heart of the conflicting views and opinions. Critical complex social mechanisms such as stakeholder action fields, changing customer values, the unexpected impacts of new technologies such as social media, or a restructuring of delivery system functionalities may need constructive change.

Where there is conflict within and between provisioning system networks there is a need for informed action based on the two ways of thinking about provisioning systems – and not just the first, top down mode. The consequences of the issues involved may well be best seen in such an aggregate analysis but will have to be understood and resolved in terms of systemic diversity and its management. While cultural clash and crisis in a provisioning system is challenging and often troubling to resolve, it is an essential part of the evolutionary processes that enable complex, multi-level networks of provisioning systems to form and re-form, to innovate and grow, or sometimes collapse, in environments that are always changing and often extreme (Wilson 2019). Looked at like this, clash and crisis is an essential part of the evolutionary dynamics shaping daily life in every human community.

References


By 2050, safe, secure food supplies will be required to feed 10 billion people (United Nations 2017). However, current Western consumption preferences and food production modes are not equal to this challenge. Intensive farming damages the environment it relies on by degrading soil, using excessive amounts of water and poisoning both human and non-human actors (e.g. pollinators) through pollution (Engling and Gelencsér, 2010, Phillips 2014). Furthermore, food waste is pervasive, in production, distribution, consumption and post-consumption systems (Eriksson, Strid, and Hansson 2015, Graham-Rowe, Jessop and Sparks 2014). Social harm is also endemic in the intensive model. While ‘big agriculture’ offers high returns to investors and lower consumer prices, the system compromises viability of small-scale, non-industrialized, diverse agriculture, and concentrates power in the hands of a few large, transnational agribusinesses (Clapp and Fuchs 2009). Thus, in addition to environmental damage, social damage results from intra- and inter-generational inequity (Belz and Binder 2017). As Layton (2009) points out, if marketing systems “…are poorly adapted … or lack in health, resilience or responsiveness, then growth and quality of life or well-being will be directly affected” (p.84-85). We argue that large scale agri-food systems are subject to all these afflictions. New thinking is required to address system fragility and equity, and to support ‘sustainability-oriented’ innovation (SOI), the focus of this paper.

Macromarketing scholarship has been ahead of the curve in addressing sustainability challenges (e.g. Fisk 1974, Hunt, 1981), however, to date limited attention has been directed at SOI. Kilbourne (2010) argues that sustainability is not business as usual, rather, it is about transformative change. Transformative change challenges hard and soft entities, including institutions, infrastructures, value systems and power structures (O’Brien 2016). However, the nature of innovation required to support transformative change is unclear. This study aims to address these limitations by introducing the SOI literature to macromarketing, and by providing insight into the practices supporting transformative change in food production systems. In the innovation literature, SOI is seen as a systematic process drawing on dynamic interaction between actors and resources, directed at finding new ways to provide for human needs (Carrillo-Hermosilla et al 2010). However, there is little agreement on a definition for SOI. Drawing on commonalities including a triple bottom line (TBL) mission, a deliberate and systematic process, newness to a particular context, improved buyer or user value and a multiple stakeholder view (Adams et al. 2016, Klewitz and Hansen 2014, Xavier et al. 2017) we therefore offer a new definition of SOI for macromarketing as: “The purposive process of creating and diffusing new products, processes and business models into the market in order to provide sustainable social, environmental and economic value for multiple stakeholders within the wider production, distribution, consumption and disposal system.”

While the notion of SOI is rapidly gaining traction, the current literature has two major limitations. First, despite general agreement that current systems are problematic, most studies focus on ‘greening’ those systems, i.e. incremental change. As macromarketers point out, transformative rather than incremental change is needed (e.g. Kemper and Ballantine 2017). However, transformative change is not welcomed by system incumbents, as it is radical, and discontinuous in nature (Christensen et al., 2006), disrupting or destroying accepted technologies and practices (Geels 2010, Markard, Raven, and Truffer 2012, Shove and Walker 2007). The path to disruption is therefore challenged by powerful incumbents, inertia and systems lock-ins. Transformative innovations are therefore relatively rare, and recognisable only in hindsight (e.g. Uber, AirBnB), hence historical, rather than contemporary studies.
dominate (e.g. Christensen 1997, Geels and Johnson 2018). As SOIs seek to transform the dominant social paradigm, even greater challenges are presented. Consequently, such innovations are doubly rare. The second limitation is ambiguity about what sustainability might look like and how innovation might support that, exacerbated by the dominance of technological rather than social perspectives (Adams et al. 2016, Klewitz and Hansen 2014). Notably absent are studies taking a holistic, systems perspective (Xavier, et al. 2017), that integrate technologies and markets (Hansen and Grosse-Dunker 2013), and that consider contemporary SOI practices in their social settings (Klewitz and Hansen 2014). Furthermore, understanding about the nature and practices of important SOI actors, i.e. ecopreneurs, is lacking (Santini 2017). Overall, insight is limited into the processes of both SOI and ecopreneurship from a contemporary, dynamic systems perspective; which is of considerable concern in light of the pressing need to rethink current, unsustainable food systems.

In an effort to address these shortcomings, this study will draw on a case of contemporary SOI from a dynamic systems perspective. It will address the important question: “How might we transition food production systems to more sustainable forms?” Reflecting the emerging nature of the field and the nature of the phenomena (dynamic, real world, involving multiple actors and complex processes) a case study approach is taken (Belz and Binder 2017, Langley et al. 2013, Yin 2013). The empirical domain is the dairy industry of New Zealand. While the dairy industry is historically, economically, culturally and politically important, ‘big dairy’ is challenging New Zealand’s ‘clean and green’ international image. Intensive dairy farming pollutes waterways and ecosystems owing to nitrate run-off and synthetic chemicals, contributes a large volume of waste from single-use plastic packaging, and is a significant greenhouse gas (GHG) contributor (Wright 2015). In its emerging form (concentrated and industrialised vs distributed rural livelihoods) the industry is destructive of its social and ecological setting. In short, it is unsustainable. A case study of one ecopreneur’s efforts to challenge industry orthodoxies informs insight into the process of both ecopreneurship and SOI, highlighting barriers to change, and therefore what actions might be required to support transformation to more sustainable modes of production and consumption.

The research, currently in the field, will make three contributions to macromarketing. First, the study introduces the notion of SOI, adding to the literature on transformative change in marketing systems. Second, it will offer scarce empirical evidence about sustainability-oriented change, supporting theorization of the process of transformative innovation in food marketing systems. Finally, it will contribute insight into contexts other than Europe/ North America, currently lacking (Darnhofer 2015, Markard, Raven, and Truffer 2012). The findings will support policy makers and innovators in the urgent need to transition agri-food systems to more sustainable modes.

References


Using Film Narrative to Enhance Cultural Intelligence for Markets in a Globalized World

Richard S. Lowry, The College of William and Mary, USA
Don R. Rahtz, The College of William and Mary, USA

In today’s globalized business environment it is increasingly important for companies conducting business in different countries to develop sophisticated approaches to Cultural Intelligence, defined as the ‘capability for successful adaptation to new cultural settings, that is, for unfamiliar settings attributable to cultural context’ (Earley and Ang 2003, p. 9). The internet and data sets offer good information, but another particularly useful source comes from critically examining the narratives that a culture tells about itself, in sources such as prose fiction, memoirs, advertising and film (e.g. Hung 2000; Russell Tong, Ja-Shen, Hung-Yen 2013; see Fabe 2014 and Gunning 1999 on film narrative). The value of narrative is widely recognized in psychology, sociology, law, and policy making (e.g. Alexander 2011; Mieke 2017; Mitchell 1980). It has also been used extensively by marketers (e.g. Kniazeva & Belk 2007; Penaloza, Price, and Belk 2013).

Narratives have proven to be of particular importance to researchers in Consumer Culture Theory (CCT). Insofar as stories organize complex relationships between subjectivity, experience, social structure and cultural dynamics, into temporally ordered forms, they serve as powerful modes for making intelligible our sense of self and our place in the world, and how each changes over time (Shankar, Elliott and Fitchett 2009; Ourahmoune 2016; Bal 2017; White 1990). Personal narratives in particular provide longitudinal studies of how individual subjects negotiate tensions between personal agency and social determinants. Such narratives which integrate experiences of consumption and relationships to objects into individual stories, have provided a valuable ‘interpretive tool to aid our understanding of the way consumers structure their consumption experiences and so make sense of this particular aspect of their lives’ (Shankar, Elliott, Goulding 2001: 434; see also Ourahmoune 2016).

As useful as this research has been, it has posed a number of methodological challenges that are especially relevant to understanding cross-cultural and transnational settings. Narratives produced by extended interviews and ethnographic study provide some of the most valuable insights into the motivations, aspirations, expectations and values behind consumer behavior (Shankar, Elliott, Fitchett 2009; Ourahmoune 2016). Their significance is established not by data analysis, but by hermeneutic interpretation that takes consumer narratives as texts produced by the dialogic relationship between researcher and participant subjects (Shankar et. al. 2009; see also Ourahmoune 2016; Clifford, 1988 and 1997). Shankar et.al. (2009) review the practices of “pre-understanding” (literature review, self-reflection, etc.) and post-interview critical interpretation that frame and interrogate the “consensual reality” that emerges from “the inherently social nature” of the encounter. But difficulties persist in, for instance, the tendency of CCT researchers to over-emphasize the importance of consumer experiences and object-relations on identity construction (Shankar, Elliott Fitchett 2009). They have as well been challenged by the need to balance narrator-participants’ claims to individual agency with the effects of more diffuse and yet powerful institutions such as the family, class, and other market and social systems that shape not only personal agency, but our perception and understanding of that agency (Askegaard & Linnet 2011; Shankar, Elliott, Fitchett 2009) Sociologist Pierre Bourdieu’s formulations of praxis, cultural capital, and habitus offer conceptual tools for understanding how individual lived practices simultaneously express personal desires, expectations and aspirations on the one hand, and on the other, values embedded in education,
When it comes to cross-cultural narratives, however, these approaches run up against two difficulties. The first is raised by narrative theory, which emphasizes not just how action is emplotted in sequence but also how even realist narratives unfold in a complex field shaped by elisions, distortions, and displacements that are part of the linguistic, visual, and ideological building blocks of narrative itself (e.g. Brooks 1992). Narratives have a textual or “political [social] unconscious” that operates ideologically, but also as a formal melding of personal and collective fantasy, reaching for symbolic resolutions to what appear to be intractable contradictions and conflicts (Jameson 1981). The logic, even the presence of these unspoken narrative dynamics often is not discernible by readers/viewers/researchers outside of the culture of origin. Just as “systemic and structuring influences of market and social systems . . . [are] not necessarily felt or experienced by consumers in their daily lives,” so too are cultural contexts latent in narrative texts (Askegaard & Linnet 2011: 382).

Narrative film offers a promising source for cross-cultural analysis. As a powerful cultural and economic force in what Bourdieu characterizes as “the field of cultural production,” its very nature as an industry, as well as many of the narratives it tells, stages dramas between individual agency and social/cultural/economic restraints and continuities (Bourdieu 1993). Questions of agency even come to bear on the question of who, exactly, is responsible for any film: custom points to the director, but claims to authorship can be attributed to actors, producers, scriptwriters, etc., or even to actual or targeted audiences (Schatz 1981; Schatz 2010). These issues persist in the formal conventions of lighting, blocking, cinematography and the like, which work to create visuals hierarchies to tell audiences what elements or actors are part of the narrative text, and what serve as context (Gunning, 1999). Alongside that, the photographic detail of the setting, or mise en scene can gesture to other narrative possibilities, backstories, and psychological explanations. In short, narrative films stage individual narratives in an audiovisual field saturated within the diegetic world by objects, dispositions, gestures etc. that both dramatize personal agency and point to the contexts, institutions—the habitus—in which that agency is embedded (e.g. Bourdieu 1977).

If the sheer richness of filmic texts make them useful points of entry into “new cultural settings,” their artifice provides a built-in critical distance to the stories they offer. They at once gather a host of relevant contexts to the story, they present a range of photographically real material, and limit that material to instrumental uses of a story (on contexts, see Askegaard & Linnet 2011). Moreover, as a global industry, many films, especially those made for smaller markets, work to make recognizable their social unconscious—all, to enjoy film, we must be able to make sense of it; to understand it critically invites just the same kind of dialogical “interactive introspection” Shankar et al. identify as a keystone to interpreting interview narratives (2001: 443).

Film narrative does important cultural work on a number of levels. It implicitly organizes time and space into plausible settings; it links actions and consequences in ways that imply theories of cause and effect, it constructs character, and it establishes an often implicit but nonetheless powerful narrative voice that both speaks for the culture it represents, and to readers who are part of that culture (e.g. Jameson 2015; Anderson 1991). Paying attention to how films organize these dimensions allows us to develop a cultural understanding on two levels of meaning: the representational, and the imaginative or ideological, or the textual and the contextual. The first not only directs attention to the social and physical settings in which a narrative unfolds, but as well to how characters are understood to “naturally” fit in those settings and act in certain ways. By asking questions about what is taken for granted in the realistic setting (“of course” parents
love children by serving food, “of course” people in poor neighborhoods spend their time on the street) we can begin to grasp the powerful, if often invisible cultural values that animate a society and the people who live in it.

At the imaginative, or ideological level, we can ask questions about aspirational values: what is it characters in narratives want to do or be and why? What do they expect from day-to-day life? What is the audience being asked to accept as plausible? These questions lead to a further set of considerations, often provoked by narrative conflict: what social, or collective fantasies and desires are “baked” into how the narrative structures conflict (for instance, between family loyalty, individual ambition, or corporate or national loyalty)? At the same time, paying attention to the narrative tension precipitated by conflict can open a window on collective, often unspoken anxieties about social order, economic stagnation, and individual agency. In the end, the marketer and traveler alike are able to gain a great deal of information that will enhance their cultural intelligence and ultimately aid them in servicing the needs of the indigenous market now and in the future.

No single text of course can yield a comprehensive understanding of a culture, but analyzing a range of texts allows researchers to develop a broadly dialogized understanding of how, and in what contexts people construct identities. With this in mind, this paper will focus on several clips from the film Vertical Ray of the Sun (2000), by the Vietnamese director Tran Ahn Hung. The culture of focus is Vietnam. Since Doi Moi was initiated in 1986, Vietnam has become an important trade partner to not only the United States, but many countries around the world (see Shultz 2012; Tho, Trang, and Shultz 2018). Alongside this economic expansion, the country’s colonial past, as well as the two decades of war involving the United States, Thailand, and Cambodia, continues to shape memories and experience today (Nguyen 2016). The film, about three sisters from a “traditional” family living in present-day Hanoi, contains only traces of these past histories. But a close reading of several clips will focus especially on how the youngest sister integrates film and Western rock music into her construction of an identity shaped by the barely visible tensions between family tradition, inchoate sexual yearning, and her embrace, in part through consumption, of a more cosmopolitan habitus. Her improvised dancing to recorded music in an apartment filled with objects of aesthetic, personal, and social value dramatizes how both the impulse toward and precarity of identity construction unfolds in a world saturated with traces of contextual authority, which she both inhabits and ignores. Sorting out the significance of these relations engages the promises and limits of critical interpretation for cultural intelligence.

References


Practising Ethical Consumerism: Using Practice Theory to Analyse Consumer Behaviour Change
Cathy McGouran, The University of Liverpool, UK

Extended Abstract

B: Loads of plastic there (…)

C: …I don’t need you to point out the obvious. I have eyes.

B: (…) The people that follow your blog have eyes too #justsaying

C: (...W)ill you please piss off? I’m having a shit day (...and) I wasn’t going to argue with some waiter about the straw in my drink, that he’d just have taken and put in the bin anyway.

This research contributes both to practice theory and the significant sustainability branch of the Macromarketing agenda (McDonagh & Prothero 2014) by analysing a consumer within her lifeworld through the lens of ethical consumerism. In response to the unsustainability of current consumption patterns (Assadourian 2010), the author is trying to live more ethically and sustainably and consider more macro concerns (political, environmental and societal) in her consumption decisions. She has attempted to alter some of her ingrained practices, the day to day activities that she, for many years, has drawn upon and reproduced (Giddens 1984; Shove and Pantzar 2007; Shove et al. 2012). The contribution informs theory, method, and practice as follows:

1. Contributes to Practice Theory by questioning whether behaviour change is within the power of individual actors alone or requires a more seismic shift in societal structures, attitudes, and beliefs.
2. By conducting an autoethnographical blog, that pulls in questions, comments, and observations from others, the method is extended to encompass engagement from friends and peers that assisted with the researcher's self-reflection and introspection.
3. For those in the business of encouraging consumers to live more ethically or sustainably, understanding that behaviour change may not merely be a matter for the individual consumer but is dependent on society's structures and institutions and will help progress efforts of policymakers to encourage behaviour change from an institutional rather than individual perspective.

Practices consist of norms and ways of doing and saying things (Lindemann 2014; Schatzki 2001; Shove and Pantzar 2007; Shove et al. 2012), and through the performance of these practices, people make sense of the world around them and foster their sense of self (Hargreaves 2011). The study of practices is becoming more prevalent in the Macromarketing literature. It has primarily been used as a theoretical lens for analysing data (Chaudhury & Albinsson 2015; Lindemann 2014; Westberg et al. 2017) but has also been put forward from an ontological perspective (Lucarelli & Giovanardi 2019). Practices are socio-culturally contextualised so, in order for a person to develop more ethical consumption practices, it is crucial to break the personal and shared cultural links associated with current practices and exchange them for remade pro-ethical behaviours. The objective of this research was to expand upon practice theory in order to understand how easy or difficult it is to alter practices and to gather a body of information about the challenges and limitations associated with efforts to change. The practice of ethical consumerism is the mechanism through which this research was conducted.
Because social practice theory focuses on how everyday practices are carried out, it is essential to employ a methodological technique which can observe how such a practice is accomplished. Autoethnography was therefore chosen at the most appropriate method. One of the critical benefits of Autoethnography is the detail and depth a study can achieve, in addition to a heightened empathic understanding and mindful observation of the self (Gustavsson 2007, Gould 1991). It is incumbent on the researcher while engaging in such introspection to pay attention to her experiences, feelings, thoughts, attitudes, and emotions. She must then look inward to assess her impressions and assumptions about them (Gould 1995). Systematic sociological introspection and emotional recall are used to try to understand the experiences through which she has lived.

It has been suggested in the Macromarketing sphere, that consumer behaviour research is too narrow, limited and individualistic in focus and is more concerned with micro contexts (Sinclair 2015). In order to apply to markets, marketing, and society, it is essential however to incorporate both a micro and macro research outlook so that a phenomenon can be understood from different perspectives.

Introspective research itself tends towards the micro; however, it can be used very effectively as a pre-cursor to more macro research. For example, de Coverly et al. (2008) successfully employed introspection in their study of waste and rubbish. Subjective Personal Introspection was used by one of the researchers in order to confront and engage with their personal experiences about waste. Introspection helped the authors consider and identify the critical emergent issues after reflecting on their experiences, which contributed to and fed into the subsequent study design. This process is quite common in introspection, and it is often used as a prelude to further data gathering on a broader scale. Hence, the micro nature of introspection can be successfully utilised as an introduction for research on a more macro scale and of a more traditional macromarketing nature.

An online blog (https://greeningmyroutine.wordpress.com) was chosen as the technique used to record the researcher's practices, experiences, thoughts, and challenges. The Blog had the added benefit of acting as a sharing tool and has resulted in heightened interested in the project among the researcher's friends, peers, and colleagues. Indeed, the opening (heated) quote is an exchange that took place as a result of some photos the author shared online. Also, the blog was supplemented with several more private autoethnographical diary entries. As a method, it is very versatile in that it can be utilised as a single self-reflective case study or expanded to incorporate potentially hundreds of introspective pieces to gain a fuller understanding of a particular macromarketing problem.

Preliminary findings highlight that breaking the links and elements of existing unethical practices, as suggested by Hargreaves (2011) and replacing or re-making them to be more ethical are difficult and challenging. The author has been hindered in three key areas:

1. Current Practices – habits and routines already embedded in everyday life. Unless the author is always vigilant and alert to her ethical efforts, slipping back into old habits and routines is something that can and does happen with some regularity (particularly over time).

   I'm an idiot. I impulse bought some potato cakes because they were on offer (I buy a lot of things on offer!) and clearly they were going to arrive wrapped in plastic. I had just spent ages painstakingly going through my shopping looking for the "goodest" alternative and fell at the final "flash sale" hurdle.

2. Institutions - i.e. the structures that govern our worldviews and characterize a society or “humanly devised constraints that shape human interaction” (North
Life is not set up to make ethical living easy. Searching out plastic free or more ethical options has been hindered by social conventions in a society that has developed to value economic growth and a reliance on convenience and brevity. This ideology of consumption and focus on material well being is one that is inherent within the Dominant Social Paradigm (Kilbourne et al. 1997).

Is it any wonder I spent a few days questioning why I'm even bothering with any of my efforts? It's as if every decision I make, that is intended to be a more sustainable or environmentally friendly choice, has other unintended negative consequences that I was unaware of.

3. Resources – The author has found that being ethical is proving both expensive and time-consuming.

As you can see, we've made quite the few swaps but I do worry that the costs associated are about to spiral. When it's a few pence here and there it's not too noticeable but it all does add up and we're certainly not growing money trees in our back garden (I can't even grow spinach remember).

In using practice theory to highlight the mechanism of ethical behaviour change, it has been emphasised that such change is challenging because of current practices, institutions, and resources. The political, legal and social structures that oversee the operation of markets make ethical and sustainable consumption more challenging. If we are to consider the importance of Macromarketing to public policy and decision makers and to how we represent impacted publics such as consumers and environmentalists, it is vital that we obtain as rich and deep and understanding of a phenomenon as possible so that we fully grasp the complex interactions of markets, marketing, and society. Institutions, however, are the product of the history of a community (Layton 2009) (institutional practice perhaps) and also have the power to influence their future trajectory. Therefore, policymakers and those interested in more ethical and sustainable consumption should consider what structural changes ought to be made in order to encourage and aid practice change among consumers.

References


The Power of Authenticity: The Influence of Corporate Social Responsibility
Authenticity on Consumer Judgments

Soyoung Joo, Siena College
Elizabeth G. Miller, University of Massachusetts Amherst
Janet S. Fink, University of Massachusetts Amherst

Background

Social researchers claim that consumers proactively search for authentic businesses, brands, places, and persons (Alexander 2009; Alhouti, Johnson, and Holloway 2016; Beverland 2009; Cohen 1988; Holt 2002; Spiggle, Nguyen, and Caravella 2012). Authenticity and consumers’ quest for authenticity have been considered as a new business imperative and one of the foundations of contemporary marketing (Brown, Kozinets, and Sherry 2003; Gilmore and Pine 2007; Kadirov, Varey, and Wooliscroft 2014). Further, it was proposed that such universal quest for authenticity in the marketplace echoes society’s general macromarketing sensitivity (Kadirov et al. 2014). Indeed, marketing researchers show that authenticity, as an important variable of interest, predicts important consumer judgments such as purchase intentions (Napoli, Dickinson, Beverland, and Farrelly 2014), brand extension success (Spiggle et al. 2012), and message receptivity (Labrecque, Markos, and Milne 2011). However, while authenticity is “inherently a macromarketing concept that is linked to how marketers and consumers view themselves and their own status in society” (Kadirov et al. 2014, p. 73), authenticity research in marketing predominantly focuses on a micromarketing agenda (i.e., how to manipulate the authenticity concept to maximize business bottom-line) rather than on a macromarketing agenda (i.e., how to increase the well-being of others).

Further, while organizations have been involved in various corporate social responsibility (CSR) endeavors to eliminate any harmful effects and increase its long-run beneficial impact on society (Mohr, Webb, and Harris 2001) as a means to address stakeholder concerns, such endeavors have become the target of increased skepticism among stakeholders (e.g., employees, consumers, and media). As such, perceptions of authenticity have gained attention in the CSR literature in an attempt to reconnect business and society (Mazutis and Slawinski, 2014). In the current research, CSR authenticity refers to “the perception of a company’s CSR actions as a genuine and true expression of the company’s beliefs and behavior toward society that extend beyond legal requirements” (Alhouti et al. 2016, p. 1243).

In the domain of macromarketing, existing literature argues that solely self-centered businesses will not be patronized in a sustainable manner unless they sincerely care about others’ needs (Kadirov et al., 2014; Varey 2011). However, little is known in regard to the effects of others’ perceptions of CSR authenticity (i.e., a brand’s ethical endeavors to genuinely care about the well-being of others) as well as its nature and dimensionality in the marketing literature in general and in the macromarketing literature in particular. A recent CSR authenticity study identified seven dimensions (i.e., community link, benevolence, congruence, commitment, transparency, reliability, and broad impact) of CSR authenticity and showed that CSR authenticity indeed positively influences various consumer judgments (e.g., organization reputation, consumers’ attitudes toward a brand, and consumer reactions to the brand’s CSR programs) (Joo, Miller, and Fink 2019). Table 1 shows the seven dimensions of CSR authenticity and their definitions.
Table 1. Seven consumer-based CSR authenticity dimensions and their definitions

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Community Link</td>
<td>The degree to which stakeholders perceive CSR initiatives are connected to their communities.</td>
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<tr>
<td>Reliability</td>
<td>The degree to which stakeholders perceive the CSR program actually does what it promises to do.</td>
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<tr>
<td>Commitment</td>
<td>The degree to which stakeholders perceive the organization as dedicated or steadfast in the CSR initiatives as opposed to adjusting initiatives to meet current trends.</td>
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<tr>
<td>Congruence</td>
<td>The degree to which stakeholders perceive an alignment between an organization’s CSR efforts and the vital core of its own business.</td>
</tr>
<tr>
<td>Benevolence</td>
<td>The degree to which stakeholders perceive CSR initiatives as altruistic as opposed to commercial (profit seeking).</td>
</tr>
<tr>
<td>Transparency</td>
<td>The degree to which stakeholders perceive CSR decisions, practices, outcomes, etc. to be open and available to public evaluation.</td>
</tr>
<tr>
<td>Broad Impact</td>
<td>The degree to which stakeholders perceive that CSR initiatives benefit numerous recipients.</td>
</tr>
</tbody>
</table>

Whereas Joo et al.’s (2019) work successfully tested and validated the scale, their conceptualization of CSR authenticity was mainly tested with three CSR programs of one single brand (i.e., the National Football League). As such, further research is required to identify if the effects of CSR authenticity would further translate to different contexts. In addition, further research to understand the dimensionality of CSR authenticity is needed in that there have been inconsistent measures in the previous literature: as a unidimensional construct in Alhouti et al. (2016) and as a multidimensional construct in Joo et al. (2019).

As such, the objectives of the current research were to investigate (1) if the influence of consumer perceptions of CSR authenticity remains consistent across different types of sports (e.g., football, baseball) and (2) further examine the multidimensionality of the CSR authenticity construct by showing distinctive effects of each of the seven proposed CSR authenticity dimensions across two studies. In doing so, this research provides insights for how marketers can adapt their strategies to create authentic CSR programs in a business context where consumers increasingly care about authenticity (i.e., a macromarketing agenda) and are less interested in self-interested brands that solely pursue their bottom line (i.e., a micromarketing agenda) (Holt 2002; Kadirov et al. 2014).

To achieve these objectives, a 2 (context: football, baseball) x 2 (CSR authenticity: high, low) between-subject design (study 1) and a 4 (context: football, baseball, basketball, soccer) x 2 (CSR authenticity: high, low) between-subject design (study 2) were employed using hypothetical sport teams. A hypothetical CSR program in the context of sport was used in the current research. CSR in sport has become a particular research interest because of the inherently unique features of sport (i.e., (1) mass media distribution and communication power, (2) youth appeal, (3) positive health impacts, (4) social interaction, (5) sustainability, (6) cultural understanding and integration, and (7) immediate gratification benefits) that make it a natural vehicle for CSR (Smith and Westerbeek 2007, pp. 8-9). Further, sport organizations...
provide an appropriate context for researching both CSR and authenticity due to their built-in social responsibility to give back and support their communities (i.e., a macromarketing agenda) while also pursuing business bottom-line (i.e., a micromarketing agenda) (Mazutis and Slawinski 2014; Siegfried and Zimbalist 2000).

Each of the seven dimensions of CSR authenticity (i.e., community link, benevolence, congruence, commitment, transparency, reliability, and broad impact) were manipulated in the scenarios to create a perception of high authenticity (e.g., the program evidenced sustained commitment of 20 years, had broad impact by helping large number of children, and altruistically motivated to help others) or low authenticity (e.g., short-term commitment of 1-month, fewer people helped, and more self-motivated, financial focus).

Based on the previous CSR authenticity literature (Joo et al., 2019), the current research posits that an organization’s genuine endeavors to care about others (i.e., CSR authenticity) positively influences organization reputation, consumers’ attitudes toward the organization, and consumer reactions to its CSR program. More formally, the current research proposes the following eight hypotheses across different sport contexts: CSR authenticity positively influences organization reputation (H1), consumers’ attendance intentions of the organization’s future events (H2), positive word of mouth communication for the organization or its events (H3), media consumption of the organization’s events (H4), attitudes toward the campaign (H5), positive word of mouth communication for the campaign (H6), intentions to support the campaign (H7), and feelings of gratitude toward the organization (H8).

STUDY 1

Pretest. A pretest was conducted prior to the main study to ensure that the anticipated manipulation of the level of CSR authenticity would work with our potential participants through online survey software. A total of one hundred and ninety five national consumers (age ranged from 19 to 75 years old; 52.3% male; 71.3% Caucasian) were paid $0.20 for their participation using Amazon MTurk. The respondents were randomly assigned to one of the four conditions in a 2 (context: football, baseball) x 2 (CSR authenticity: high, low) between-subject design: football, high CSR authenticity (n = 53), football, low CSR authenticity (n = 47), baseball, high CSR authenticity (n = 49), baseball, low CSR authenticity (n = 46). Participants viewed a description of a CSR program corresponding to the condition they were assigned and then completed a questionnaire that included a 21-item seven-dimension measure of CSR authenticity using 1 to 7 scales as well as questions to assess our eight dependent measures (e.g., organization reputation, attendance intentions, positive word of mouth intentions for the organization), covariates (sport involvement, personal connection, gender) and demographic items. The sport context was manipulated in the beginning of each program description and seven dimensions of CSR authenticity were manipulated in the program descriptions (see Table 2 for the manipulation scenarios).
Table 2. The Manipulation Scenarios

**High CSR Authenticity Condition**
The Blue Dragons are a **local football (baseball) team** in your community. Their mission statement and policies express the **team’s desire to be good corporate citizens**. The team’s website has information about the team’s efforts to help the community. The Blue Dragons’ “Let’s Play” campaign is the team’s local social responsibility program that builds on the **team’s mission of addressing important social issues within the local community**. Since the Blue Dragons’ Let’s Play campaign was **launched 20 years ago**, the Let’s Play campaign has been promoting the importance of youth health and fitness with local partner organizations and schools in the local community. For **more than 20 years**, the Blue Dragons’ “Let’s Play” campaign has been consistently encouraging kids to go out and play in order to make their lives healthier and has **helped more than 1.5 million kids’ physical well-being** through partnerships with more than 1,000 local schools and charitable organizations.

**Low CSR Authenticity Condition**
The Blue Dragons are a **local football (baseball) team** in your community. As stated on their website, their mission statement and policies express the team’s desire to provide high quality entertainment. **Recently**, the Blue Dragons developed the “Let’s Play” campaign to try to **increase ticket sales by generating positive press** through the program. The Blue Dragon’s “Let’s Play” campaign was launched this year and is designed to promote the importance of youth health and fitness with partner groups. The Blue Dragons’ “Let’s Play” campaign is scheduled to run for **one month this year only**, as the organization **does not want to commit too many financial resources to the project**. While the Blue Dragons do not plan to formally assess the program’s impact, they anticipate that their efforts will **help about 100 school children** in the area.

Manipulation Checks. A two-way analysis of covariance (ANCOVA) was conducted to identify whether or not the different levels of CSR Authenticity and sport types had significant impact on CSR Authenticity. The level of CSR Authenticity (high, low) manipulation had the intended effects.Respondents in the high CSR Authenticity condition reported higher mean scores of CSR Authenticity than those in the low CSR Authenticity condition (Mhigh = 5.59 vs. Mlow = 4.81; F(1, 188) = 34.71, p < .001), indicating successful manipulation for the level of CSR Authenticity. There was no significant difference in CSR Authenticity between the two types of sport context (Mfootball = 5.20 vs. Mbaseball = 5.20; F < 1). The interaction was also insignificant (F < 1).

Main Study. A total of 1209 usable surveys were collected from Amazon MTurk; participants were paid $0.30 for their participation (age range: 18-76; 43.8% Male; 78.4% Caucasian). The respondents were randomly assigned to one of the four conditions in a 2 (context: football, baseball) x 2 (CSR authenticity: high, low) between-subject design: football, high CSR authenticity (n = 324), football, low CSR authenticity (n = 300), baseball, high CSR authenticity (n = 287), baseball, low CSR authenticity (n = 298). One of the four condition descriptions from the pretest was randomly presented to the respondents and they completed questionnaires with the same measures as the pretest (see Table 2 for the manipulation scenarios).

Data Analyses. Scale Reliability. Internal reliability test indicated adequate internal reliability as shown by reliability coefficients for all measurement items ranging from .849 to .965 based on the cutoff standard (.70).
Manipulation Checks. A two-way ANCOVA confirmed that the manipulation had the intended effects. Respondents in the high CSR authenticity condition reported higher mean scores of CSR Authenticity than those in the low CSR authenticity condition (Mhigh = 5.74 vs. Mlow = 4.88; F(1, 1202) = 352.409, p < .001). All bivariate correlations among dependent variables are statistically significant at p = .05 level. An examination of these simple correlations suggests that there were no issues concerning multicollinearity since none of the predictor variables had intercorrelations greater than 0.74 (Hair, Anderson, Tatham, and Black 1998).

Test of Hypotheses. To examine the influence of CSR authenticity on consumers’ behavioral intentions toward a sport organization and its program, a MANCOVA was employed using the level (1 for the high CSR authenticity condition, 2 for the low CSR authenticity condition) of CSR authenticity and the type of sport (1 for football, 2 for baseball) as independent variables, three covariates (sport involvement, personal connection, and gender), and eight dependent variables. The results revealed that there was a significant difference between the two levels of CSR authenticity on the eight dependent variables (Wilks’ = .870, F = 22.32, p < .001). As we expected, the high CSR authenticity condition reported more favorable evaluations towards the program and organization than the low CSR authenticity condition (see Table 3). The two types of sports also had a significant impact on dependent variables (Wilks’ = .981, F = 2.82, p < .01). Participants reported more favorable evaluations regarding the baseball scenario (compared to the football scenario) (see Table 4). However, there was no significant interaction effect on any of the eight dependent variables between the level of CSR authenticity and the type of sports on CSR authenticity (Wilks’ = .997, F = .521, p = .842). As such, Hypotheses 1-8 were supported. Study 1’s results also show that the seven dimensions of CSR authenticity influence various consumer outcome variables differently in two different sport types (football, baseball), indicating the multidimensionality of the CSR authenticity construct (see Tables 5 and 6).

### Table 3. Tests of Group Mean Differences between High and Low CSR Authenticity

<table>
<thead>
<tr>
<th>DV (H)</th>
<th>Group Mean(^a) (Standard Deviation)</th>
<th>Results</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>High CSR Authenticity</td>
<td>Low CSR Authenticity</td>
<td>(F)</td>
<td>(Sig.)</td>
</tr>
<tr>
<td>OR (H1)</td>
<td>5.39 (0.40)</td>
<td>4.72 (0.41)</td>
<td>133.909</td>
<td>0.000</td>
</tr>
<tr>
<td>AI (H2)</td>
<td>5.39 (0.49)</td>
<td>5.10 (0.49)</td>
<td>17.933</td>
<td>0.000</td>
</tr>
<tr>
<td>WO (H3)</td>
<td>5.58 (0.42)</td>
<td>5.06 (0.43)</td>
<td>73.641</td>
<td>0.000</td>
</tr>
<tr>
<td>MC (H4)</td>
<td>5.19 (0.48)</td>
<td>4.96 (0.48)</td>
<td>11.444</td>
<td>0.001</td>
</tr>
<tr>
<td>AC (H5)</td>
<td>6.24 (0.47)</td>
<td>5.54 (0.47)</td>
<td>110.327</td>
<td>0.000</td>
</tr>
<tr>
<td>WC (H6)</td>
<td>5.54 (0.44)</td>
<td>4.90 (0.49)</td>
<td>70.672</td>
<td>0.000</td>
</tr>
<tr>
<td>IS (H7)</td>
<td>4.90 (0.49)</td>
<td>4.63 (0.50)</td>
<td>14.736</td>
<td>0.000</td>
</tr>
<tr>
<td>GT (H8)</td>
<td>5.61 (0.44)</td>
<td>5.06 (0.45)</td>
<td>75.237</td>
<td>0.000</td>
</tr>
</tbody>
</table>

*Note. H = hypothesis. DV = dependent variable. OR = organization reputation. AI = attendance intentions. WO = positive word of mouth communication intentions toward the organization. MC = media consumption intentions. AC = attitudes toward the campaign. WC = positive word of mouth communication intentions toward the campaign. IS = intentions to support the campaign. GT = feelings of gratitude toward the organization.*

*a. Based on estimated marginal mean*
### Table 4. Tests of Group Mean Differences between Football and Baseball

<table>
<thead>
<tr>
<th>DV</th>
<th>Group Mean (Standard Deviation)</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Football</td>
<td>Baseba</td>
</tr>
<tr>
<td>OR</td>
<td>4.99 (0.04)</td>
<td>5.12 (0.04)</td>
</tr>
<tr>
<td>AI</td>
<td>5.10 (0.05)</td>
<td>5.39 (0.05)</td>
</tr>
<tr>
<td>WO</td>
<td>5.20 (0.04)</td>
<td>5.44 (0.04)</td>
</tr>
<tr>
<td>MC</td>
<td>5.00 (0.05)</td>
<td>5.15 (0.05)</td>
</tr>
<tr>
<td>AC</td>
<td>5.80 (0.05)</td>
<td>5.98 (0.05)</td>
</tr>
<tr>
<td>WC</td>
<td>5.16 (0.04)</td>
<td>5.38 (0.05)</td>
</tr>
<tr>
<td>IS</td>
<td>4.70 (0.05)</td>
<td>4.84 (0.05)</td>
</tr>
<tr>
<td>GT</td>
<td>5.24 (0.04)</td>
<td>5.43 (0.05)</td>
</tr>
</tbody>
</table>

*Note.* DV = dependent variable. OR = organization reputation. AI = attendance intentions. WO = positive word of mouth communication intentions toward the organization. MC = media consumption intentions. AC = attitudes toward the campaign. WC = positive word of mouth communication intentions toward the campaign. IS = intentions to support the campaign. GT = feelings of gratitude toward the organization.

a. Based on estimated marginal mean

### Table 5. Summary of the Influence of the Seven CSR Authenticity Dimensions in the Football Context

<table>
<thead>
<tr>
<th>DV</th>
<th>CL</th>
<th>RE</th>
<th>CM</th>
<th>CG</th>
<th>BN</th>
<th>TR</th>
<th>BI</th>
</tr>
</thead>
<tbody>
<tr>
<td>OR (H1)</td>
<td>n.s.</td>
<td>***</td>
<td>n.s.</td>
<td>***</td>
<td>n.s.</td>
<td>n.s.</td>
<td>n.s.</td>
</tr>
<tr>
<td>AI (H2)</td>
<td>***</td>
<td>***</td>
<td>n.s.</td>
<td>***</td>
<td>n.s.</td>
<td>n.s.</td>
<td>n.s.</td>
</tr>
<tr>
<td>WO (H3)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
<tr>
<td>MC (H4)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
<tr>
<td>AC (H5)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
<tr>
<td>WC (H6)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
<tr>
<td>IS (H7)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
<tr>
<td>GT (H8)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
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<td>***</td>
</tr>
</tbody>
</table>

*Note.* CL = community link. RE = reliability. CM = commitment. CG = congruence. BN = benevolence. TR = transparency. BI = broad impact. OR = organization reputation. AI = attendance intentions. WO = positive word of mouth communication intentions toward the organization. MC = media consumption. AC = attitudes toward the campaign. WC = positive word of mouth communication intentions toward the campaign. IS = intentions to support the campaign. GT = feelings of gratitude toward the organization.

***. p < .0001, **. p < .001, *. p < .05, n.s. = not significant, a. negative effects.

### Table 6. Summary of the Influence of the Seven CSR Authenticity Dimensions in the Baseball Context

<table>
<thead>
<tr>
<th>DV</th>
<th>CL</th>
<th>RE</th>
<th>CM</th>
<th>CG</th>
<th>BN</th>
<th>TR</th>
<th>BI</th>
</tr>
</thead>
<tbody>
<tr>
<td>OR (H1)</td>
<td>n.s.</td>
<td>**</td>
<td>n.s.</td>
<td>*</td>
<td>***</td>
<td>n.s.</td>
<td>n.s.</td>
</tr>
<tr>
<td>AI (H2)</td>
<td>**</td>
<td>**</td>
<td>*</td>
<td>***</td>
<td>**</td>
<td>n.s.</td>
<td>n.s.</td>
</tr>
<tr>
<td>WO (H3)</td>
<td>*</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
<tr>
<td>MC (H4)</td>
<td>*</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
<tr>
<td>AC (H5)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
<tr>
<td>WC (H6)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
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<tr>
<td>IS (H7)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
<tr>
<td>GT (H8)</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
<td>***</td>
</tr>
</tbody>
</table>
**Note.** CL = community link. RE = reliability. CM = commitment. CG = congruence. BN = benevolence. TR = transparency. BI = broad impact. OR = organization reputation. AI = attendance intentions. WO = positive word of mouth communication intentions toward the organization. MC = media consumption. AC = attitudes toward the campaign. WC = positive word of mouth communication intentions toward the campaign. IS = intentions to support the campaign. GT = feelings of gratitude toward the organization.

***. \( p < .000125 \), **. \( p < .00125 \), *. \( p < .00625 \), n.s.. not significant, a. negative effects.

**STUDY 2**

A second study using a 4 (context: football, baseball, basketball, soccer) x 2 (CSR authenticity: high, low) is planned in order to replicate our findings from study 1 and further examine the multidimensionality of the CSR authenticity construct by showing distinctive effects of each of the seven CSR authenticity dimensions on consumer outcomes.

**Conclusion**

What do consumers want from marketing? Marketers realize that the sole pursuit of self-interest in business is no longer what consumers or society desire from brands and businesses (Holt, 2002; Kadirov et al., 2014). Consequently, solely self-centered businesses will not be patronized in the long run if they do not sincerely care about others’ needs (Kadirov et al., 2014; Varey 2011). As such, a better understanding of the role and nature of CSR authenticity in marketing in general and in macromarketing in particular is deemed imperative. Across two studies, this research shows the significant effects of CSR authenticity on consumer judgments toward an organization and its CSR program across four different sports. In addition, the current research supports the multidimensional nature of the CSR authenticity construct by showing the distinctive effects of each of the seven CSR authenticity dimensions on various consumer judgments.

By showing the powerful effects of CSR authenticity on consumer judgments toward the organization as well as its CSR program, this research adds support for the significant role of authenticity in the marketplaces that reflects society’s general macromarketing sensitivity. In doing so, the current research fills the knowledge gap in the macromarketing literature by adding empirical evidence of the effectiveness of a brand’s sincere endeavors to care about others (i.e., a macromarketing agenda) to be sustainably patronized by stakeholders such as consumers (Kadirov et al., 2014; Varey 2010, 2011) in the context of CSR. In particular, by taking a macromarketing perspective, we show why organizations and marketers should care about authenticity in their marketing practices and show how they can incorporate CSR authentically rather than just manipulate consumers’ authenticity perceptions solely to achieve their micromarketing goals (e.g., Becker, Wiegand, and Reinartz 2019). Accordingly, this research may help organizations and marketers when they initiate, design, implement, and revise their CSR programs so that they can adequately respond to society’s general macromarketing sensitivity and also maximize their endeavors to increase the well being of others and their long-running benefit to society. For example, the multidimensional CSR authenticity scale enables CSR practitioners to evaluate the score for each dimension for different CSR programs, thus they can compare the scores for different CSR programs and understand which sub-dimension(s) account for consumer judgments toward an organization’s macromarketing (e.g., positive word of mouth intentions toward the CSR program, intentions to support the CSR program) as well as micromarketing goals (e.g., purchase intentions) for each program. By understanding the role of CSR authenticity and using the individual scores of different dimensions, organizations and CSR managers can decide if they would need to reinforce somewhat higher authentic dimensions or rather strengthen somewhat less authentic dimensions for each CSR program for their intended consumers.
References


Macromarketing and Ashoka U’s Changemaker Learning Outcomes
Robert Mittelman, Royal Roads University

The objective of this session is to explore the learning outcomes associated with macromarketing. Beginning with an introduction to Ashoka U, a network of educators and post-secondary institutions dedicated to social innovation and positive social change, I will provide an overview of their ongoing work related to changemaker learning outcomes and explore connections between macromarketing and changemaking.

Learning Outcomes
Learning outcomes are clear, plain language descriptors of knowledge and performance tasks. Often the learning outcome will indicate what specifically will be assessed to determine success. Ideally, a learning outcome should be measurable and achievable. Learning outcomes guide the selection and coordination of appropriate content, learning activities, and assessment strategies that promote the overall learning process. Learning outcomes bring transparency, fairness, and flexibility to curriculum design, delivery, and assessment.

Ashoka U’s Changemaker Learning Outcomes
Ashoka U seeks to create a thriving, global movement of higher education institutions embedding social innovation skillset and mindset development as a core part of a student’s learning journey. Ashoka U staff and the extended network have been developing a changemaker learning outcomes framework. They define a changemaker as “someone who is intentional about solving a social or environmental problem, motivated to act and creative” (Ashoka U, 2019). With this framework, they aim to offer a high-level overview of qualities critical to successful changemaking. The framework outlines the kinds of mindsets (Changemaker Identity, Self Awareness, Applied Empathy, Inclusivity, & Comfort with Ambiguity), knowledge (The Ethics of Social Change, Tools for Social Change, Working Knowledge of System and Cultural Context) and skills (Building Relationships of Trust, Systems Thinking, Creative Problem Solving, Persuasive Communication, Enabling Collaborative Leadership) that are critical for changemakers to cultivate.

Connections to a Macromarketing Education
While Shapiro’s (2012) examination of macromarketing teaching materials does not address any systematic overview of common learning outcomes, it does consolidate the themes of macromarketing including multiple areas that are directly related to changemaking. Additionally, there is not much in terms of a consolidation or analysis of syllabi or research on learning outcomes in macromarketing. Radford, Hunt, and Andrus (2015; 470) identify “developing students’ decision-making skills” and “understanding marketing as a provisioning system” as learning outcomes of a macromarketing education and Peterson’s (2012) textbook on sustainable enterprises includes learning objectives for each chapter as another possible starting point for a discussion of general macromarketing learning outcomes.

What are the learning outcomes of a macromarketing education? What mindsets, knowledge, and skills do we try to install in future macromarketers? What can we learn from Ashoka U’s changemaker learning outcomes?

References Available Upon Request
World Of Foodcraft: Foraging, Game-Play, And Mindfulness

Emily M. Moscato, Saint Joseph's University, USA
Charlene A. Dadzie, University of Southern Alabama, USA
Joshua D. Dorsey, California State University Fullerton, USA

Introduction

Food is central to survival and the progress of civilization. Early humans were reliant on cooperative food acquisition through optimal foraging in order to gain the calories needed for cognitive development (Anderson, 2014). In modern times, foraging has taken on new meaning as individuals break from marketplace norms in sourcing food and goods (Guillard & Roux, 2014; Nguyen, Chen, and Mukherjee 2014). Foraging manifests in various ways, with distinct reasons, and can provide an abundance of insight to understanding and adapting food systems to account for macro environmental and social changes. This research dives into our complex relationship with food by exploring acquisition, consumption, and disposal undertaken at the periphery of societal norms through the practices of foraging. It asks the question, what can we learn from foraging activities that can help connect individual food choices to societal food system issues?

From simple beginning, food foraging evolved into purposeful agriculture and complex marketplace systems. Prior to the Industrial Revolution, the persistent toil of food production, distribution, and preparation had been the mainstay of economies and employment. Using the United States as an example, in 1790, farmers represented 90 percent of the US labor force (Spielmaker, 2018); in 2017, on-farm employment accounted for only 1.3 percent of US jobs (USDA, 2018). Technology and infrastructure has shifted food into the realm of the invisible. In the US, food away from home (the food service industry) and food at home (the food retail industry) account for roughly equal proportions of the food marketing system, supplying $1.46 trillion worth of food in 2014 (USDA, 2017). At the same time, estimates of food waste are as high as 40% of the food supply. In developed countries, most of this waste occurring at the consumer level; households, restaurants, and stores discard food that is hauled away or disappeared down a garbage disposal with little consequence (Block et al, 2016). For a significant amount of the world’s population, majority of food supply and its disposal is in the hands of the few, distancing consumers from food systems.

As an action, foraging is defined as the search from place to place for things to eat or use. For the purposes of this research, we limit foraging to food and divide the practice into two forms that occupy the ends of the food value chain. Wild food foraging (gathering edible vegetation, hunting, and fishing) focuses on the food production end, and it eliminates the market control on the growing and processing of food. Discarded-food foraging (gathering discarded-food from retailers, commonly through “dumpster diving” or searching bags or items left on the curb) focuses on the food value chain’s disposal boundary, and it removes the market control of selling to the end user. Practitioners of foraging counter mainstream society expectations, positioning foragers as outsiders, and by the nature of this positioning, foragers must become more mindful in their performances as they prepare for, hunt, and uncover “treasure” in the form of wild or unwanted food. This in turn creates more a mindful relationship to food—it’s acquisition, consumption, and disposal. From this perspective, the macro food system becomes a personalized, game-play activity where mindfulness can assist in combatting obesity through a contribution to food wellbeing. This paper argues that inherent to foraging activities is the gameful experience (Ermi and Mäyrä 2005) which motivates participation, supports alternative economies, and increases mindfulness of food consumption.

267
**Theoretical Background**

**Consumer Wellbeing**

In the fight against obesity, consumer wellbeing and its associate, food wellbeing, offer ecological views on how individuals are internally and externally influenced in their relationship with food (Block et al, 2011). The dynamic construct of wellbeing is explored through the perspectives of hedonic wellbeing and eudaimonic wellbeing (Ryan and Deci, 2001). These viewpoints have select overlapping antecedents, mechanisms, and outcomes, but they take on two different positions on what constitutes wellbeing. It is argued that pleasure can be an ally in promoting food wellbeing through mindful savoring the food experience and can lead to reducing quantity consumed (Batat et al, 2018; Cornil and Chandon 2016). Generally, mindful attention promotes self-regulation, leading to greater enjoyment and wellbeing (Petit et al., 2016; Ryan and Deci, 2001).

**Game-play**

Related to wellbeing is the concept of play. Play is valuable component of culture. Huizinga states in his seminal *Homo Ludes*, “all play means something” (1949, 1). Play performs a pivotal role in learning, development, creativity, and in many instances, changing behavior. Play and games enable us to grapple with changes in ourselves, relationships, and society in a separate space that provides protection and permits greater risk taking (Ermi and Mäyrä, 2005; Gordon 2009). While these activities occur in a space apart, the knowledge gained during these activities carries over into everyday life and interactions in play can have significant impact on real world decision making. Games are goal-oriented play (ludus; Caillois, 1961) and have particular mechanics that provide means of enticing and maintaining interest of players through interactions which give a sense of progress and sustain motivation. Using multiple qualitative data sources, we explore the motivations, practices, and outcomes of foraging anti-consumers.

**Methodology**

Interviews, participant observations, and online communities were used to explore engagement in foraging across a range of participants. The exploratory nature of this study demanded a qualitative approach to identify a broad range of factors that foragers perceive to influence their experience and decision making. As a first stage, data gathering from the field included participant-observations in two states, 15 informants participated in short-form interviews during foraging events, and three individuals who participated in discarded food foraging contributed to in-depth interviews. For analysis, this first stage used grounded theory approach focused on understanding foraging activities, their meaning, and motivations for participation. The second stage encompassed sampling online content from Instagram to explore gameful nature employed by the wild and discarded food posters. Social media provide more natural conversation by community members without the presence of the researchers possibly influencing the discussions. Instagram was chosen because its visual nature and the ability to write at length in post captions. Moreover, the social comparison that is associated with Instagram (highlighted by the saying “do it for the gram”) lends itself to game-play context. After initial data gathering, images and captions were analyzed using iterative coding approach. The multiple methods permitted a broad scope of factors to be identified and thus saturation of themes could additionally be validated.

**Findings**

Capitalizing on the sustainable cycle of consumption framework (Brosius et al., 2013) and game-play immersion model (Ermi and Mäyrä, 2005), we conceptualize the motivations, practice, and outcomes of foraging game-play model.
Motivations. The level of involvement with foraging ranges among participants. Motives for participating include experiential adventure, self-reliance, and anti-consumption ideology.

Story, Rules, Space. Game-play structure is demonstrated within the foraging activity as performers must also rely on a different set of rules and a new narrative for interacting with their community and space.

Immersion. The practice of foraging asks participants to immerse themselves in their surroundings in a new way that enhances mindfulness, as well as connections to physical space. Those who obligate are transported into the role of an “outsider” during the performance and creating a sense of heroic journey.

New orientation. The consequences of the practices are observed in new orientations towards food, space, and consumption; these newfound alignments cultivate wellbeing by promoting greater pleasure, autonomy, competency, and relatedness.

Discussion

Using game-play design demonstrates the learning potential situated in experiential food practices. Fortuitously, this additional understanding may be leveraged by marketers and public policy makers to strengthen consumer intrinsic motivations towards a more mindful relationship with food, their immediate environment, and global food system. Moreover, the exploration of foraging through game-play allows insights into how consumers are motivated to change marketplace rules for their own betterment and in the process become more mindful of their diet, consumption practices, and their impact on personal and planet wellbeing. Through foraging, consumers gain skills and knowledge that enables greater self-reliance, while also connecting consumers to food and sustainability causes.

The mundaneness of food comes from its necessity and our food habits. We eat every day. That requirement creates bounded rationality—we satisfice when it comes to food decisions. Mindfulness about food and eating removes this monotony and creates self-awareness and consciousness around food choices. There is want of greater transparency and concerns of sustainability have increased consumer interactions with the food system, through asking more questions about the sources of our food and creating more awareness of the problems of food waste. Foraging takes these journeys into the food system a step further through interventions by consumers that modern societies have reserved for institutional work—whether it be farming or sanitation management. Foraging disrupts social norms of access and consumption. It creates a new system for its practitioners; moving the mundane into the world of play and mindfulness.

References


How do consumers behave during Intercultural Service Encounters in Lebanon?
The case of Syrian refugee employees
Beatriz de Quero Navarro, Universidad Loyola Andalucia, Spain
Karine Aoun Barakat, Université Saint Joseph de Beyrouth, Lebanon
Clifford J. Shultz II, Loyola University Chicago, USA
Rafael Araque Padilla, Universidad Loyola Andalucia, Spain
Maria Jose Montero Simo, Universidad Loyola Andalucia, Spain

Introduction
Lebanon is the country with the highest number of refugees per capita, when including Palestinians and other refugees who were present in the country before the beginning of the Syrian conflict. According to UNHCR there are 948,849 registered Syrian refugees in Lebanon, however, the number of non-registered refugees is substantial after the Lebanese government instructed the UNHCR in May 2015 to temporarily stop the registration of the new arrivals.

Lebanon embodies an already complex social and cultural context where the political and economic competition have historically fostered a variety of intercultural tensioned encounters. At the center of these social debates nowadays, is the competition between Lebanese and Syrian labor force, which is indeed an added factor to the hostility between the two communities (Masri and Srour 2014, Lenner and Schmelter 2016, Ceyhun 2017). Another main indicator of this social tension which has reached institutional spheres, and has captured the attention of international aid organizations, are the curfews imposed on Syrian refugees in some municipalities (Betts, Ali, and Memişoğlu 2018).

The market reality of Lebanon makes a privileged context to be studied under the light of Macromarketing. Economic growth in the Lebanese market that ensures also the inclusive development of the refugee populations that are contained in it presents a problem of analysis of the marketing systems, which can play a crucial role “to drive constructive engagement as a new marketing synthesis and to make the global agora/market a benevolent place” to those that are displaced by war conflicts in the MENA area (Shultz 2007).

Understanding how specifically the services marketing system is affected by the rejection of the Lebanese consumer towards Syrian employees in service businesses is the main objective of this study. In this sense, the Macromarketing approach will allow us to envision the trade exchange beyond “the isolated trade between individuals seeking mutual benefit”, but instead the following model has the intention to capture conceptually the complex patterns of exchange behavior involving two cultures and communities with a history of conflict, the Lebanese and the Syrian, as the main actors of a unique social matrix in which the service marketing system is embedded (Layton 2011).

Context in Lebanon
The legal status of Syrian Refugees in Lebanon is complex and ambiguous. Lebanon is neither party to the 1951 Convention relating to the Status of Refugees, nor does it have any national legislation dealing with refugees. It wasn’t until October 2014 that Lebanon’s Council of Ministers adopted a comprehensive policy on Syrian displacement, with the explicit goal to decrease the number of Syrian refugees in Lebanon by reducing access to territory and encouraging return to Syria (Janmyr 2016).
Moreover, the Lebanese labor market policies placed a restrictive “pledge not to work” over UNHCR registered Syrian refugees. This policy introduced a big change in comparison to the historical bilateral work agreements between the two countries (1991, 1993), that had allowed reciprocal freedom of movement, residence, and ownership. As an inheritance of that agreement, nowadays Syrian refugees are only welcome to work in the agricultural, construction, and cleaning sectors (Betts, Ali, and Memişoğlu 2018). Also, Syrian refugees have been severely affected by funding shortages in the global humanitarian response (Lenner and Schmelter 2016).

Hence, most Syrian refugees work as informal laborers, whereby 92% of workers do not have a contract. Around 72% are hired on an hourly, daily, weekly or seasonal basis; only 23% are paid a regular monthly salary. As a result, the average income of Syrian refugees is significantly lower than the minimum wage in Lebanon (Masri and Srour 2014).

A generalized social dissatisfaction and rejection towards the refugee community have been reported among the Lebanese population who expressed that refugees have “a very negative impact” (55%) and “a somewhat negative impact” (35%) on the economy of the country. Lebanese also shared that refugees have “a very negative impact” (46%) and “a somewhat negative impact” (46%) on social cohesion (The World Bank Group 2017).

Taking into account the historical, social, and legal context, this study aims to address the question: How are these perceptions affecting the Lebanese consumer behavior towards service businesses that employ Syrian refugees?

This type of research is in line with the efforts that highlight the need for urban engagement in the refugee crisis in the frame of the 2030 Agenda for Sustainable Development, that recognizes the central role that cities play in building safe, inclusive, and resilient societies and in managing displacement. In this sense, local governments and municipalities play a central role, but also other stakeholders from the private sector can help to fill the gaps in the successful inclusion of the refugee population (Brandt and Henderson 2017).

Specifically, we focused on the services sector after the recommendations of the International Labor Organization for the NGOs to promote micro-enterprises and productive self-employment by enhancing access to micro-finance for Lebanese and for refugees in non-competing sectors, as well as to facilitate the entrance to the labor market through job referrals and links with the financed Lebanese employers (Masri and Srour 2014). Also, the inclusion of the Syrian employees in the service sectors enhances the visibility of this community in Lebanon, which can lead to a more proactive rejection from Lebanese consumers.

**Model proposal**

We propose a model to study how the Lebanese consumer ethnocentrism, animosity, and perceived cultural distance towards Syrians affect the expected quality of the service and ultimately the willingness to consume at a service business that employs Syrian refugees (Figure 1).
Although the constructs in the model have been traditionally used to study individual behavior and cognition processes, this study is part of a greater project that under a Macromarketing perspective aims to understand how the values, perceptions, and trade logics of the Lebanese consumers towards the Syrian employees shape the collectively created economic value of the retail exchange among the former. This will affect the decision making and the strategies of bigger entities of the marketing systems, either businesses, NGO’s, civil institutions, and ultimately the public policy made by the Lebanese government (Layton 2019).

Also, this study lies on the relationship explanation of the marketing systems where we are interested in identifying what social mechanisms as: cooperation, between Lebanese employers and consumers and Syrian employees; commitment, of the Lebanese citizen towards protecting their labor market; trust, between the Lebanese and Syrian people who has an intense and recent history of conflict; or communication, with brands, but also with the government about employment public policy, are crucial to link the micro-choices of consumers to Macromarketing system realities (Domegan et al. 2016).

**Constructs on the model: micro-choices that lead to Macro decision-making**

In order to know how values as protectionism, patriotism, and socio-economic conservatism have an influence on the decision making of the Lebanese consumer when they encounter a Syrian employee in a retail business, the construct of consumer ethnocentrism has been included in the model of study (Shimp and Sharma 1987).

Lebanese consumers have shown a strong preference for products manufactured in developed or western countries (Ahmed et al. 2012). For those ethnocentric consumers who in the case of Lebanon, tend to be females, less educated, and come from lower income levels, ethnocentrism has been found to predict willingness to buy (Ben-Mrad and Kozloski-Hart 2014). However, ethnocentrism and the acculturation to the global consumer culture unevenly impacts subcultures and religious communities within Lebanon. Both Lebanese-Christian and Lebanese-Muslim consumption patterns exhibit different cultural resistant consumer behaviors (Cleveland, Laroche, and Hallab 2013).
Especially relevant to the study of such a complex context as the Middle East, the historical relationships between Syria and Lebanon should be taken into account to understand the social matrix in which the economic exchanges are embedded. The concept of consumer animosity has tried to capture the complexity of the political and historical interaction between two or more given countries that can translate into a consumer rejection of some products, businesses, or brands.

The role of consumer animosity in the MENA region after the Israeli-Lebanese war in 2006 (Ben-Mrad, Mangleburg, and Mullen 2014) and in the Arab world after the Iraqi war in 2003 (Rice and Wongtada 2007) throw examples of boycott towards products from the United States. In our case, we will explore the Lebanese consumer animosity towards a service delivered by a Syrian employee.

Along these lines, the literature about how consumers behave during intercultural service encounters (Sharma, Tam, and Kim 2012) exemplifies another way to look at ethnocentric or boycotting consumer behavior during the experience of purchase. Specifically, in the context of Lebanon, there is a rapid increase in the interactions between customers and employees with diverse cultural backgrounds, which is termed as intercultural service encounter. The results from the analysis of the intercultural services encounters will not only shed light on the individual values and behaviors of the consumer, but will also reflect the trade logics and the trade roles that mediates through exchange the retail marketing system reality in Lebanon (Layton 2019).

A central concept in the intercultural services encounters is the Perceived Cultural Distance (Sharma and Wu 2015) that in this case will be analyzed between the Lebanese and the Syrian cultures. This construct will allow us to explore how different Lebanese consumers feel from Syrian and how this will enrich the interpretation of the animosity results.

According to existing literature, all the former perceptions have been found to be influential factors that have an impact on the perceived quality of the service, as well as on the consumer satisfaction after the purchase experience (Sharma, Tam, and Kim 2012). Our model focuses on understanding to what extent the aforementioned perceptions have an influence on the expected quality of the service and the willingness to buy in the case of a novel inclusion of the refugees in the workforce in Lebanon.

A 42 items questionnaire was built to include measures for all the former constructs. Consumer ethnocentrism was captured through Klein’s (2002) short version of Shimp and Sharma’s (1987) CETSCALE and consumer animosity through Klein’s (1998) original items. We measured Perceived Cultural Distance with the five items from Sharma and Wu (2015) as used by Ang, Liou, and Wei (2018). A 5 items reduction of the 5 dimensions from SERVQUAL scale (Parasuraman, Zeithalm, and Berry, 1988) was utilized to measure the expected quality of the service. Finally, Klein’s (1998) modification of the Darling and Arnold (1988) items to measure the willingness to buy was included.

Forward

The data collection for a statistically random sample of Lebanese consumers in Beirut will take place during the Spring 2019.

The aim of our findings is to help better understand the perceptions towards Syrian refugees that affect the Lebanese consumer decision making on willingness to buy in service businesses. The model outcomes will contribute to the analysis of the current and future changes in the marketing systems in Lebanon after the Syrian refugee influx and their inclusion in the Lebanese workforce as employees in the services sector.
More holistically, these results will help us describe the flows and inequalities of income and employment among communities in Lebanon, and so will reveal formal and informal networks of exchange between Syrians refugees and different religious groups and economic segments in Lebanon (Layton 2019).

The implications of this study aim to shed light into a comprehensive framework that applies to refugee situations from non-camp environments; it is, to contribute with scientific insight to the decision making of the city stakeholders of Lebanon towards the Global Compact of Refugees (UNHRC) from a Macromarketing perspective.

References


Barriers and Facilitators for Mixed Reality Experiences in Marketing

Dr Suha Omar, Senior Lecturer in Marketing, De Montfort University, Leicester
Tracy Harwood, Professor of Digital Culture, Institute of Creative Technologies, De Montfort University, Leicester

Extended Abstract

Advancements in technology ecosystems of software, platforms and devices are fuelling virtual, augmented and mixed reality trends and creating a fundamental shift in user engagement and interaction, and the way customers experience services and their surroundings (Jung and tom Dieck, 2017). While virtual and augmented reality could revolutionise how firms create and market their products and services and the way customers will shop, emerging mixed reality technological capabilities could further enhance virtual experiences (Deloitte, 2017). Organisations and researchers are starting to pay greater attention to VR, AR and MR because of their potential to deliver novel and personalised experiences to users and customers (tom Dieck et al., 2016). This potential is mirrored in the forecasted exponential growth of the VR, AR and MR market which is expected to reach a combined value of US$ 80 billion by 2025 from US$ 4.56 billion in 2017 (Reuters, 2018; Bellini et al., 2016).

Within the reality-virtuality continuum proposed by Milgram & Kishino (1994), augmented reality and mixed reality represent various levels of interaction with elements of both worlds. While virtual reality immerses users in a virtual environment isolated or unconnected from the real world, augmented reality displays and superimposes digital information and content on users’ immediate surroundings and views of the real world (Hilken et al., 2017). Mixed reality allows the virtual and real world to merge, blend together to form new environments wherein virtual and physical objects can cohabit and interact with one another in real time (Koontz & Gibson, 2002). In a recent study, Flavián et al. (2018, p. 3) added a new distinctive dimension ‘pure mixed reality’ within the reality-virtuality spectrum where “digital content is merged into the real world so that both digital and real content can interact in real-time”. In a pure mixed reality world, one might not be able to distinguish ‘between what is real and what is virtual in a given scene’ (Collins et al., 2017).

Until recently, technology offered limited capabilities to generate pure mixed realities but has made considerable advances in VR and AR in ecommerce, in store shopping, tourism etc. Some indicative AR examples are Converse’s AR shoes app which superimposes footwear through the smartphone on online shoppers’ feet, Ikea’s AR catalogue app which allows shoppers to visualise furniture in their home and Topshop AR fitting room app which allows customers to superimpose clothes on their image and style themselves. However, technologies such as MagicLeap One and Microsoft’s Hololens are seen as breakthrough devices in development of mixed reality experiences and opens up the possibilities to create pure mixed realities which integrates virtual and real objects in real time (e.g., Flavián et al., 2018) within a multidimensional spatial field of view.

Against this background, marketers are trying to understand how to utilise MR technologies to create unique experiences for their customers and gain competitive advantage. However, as with any new and emerging technology, it is of great importance to understand the barriers and facilitators for creating mixed reality experiences. Hence, this paper aims to explore the obstacles and enablers to mixed reality experiences in marketing contexts.

Currently, an obvious barrier is the high cost for both organisations to develop MR applications and customers to acquire MR devices (Armstrong, 2018). According to Pettey (2018, p), “the biggest barrier to wide adoption of immersive technologies is the lack of good user experience design”. Because of the nature of MR, there are challenges linked to cybersecurity, privacy,
trust, authenticity of digital data (Deloitte, 2017). Other challenges relate to digital fatigue and social rejection, or that privacy and safety concerns may lead to immense regulation (Armstrong, 2018).

On the other hand, mixed reality is enabled by the development of technological and communication infrastructure and equipment (e.g. HMD Microsoft HoloLens), digital content and the ability of the application to facilitate social presence and user engagement and create entertainment, educational and economic value (Verhagen et al., 2011; tom Dieck et al., 2018).

References


Brand Externalities: A Taxonomy
Shoaib M. Farooq Padela
Ben Wooliscroft
Alexandra Ganglmair-Wooliscroft

Abstract
Brands are ubiquitous and adorn contemporary marketing systems. Contradictory consumer behaviour, pro-brand and anti-brand, also comprise a stark contrast in the system. This paper builds on the social consequences of branding and posits brand externalities as meaning lead discrepancies and symbolic spill-overs igniting social mechanisms detrimental to the integrity of the social system. Brand externalities are a social output alongside the assortment of brands in contemporary marketing systems. We propose a taxonomy of brand externalities and their social consequences on brand consumers themselves, their immediate others, future others and general others. This stakeholder orientation sets a future research agenda and calls for redefining brand management from the system’s perspective.

Keywords
brand externalities, anti-brand movement, marketing system, brand management, ethics, macromarketing

Introduction
The notion of the social consequences of marketing (Nason, 1989) and externalities (Mundt, 1993) is not new in macromarketing scholarship. Macromarketing is the study of exchange systems (Meade & Nason, 1991) and market failure occurs in almost every market exchange (R. G. Harris & Carman, 1983). Though market failure occurs for many reasons, their ubiquity indicates inefficiency and imbalance in goal achievement of exchange actors leading to consequences often unforeseen and undesirable.

Exchange is a central concept in macromarketing theory (Meade & Nason, 1991) and marketing systems are validated as exchange networks (Layton, 1989). “Brands are semiotic marketing systems that generate value for direct and indirect participants, society, and the broader environment, through the exchange of co-created meaning” (Conejo & Wooliscroft, 2015, p. 287). Brands embody relational exchange (Valta, 2013). They are the socio-cultural phenomena (Heller & Kelly, 2015) and symbolic structures which may cause the system to fail if not taken into account (Kadirov & Varey, 2011). Layton (2015, p. 306) recommended to recognize “the significance of meaning and symbol generation in the study of marketing system formation, growth and adaptation.”

“The business of marketing is to place meaningful assortments in the hands of consumers” (Alderson, 1965, p. 27), and the output of a marketing system is an assortment that may be tangible or intangible (Layton, 2007). Brands merge tangible commodities with intangible meanings as representational and cultural texts – transactional as well as transformational in character (Moore & Reid, 2008; O'Reilly, 2005). Brands as intangible assortments tend to diversify over time which indicates changing market conditions and opportunities for sellers and buyers contributing to quality of life. Simultaneously, it raises concerns about market imbalances (Layton & Duan, 2015) and sustainability (Peterson, 2012). This calls for a study of branding from the system’s perspective and the impact brands have, favourable and/or unfavourable, on society.
Layton (2015) described when formation and growth of individual micro-marketing systems takes place, the action fields are generated by each of these micro-systems and the field participants stir certain social mechanisms into action within the action fields. These social mechanisms may be positive facilitating emergence of meso and macro marketing systems. These social mechanisms may also be negative leading to the system failure, because corruption is prevalent in the choices of interdependent field participants, called “greedy bastards” (Holbrook, 2013). Brands can be thought of as micro-systems, in the complex network of meso and macro marketing systems, which trigger anti-branding movements as social mechanisms due to corrupt manipulation and/or incompetent handling of meaning infrastructures by field participants.

Branding is discussed within several contexts in macromarketing such as: branding ideology (Levy & Luedicke, 2013), nation branding (Kerrigan, Shivanandan, & Hede, 2012; O’Shaughnessy & O’Shaughnessy, 2000), place branding (Askegaard & Kjeldgaard, 2007; Brown & Campelo, 2014), historical discourse on branding and evolution of brand meaning (Eckhardt & Bengtsson, 2010; Gao, 2013; Petty, 2011), and impact of system elements on brands and brand management (Berthon & Pitt, 2018; Gao, 2012; Kravets, 2012). Discussion on the social consequences of brands and branding is scarce in macromarketing literature. The call for sustainable practices in aggregate marketing systems (Peterson, 2012) makes it imperative to highlight that brands do pose certain social consequences characterised with market trade-offs, often adverse. This needs integration of concepts like unseen costs of human choices (Nason, 1989), miscalculations in exchange equation (Mundt, 1993), market imbalance concerns due to assortment diversity (Layton & Duan, 2015) and social mechanisms in action fields generated by field participants (Layton, 2015) in contemporary brand systems. The conceptualisation of brand externalities offers the development of a framework for connecting stakeholders beyond the brand exchange sphere; better management of contemporary brand systems as dynamic marketing systems; addressing moral and ethical dilemma, sustainability concerns and complex choices encountered by public policy makers.

In this article, we propose a taxonomy of brand externalities building a framework for redefining brand management from the system’s approach. First, we construe the dynamics of contemporary brand systems indicating systems-wide discord emerging from branding practices and integrate the extant externalities literature. Then, we delineate symbolic spill-overs from branding as brand externalities. And finally, we explicate the micro-macro relationship of brands and society and discuss the implications for theory and practice.

**Dynamics of Contemporary Brand System**

Brands are a social and perceptual process where firms merely own the trademarks but the brands reside in consumers’ brand schema (Berthon & Pitt, 2018). Brands can be thought of as a platform for mediation of marketplace interactions (Bertilsson & Rennstam, 2018; Eckhardt & Bengtsson, 2010). They are the outcome of an active negotiation between firm-projected brand identity and consumer-attributed brand meaning. Contemporary branding literature regards a brand as a dynamic social phenomenon that attunes multiple stakeholders co-creating brand value (Brodie, Benson-Rea, & Medlin, 2017; Hatch & Schultz, 2010; Mena, Hult, Ferrell, & Zhang, 2019; Merz, He, & Vargo, 2009; Payne, Storbacka, Frow, & Knox, 2009; Schroeder, 2009). This is in line with stakeholder-unifying, value co-creation philosophy (Lusch & Webster, 2011; Vargo & Lusch, 2004) and the “organic view of the brand” (Iglesias, Ind, & Alfaro, 2013, p. 148). Brands are extensively studied in marketing literature, summarized in Table 1.
<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Fundamental Idea (brands as)</th>
<th>Relevant Literature</th>
</tr>
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<tbody>
<tr>
<td><strong>For firms</strong></td>
<td>a strategic and financial asset</td>
<td>Kapferer (2008)</td>
</tr>
<tr>
<td></td>
<td>a medium for product differentiation</td>
<td>Willmott (2010)</td>
</tr>
<tr>
<td></td>
<td>relationship partners</td>
<td>Davies and Chun (2003)</td>
</tr>
<tr>
<td></td>
<td>product coordinators for utility enhancement</td>
<td>Keller (1998)</td>
</tr>
<tr>
<td></td>
<td>competitive shields by:</td>
<td>Fournier (1998)</td>
</tr>
<tr>
<td></td>
<td>1. reducing price elasticity of demand and</td>
<td>Fournier and Alvarez (2012)</td>
</tr>
<tr>
<td></td>
<td>2. increasing advertising elasticity of demand</td>
<td></td>
</tr>
<tr>
<td></td>
<td>source of legal protection</td>
<td>Gillespie, Krishna, and Jarvis (2002)</td>
</tr>
<tr>
<td></td>
<td>source of personal expression</td>
<td>Chernev, Hamilton, and Gal (2011)</td>
</tr>
<tr>
<td><strong>For consumers</strong></td>
<td>a meaning and identity system for self-construal</td>
<td>Berger and Heath (2007)</td>
</tr>
<tr>
<td></td>
<td>a symbol of wealth and status</td>
<td>Escalas and Bettman (2005)</td>
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<tr>
<td></td>
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<td>Nelissen and Meijers (2011)</td>
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</table>
Brands are commodified meanings (Hatch & Rubin, 2006) exchanged within marketing systems and dissemination of meaningful information is associated with both positive and negative externalities (Bomsel, 2013). Debate on social impact of branding is ongoing (Algesheimer, Dholakia, & Herrmann, 2005; Hearn, 2008; Holt, 2002, 2006; Huber, Vogel, & Meyer, 2009; Isaksen & Roper, 2008; Kozinets & Handelman, 2004; Roper & Shah, 2007) and ethical concerns are raised frequently (Caccamo, 2009; Fan, 2005; Palazzo & Basu, 2007; Story & Hess, 2010; Syed Alwi, Muhammad Ali, & Nguyen, 2017). Research has criticized the superficiality of consumer culture and expressed discontent for the mechanisms that provide brands with virtually infinite power (Bertilsson & Rennstam, 2018; Holt, 2006; Muhr & Rehn, 2014).

Brands can elicit externalities on brand enthusiasts and others beyond their imagination. Goldman and Papson (2006) argued that branding serves merely short-term capitalist interests but wreak long-term backlashes on culture and values that underpin any market. Branding may destroy civic and social values by discursive closure and organized hypocrisy (Bertilsson & Rennstam, 2018). It is traced throughout history that brands are used in different contexts and involve several stakeholders (Eckhardt & Bengtsson, 2010; Iglesias et al., 2013); it can be argued that branding inflicts transgressions far deeper than previously conceived. Table 2 summarizes criticism on branding practices.
Table 2: Criticism on branding practices.

<table>
<thead>
<tr>
<th>Literature</th>
<th>Criticism</th>
</tr>
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<tbody>
<tr>
<td>Holt (2002)</td>
<td>Brands “allow companies to dodge civic obligations” (p.88)</td>
</tr>
<tr>
<td>Holt (2006)</td>
<td>Brands are capitalists’ weapon to profit from consumer anxieties</td>
</tr>
<tr>
<td>Ashton and Pressey (2011)</td>
<td>Branding enables corporates to hold an anti-competitive stance and cause several regulatory challenges by:</td>
</tr>
<tr>
<td></td>
<td>• commanding excessive prices</td>
</tr>
<tr>
<td></td>
<td>• creating artificial barriers to entry</td>
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<tr>
<td></td>
<td>• imposing undue restrictions on supply chain partners</td>
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<tr>
<td></td>
<td>• causing consumer disempowerment by limiting choice and instigating confusion</td>
</tr>
<tr>
<td>Rennstam (2013)</td>
<td>Branding consumes discursive human resources – values</td>
</tr>
<tr>
<td>Goldman and Papson (2006)</td>
<td>Branding causes ideological instability and referential confusion</td>
</tr>
<tr>
<td>Klein (1999)</td>
<td>Brands have colonized social life</td>
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<td>Mumby (2016)</td>
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These realities of contemporary branding system spark the anti-brand sentiments and demand new conceptualization of brand authenticity (e.g. Kadirov, Varey, & Wooliscroft, 2014). When brands are suspected of deceitful actions like discursive closure and hypocrisy (Table 3), the essential focus should be on what is being downplayed, suppressed or neglected altogether. This would usually indicate an untoward aspect, the externalities, well beyond the control of perpetrators, which connects the micro-exchange partners to the macro-system and alters the holistic character of the brand exchange outcome.
Table 3: Examples of Discursive Closure and Organized Hypocrisy

<table>
<thead>
<tr>
<th>Discursive Closure (Deetz, 1992)</th>
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| **Description:** Discursive closure is evident when brands tend to draw attention away from critical ethically and morally questionable activities of the organization and portray a fragmented favourable image of the corporate (Bertilsson & Rennstam, 2018). Here, branding becomes a tool to marginalise certain characteristics of social reality and depict utopian fantasy (O’Reilly, 2006).

Example: Dove’s campaign for real beauty from Unilever is a striking example which has been criticized extensively (Bissell & Rask, 2010; Johnston & Taylor, 2008; Murray, 2013). The campaign uses women empowerment rhetoric and challenges the hegemonic ideology of beauty by using real women instead of professional models to unshackle women from prevalent stereotypes and seek social change but, at the same time, reinforces the oppressive ideology that commissions physical and psychological self-improvement of women by promoting consumption and active engagement with the brand. It was denounced to be an attempt to conceal corporate aims by associating social problems with corporate image. The contradictory narrative Unilever delivers with Dove distracts the attention from its other brands like Fair & Lovely and Slimfast and the debate of why social problems like unrealistic standards of beauty and physical-being emanated and continues to flourish.

<table>
<thead>
<tr>
<th>Organised Hypocrisy (Brunsson, 2002)</th>
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</table>
| **Description:** Organized hypocrisy occurs when brands try to authenticate corporate legitimacy by decoupling symbolic manifestations from actual corporate actions (Bertilsson & Rennstam, 2018). In other words, branding is used as a safeguard when corporate-talks and corporate-dos are strained in opposite directions.

Examples: McDonald’s became a hyped centre of censure when it expanded into hospitals promoting an HFSS (high in fat, sugar and salt) diet directly within children’s spaces. A
cardiologist expressed his scepticism and remarked, “They are preparing future patients for me down there” (Belkin, 1987).

Similarly, when HSBC, claiming to be concerned about the planet, invests in an organization accused of causing deforestation, it becomes a high grade hypocrite causing devastating repercussions of their investments on environment (Woolley, 2010).

Modern marketing systems are characterised with a behavioural spectrum, at the extreme ends of which lie pro-brand and anti-brand consumers and activists. Anti-brand consumers, also regarded as critical reflexive consumers (Østergaard, Hermansen, & Fitchett, 2015), do not downright resist consumption but exhibit defiance against conventional consumption practices. These consumers demonstrate complex consumption behaviour and pose the greatest challenge for brand management as they are no longer under a firm’s control and have orchestrated a reconfiguration of power within the marketing system (Thompson, 2004).

The internet has empowered critical reflexive consumers on social, economic, technological and legal fronts (Kucuk & Krishnamurthy, 2007). It acts as a facilitative tool for activism by providing common forums to aggregate individual actions and create a strong collective identity (Kozinets & Handelman, 2004; Minocher, 2018). These forums morph into anti-brand communities and escalate anti-brand expressions into anti-brand social movements, in particular, against iconic global brands and transnational corporates (Hollenbeck & Zinkhan, 2006). Iconic brands face negative double jeopardy (Kucuk, 2008); thus, global brands like McDonald’s, Nike, Starbucks etc., suffer ceaseless criticism regardless of adopting marketing concept religiously.

Anti-branding initiatives like Adbusters magazine and publications like The Conquest of Cool (Frank, 1997), No Logo (Klein, 1999), Culture Jam (Lasn, 2000), Fast Food Nation (Schlosser, 2001) etc., mark the era when the modern anti-branding movements boomed and confronted consumption culture openly. The Nestle infant formula controversy (Boyd, 2012), the McLibel case (Botterill & Kline, 2007), the Brent Spar scandal (Zyglidopoulos, 2002), Ford Pinto fires (Gioia, 1992) and the like have set the stage for anti-brand activists to spur an ideological tension in the consumption system. Even the brands regarded as highly authentic are not shielded and face negative repercussions of brand scandals (Guèvremont & Grohmann, 2018).

Despite the dilution of some of their brand power, iconic brands can withstand such dissonance and anti-branding discourse for them is ambivalent (Cova & D'Antone, 2016; Luedicke, Thompson, & Giesler, 2010). A large body of consumers lie somewhere midway at the behavioural spectrum and exhibit a contradictory demeanor. These consumers are aware of ethical and moral issues and possess negative attitudes towards some brands, but they decouple product functionality and brand symbolism to cope with branding transgressions (Salzer-Mörling & Strannegård, 2007). They exhibit accommodation processes like neutralization, interiorization, and adhesion to legitimize and depoliticize consumption (Cova & D'Antone, 2016). Consequently, brands remain centre stage in modern consumer culture.

It does not mean anti-branding movements are futile and iconic brands have achieved immortality. It highlights the gap in marketing theory and branding practices where concerns like corporate social responsibility (Torelli, Monga, & Kaikati, 2012), branding and sustainability (Dauvergne & Lister, 2012), conscientious corporate brands (Rindell, Svensson, Mysen, Billström, & Wilén, 2011) and social and consumer wellbeing (Kipnis et al., 2013)
repeatedly spring up without conceptualizing brand externalities and addressing social impact of branding systemically.

Contemporary brand system has become highly moralised (Salzer-Mörling & Strannegård, 2007) and inundated with ethical discourse, where critical reflexive consumers are entangled as brand enthusiasts and anti-brand activists (Kozinets & Handelman, 2004). They are engaged in the moral conflict and social tension of their identity work defending their respective ideologies (Cova & D’Antone, 2016; Luedicke et al., 2010). It makes understanding contemporary brand system ever more baffling and brand management further complicated, but also offers an opportunity to explore the externalities brands and branding inflict upon society, addressing the phenomena from a system-wide stakeholder perspective, at the micro and macro level.

**Fundamentals of Externalities**

Externalities are addressed in several ways in macromarketing literature. Table 5 summarizes differences in the conceptualisation of externalities in macromarketing.

Economists unanimously restrict the concept of externalities as adverse effects of exchange on parties external to the price mechanism i.e. third parties and society. Nason (1989), under the umbrella focus of macromarketing, adapted the concept into marketing discipline arguing that externalities can accrue to the exchange actors too as they are the costs and benefits external (not considered) to the calculus of market transaction. Mundt (1993) followed the adaptation and continued marketers’ discourse of externalities under the exchange paradigm. Nason (1989) and Mundt (1993) corroborated that exchange and externalities are fundamentally tied and the expanded idea would assist in developing theory, social intervention methods and public policy for rectification of miscalculations by transacting parties.

Our thesis follows the inclusive idea proposed by Nason (1989) and Mundt (1993) to understand the unseen costs of human decisions pertaining to brands in the contemporary brand system. To sum up, we regard externalities as positive and/or negative effects (Mundt, 1993), occurring in production and consumption situations (Hartwick & Olewiler, 1986); reiterated as uncalculated costs and benefits of exchange (Mundt, 1993) accruing to the transacting parties themselves and/or party external to the transaction (Mundt, 1993; Nason, 1989).

**Table 4: Conceptual Disparity for Externalities in Macromarketing Literature**

<table>
<thead>
<tr>
<th>Authors</th>
<th>Description</th>
<th>Terminology</th>
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<tbody>
<tr>
<td>R. G. Harris and Carman (1983)</td>
<td>Side effects of consumption or production accruing to the subject of exchange (first party)</td>
<td><strong>Internalities</strong></td>
</tr>
<tr>
<td>Nason (1989)</td>
<td>Foreseen and unforeseen effects of market transactions accruing to both first and third party</td>
<td>Social consequences</td>
</tr>
<tr>
<td>Author</td>
<td>Year</td>
<td>Description</td>
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<td>------------------------</td>
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</tr>
<tr>
<td>Mundt</td>
<td>1993</td>
<td>Uncalculated outcomes of exchange accruing to both first and third party</td>
</tr>
<tr>
<td>Mundt and Houston</td>
<td>2010</td>
<td>Expected and unexpected effects of consumption on non-users (third party)</td>
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<td></td>
<td></td>
<td>Unexpected effects of consumption on users (first party)</td>
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<td></td>
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<td>Identifiable effects of market choices to others (third party)</td>
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<td></td>
<td></td>
<td>Unforeseen effects of market choices to exchange actors (first party)</td>
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<tr>
<td></td>
<td></td>
<td>Unforeseen effects of market choices to others (third party)</td>
</tr>
<tr>
<td>Cadeaux</td>
<td>2000</td>
<td>Expected and unexpected effects of consumption on non-users (third party)</td>
</tr>
<tr>
<td>Laczniak</td>
<td>2017</td>
<td>Unforeseen effects of market choices to exchange actors (first party)</td>
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<td></td>
<td></td>
<td>Unforeseen effects of market choices to others (third party)</td>
</tr>
<tr>
<td>Lusch</td>
<td>2017</td>
<td>Massive unseen costs and rewards of exchange</td>
</tr>
<tr>
<td>Redmond</td>
<td>2018</td>
<td>Unanticipated costs of exchange born by exchange parties (first party)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unanticipated costs of exchange born by non-transacting parties (third party)</td>
</tr>
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The primary social cause of externalities is argued to be the prevalence of market mentality causing erosion of community (Swaney, 1981) where the individuals’ responsibility to themselves supersedes their responsibility to society (Wheaton, 1972). Marketing theory agrees with the social and individual goal conflict as consumer behaviour is primarily “guided by the principle of self-interest” (Nason, 1989, p. 244). Externalities appear largely due to poorly defined property rights (Baumol & Oates, 1988; Coase, 1960; Demsetz, 1964; Vatn & Bromley, 1997). Buchanan (1973) notes that all potential exchange interactions involve some transaction costs and Dahlman (1979) affirms that externalities occur solely due to transactions costs that encompass imperfect information and cause welfare losses.

Bator (1958) identified that many externalities possess the character of a public good – a common property characteristic (Ayres & Kneese, 1969), they possess joint consumption interaction (Buchanan, 1973). This led to categorizing externalities as public and private based on their undepletable and depletable nature respectively (Baumol & Oates, 1988; Hartwick & Olewiler, 1986). Private externalities are typically found in micro-exchange sphere. They don’t spill over to a large scale and barely constitute policy implications. Public externalities, causing public bad, are macromarketing issues and major policy concerns for inducing socially optimal behaviour.

Traditionally, economists classify externalities as technological (non-pecuniary) and pecuniary (Baumol & Oates, 1988; Scitovsky, 1954; Viner, 1932). Technological externality is the direct effect of the actions of economic agents on the utility of other economic agents whereas pecuniary externality occurs through price mechanism or transactional links. Scitovsky (1971) offers a comprehensive typology of technological externalities useful in understanding their differential nature and analysing their micro- and macro-implications. Table 5 precipitously summarizes the economic and marketing conceptualizations of externalities.

### Table 5: Conceptualizations for Externalities

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<tbody>
<tr>
<td>Concerns of Self-infliction</td>
<td>Capacity Externalities</td>
<td>Direct Effects</td>
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<tr>
<td>Concerns for Immediate Others</td>
<td>Nuisance Externalities</td>
<td>Private Externalities (1st and 2nd Party Effects)</td>
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<tr>
<td>Concerns for Future Others</td>
<td>Supply Externalities</td>
<td>Public Externalities</td>
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Table 5 precipitously summarizes the economic and marketing conceptualizations of externalities.
Concerns for General Others
Environmental Externalities (3rd Party and Society)

Nuisance externality is the neighbourhood effect, that is, the externality is inflicted upon third parties and citizens around the transaction. Mundt (1993) identified neighbourhood citizens as second parties and identifiable third parties, for example, externality from smoking affecting non-smokers. This externality relates to Nason’s (1989) foreseeable third party effects and causes from the lack of goodwill and welfare concern for immediate others. Since these externalities may usually be foreseeable, it receives the most attention when disregarded by transacting parties.

Capacity externality results from the limited capacity of resources in the short term. It results from overcrowding on resources. For example, road congestion due to limited capacity of a highway (Verhoef, 2002) or overcrowded theatre due to fixed seating capacity (Scitovsky, 1971). It is a distinguishing feature of this externality that the externality producer is simultaneously the creator and consumer of the externality. Nason’s (1989) foreseeable and unforeseeable first party effects somewhat overlaps capacity externalities where imperfections in market structure, information, and analysis cause transacting parties to suffer.

Supply externality is the long run counterpart of capacity externality. It results from using non-renewable resources, fixed capacity of which in the long run, would inflict undesirable consequences on future others. The existing generation obtains benefits from the non-renewable resources at the cost of the welfare of all future generations.

Environmental externality combines capacity and supply externalities and refers to the infliction of present and future generations as the aggregated society in the short and long run, e.g. air and water pollution, climate change, ill-effects of technology explosion, etc. They result from the lack of concern for general others and constitute the harsh reality of modern day consumption culture of over-indulgence and greed (Wooliscroft & Ganglmair-Wooliscroft, 2018). These effects are regarded as the aggregation phenomena emerging from physical or social interdependence of economic agents generating new complexities which are inconceivable from micro-analytic theory (Krupp, 1963). Nason (1989) has addressed supply and environmental externalities as indirect effects to all others inclusive of foreseeable and unforeseeable effects and identified aggregation of micro-transactions (Mundt, 1993), shift in social values and morals, and changes in economic and technological environment as the root causes.

The Taxonomy of Brand Externalities

Brands are social entities because they are deeply embedded in the cultural matrix. They do provide consumption with meaning (Hatch & Rubin, 2006), but perpetrate ramifications, not just on targeted segments, but consumers external to the intended domain (Fan, 2005).

Drawing from the discussion on branding dynamics and externalities, we define brand externalities, under the system’s perspective, as:

the discounted system component (brand variable) with no explicit brand value, in an exchange actor’s (consumer or firm) brand consumption or production function, over which the actor has no control and the magnitude of which is determined by some other actor or component in the branding system.

We propose a taxonomy of brand externalities (Table 6) from multiple conceptualizations of externalities discussed, to conceptualise the ways branding creates social trade-offs and
consequences beyond the micro-domain of this managerial activity. In no way, it implies any order or sequential occurrence of the phenomenon or claims adequacy of the attempt. This paper invites discussions and extrapolations for theoretical and practical developments.

Table 6: Taxonomy of Brand Externalities

<table>
<thead>
<tr>
<th>Categories</th>
<th>Description</th>
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<tbody>
<tr>
<td>Brand Congestion Externalities</td>
<td>It pertains to first party effects of brand exchange concerning <em>self-infliction</em>. It occurs when brand value for a stakeholder is influenced by self or other stakeholders within the calculus of brand exchange.</td>
</tr>
<tr>
<td>Brand Friction Externalities</td>
<td>It involves second party effects and relates to the social consequences of branding on <em>immediate others</em>. It occurs when branding influences subjects, not within the brand exchange dyad, but close around it.</td>
</tr>
<tr>
<td>Brand Junction Externalities</td>
<td>It refers to social consequences of branding on <em>future others</em>. It is evident when branding threatens psychological, social and physical well-being of children limiting progression of future generations.</td>
</tr>
<tr>
<td>Brand Cataclysm Externalities</td>
<td>It includes third party effects and concerns the social consequences of branding on <em>general others</em> in the short and long run.</td>
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**Brand Congestion Externalities**

Brand congestion occurs when a stakeholder within the brand exchange sphere affects the brand value for its counterpart knowingly or unknowingly. It is subcategorized based on the influencing stakeholder, illustrated in Figure 1.
Consumer-to-consumer brand congestion stems from network effects and network externalities. Network externalities, referring to the increasing utility a consumer experiences from a product with increasing number of total consumers of the product, was illustrated by economists Katz and Shapiro (1985) who delineated its two types as direct and indirect network externalities. Direct network externality is the physical effect of number of consumers on the utility and is a distinctive characteristic of network products like telephone lines or electric power grids. Indirect network externality is a market mediated effect and occurs through transactional links. For example, availability of better softwares due to rising customer base of hardwares potentially improves utility of all hardware consumers. Network externalities, attributed to consumer interactions, are extensively addressed in economics (de Lucio, Herce, & Goicolea, 2002; Farrell & Saloner, 1985; Liebowitz & Margolis, 1995) and marketing (Frels, Shervani, & Srivastava, 2003; Huang, Markovitch, & Ying, 2017; Srinivasan, Lilien, & Rangaswamy, 2004; Stremersch, Tellis, Franses, & Binken, 2007).

In network markets, consumers derive benefits from user networks, complementary networks and producer networks, the strength of which mediates the relationship between product performance and resource allocation in the market. A network’s strength comprises of its current size, expectation of future size, accessibility, compatibility and quality of members in the network (Frels et al., 2003). Just as these positive externalities may arise from network effects, negative externalities may arise from limited capacity of the network, called capacity externalities (Seitovsky, 1971) or congestion externalities (Verhoef, 2002).

Network congestion develops the premise of brand congestion which contends that brands are also limited in their capacity to provide the value and meaning to consumers. Network externalities are scarcely discussed in terms of brands and their symbolic effects (e.g. Helfof & Jacobson, 1999; Libai, Muller, & Peres, 2009). In addition to their bipolar nature with positive and negative outcomes, network externalities can also be elucidated on tangibility.

Apparently, brands are intangible networks where higher brand equity creates positive externalities for brand consumers. A physical manifestation of this phenomenon is when

<table>
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<tr>
<th>Affecting Stakeholder</th>
<th>Consumer</th>
<th>Firm</th>
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<tbody>
<tr>
<td>Consumer</td>
<td>Consumer-to-Consumer</td>
<td>Firm-to-Consumer</td>
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<td>Brand Congestion</td>
<td>Brand Congestion</td>
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<tr>
<td>Firm</td>
<td>Consumer-to-Firm</td>
<td>Firm-to-Firm</td>
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<td>Brand Congestion</td>
<td>Brand Congestion</td>
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Figure 1: Brand Congestion Externalities
consumers of a brand evidently transpose into a “structured set of relationships” called brand community (Muniz & O'Guinn, 2001, p. 412). Consumers seek emotional and psychological fulfillment through peer approval, affective association and belongingness; and utilitarian fulfillment through sharing information, assistance and participative rewards (Coelho, Rita, & Santos, 2018; Muniz & O'Guinn, 2001). Brand community members share values and germinate ethical surplus (Arvidsson, 2011).

Brand community membership may simultaneously exert negative externalities. Algesheimer et al. (2005) determined that the active engagement in a brand community may breed normative community pressure where consumers experience an obligatory burden to publicly comply with the community’s norms. It roots toward cognitive dissonance – mental stress due to lack of freedom in acting with volition. Consumers may not be self-aware of such a constrained state, but the psychological discomfort activates negative behavioural intentions. Active engagement in one brand community also intensifies a negative predisposition toward rivals within the community and members of rival brand communities. Consumers may indulge in ridicule, negative stereotyping, derogatory remarks and trash-talking (Ewing, Wagstaff, & Powell, 2013; Hickman & Ward, 2007) which may reflect negatively on the social standing of brand consumers themselves.

Consumer-to-consumer brand congestion is also manifested in dilution of value perceived in brands. Typically, an extensive market presence and higher market share is linked with positive market outcomes (Arthur, 1996; Caminal & Vives, 1996). Several brands accentuate their leadership position for this reason, e.g. Head & Shoulders claims to be “World’s No. 1 Antidandruff Shampoo” and Gillette promotes as “The Best a Man Can Get”. On the contrary, a negative relationship between market share and consumers’ quality perception and satisfaction is reported, indicating a diminished value perceived (Hellofs & Jacobson, 1999; Rego, Morgan, & Fornell, 2013). Brand value is often linked with exclusivity. The consumer desire for uniqueness and prestige gets violated and the utility derived by brand consumers starts dwindling, when a product becomes more prevalent and overused in the market. Every additional consumer adopting the brand compresses brand value unknowingly for self and other brand consumers. In this case, market price fails to reflect the marginal utility of the brand purchased by the consumer for oneself. The marginal utility of the brand to other brand buyers also diminishes causing disadvantage and discordance in brand buying and use.

Firm-to-firm brand congestion may also result from consumer interactions. Consumer interactions aren’t brand specific always, therefore it may not result in positive network externalities for innovator firms. Brand based interactions between consumers favour the innovator brand by reinforcing the competitive advantage. Higher expectation of larger network size due to rising competition in the market increases willingness of all consumers to pay. It benefits the former monopolist more due to the stronger effect of consumer willingness to pay over the effect of competition entering the market (Economides, 1996). This creates a positive externality providing competitive advantage to innovators over followers. Conversely, cross-brand communication among consumers of the product category becomes a positive externality for followers by reducing their take-off time and thus, a negative externality – a source of congestion for innovator brands (Libai et al., 2009). This mechanism is evident in the success of smartphones by Samsung and other brands following the launch of iPhone. Similarly, Google achieving brand leadership despite Yahoo prevailing in the market may also be somewhat attributed to it.

Another source of brand congestion for firms is the market fragmentation. Every new brand entering, differentially splits the market reducing brand value and return on branding activities because of diminishing perceived difference between brands. The network externality is also
shown to have a “chilling effect” on the net present value of a new product due to the combined influence of (1) the initial wait-and-see scenario of consumers, breeding a slow diffusion of the new product during the introduction phase, followed by (2) a fast growth in later stages (Goldenberg, Libai, & Muller, 2010, p. 4). This chilling effect becomes a source of congestion for firms, though it is counter-argued to not always be the case (Mukherjee, 2014). Congestion due to poor financial implications and slow adoption of the innovator brand may provide an opportunity for competition to enter and threaten the survival duration of innovators contributing to higher rates of their failures (Srinivasan et al., 2004).

Consumer-to-firm and firm-to-consumer brand congestion broadly encompass effects imposed by brand exchange partners – firms and consumers – on each other. When consumers engage in complaining, ridicule, negative word-of-mouth and such anti-brand actions, the firm definitely losses more than a group of dissatisfied customers. Similarly, corporate actions undermining ethical concerns like informed consent, freedom to choose, distributive justice etc., perpetrate externalities knowingly or unknowingly to the respective exchange actor. For example, when managerial mind-sets in pursuit of greater brand power recklessly target vulnerable consumer groups (Rittenburg & Parthasarathy, 1997) and consider the attractive packaging of harmful products and decorative packaging to allure children to be within the realm of ethics (Bone & Corey, 1992), it results in wider social consequences, the aftermath of which is beyond their control.

When corporate interests supersede social citizenship in the brand exchange, brand congestion gets entrenched. Activities like disguising brand-sponsored messages as anonymous word-of-mouth in web-based blogs, paid celebrity endorsements as spontaneous word-of-mouth and using brand pushers (common people) to deliver commercial messages as customer-oriented experiences (Magnini, 2011) comprise how intentionally firms exert externalities. Similarly, using corporate social responsibility (CSR) as a disguise to conceal questionable corporate activities (Fan, 2005), using emotional appeal as a surrogate for concrete product information (Caccamo, 2009) and deceive customers by filtering out content to be shared with the society (discursive closure); all cover the assertion of brand congestion. For instance, there is invited misuse when automobile brands incite young drivers with the speed and performance in their brand communications exposing them to the likelihood of driving mishaps (Jones, 2007). Also, brands are blamed for emotionally exploiting vulnerable consumers by utilizing and narrating social (external) atrocities in their corporate-image work (Muhr & Rehn, 2014).

Customers duped by brands in these ways propagate negative consequences like dwindling confidence, erosion of trust, denigrated self-esteem and heightened suspicion in commercial relationships and potential personal interactions, directly hitting individual and social welfare (Martin & Smith, 2008). It turns consumers into overly sensitive and fearful of commercial relations and increases the likelihood of them taking anti-brand actions even at the minor brand transgressions. The most vocal and enthusiastic brand advocates become the worst misanthropists of the brand (Thomson, Whelan, & Johnson, 2012), especially if the brand is highly self-relevant and the brand relationship fails (Johnson, Matear, & Thomson, 2011).

**Brand Friction Externalities**

Brand friction pertains to the social consequences of branding to immediate others. These include people, in close circles of brand exchange actors, like friends and family members, neighbours, colleagues, workplace associates and others, who are not directly involved in the brand exchange. Brand friction is most prominent during interactions between people from different social strata because friendships are often brewed on the basis of belongings causing social discrimination and exclusion. Based on the brand consumption, Roper and Shah (2007) reported incidents of bullying, teasing and stereotyping among children in Kenyan and British
schools. Those, not in possession of the right brands, found it difficult to fit in and were frequently labelled as “poor quality people” (p. 719), “un-cool” (p. 720) and “out-groups” (p. 721). This interpersonal pressure deprives the children of the value of community and belonging and prompts the feeling of resentment in them toward their parents. Parents, in turn, suffer from guilt owing to the victimization of their children and inoculation of inferiority complex in them. It specifically strains family relationships during festivals and occasions.

Ritzer (2004) has illuminated upon brands undermining social relationships. Brands have contributed in the disintegration of the family by demeaning family values. The noisy, impersonal environment provided by fast food brands is anything but quality family time. Also, fuelling the tendency of teens to hang out with their friends, fast food brands have distanced them from their parents. Brands have also impaired other social relationships. For instance, they account for fleeting and impersonal relationships between customers and employees. The scripted customer interactions, workers are trained for, in service encounters like drive-throughs, limit developing any personal relationships as before. Workers are unlikely to blossom strong bonds between themselves too due to restricted workplace interactions and high employee turnover.

Besides these social (consumer) groups, immediate others also include stakeholders like employees, suppliers, distributors and retailers of brands, who may not be potential brand buyers, but get exposed to the brand power of firms. The critical analysis of McDonald’s brand journey (Botterill & Kline, 2007) describes the havoc brands can wreak over their immediate stakeholders. McDonalds is accused of exploiting young and immigrant workers, thanks to the high unemployment and inexperience, by keeping wages low and demanding non-unionization, stringent productivity and flexibility in labour hours supplied. Likewise, Ritzer (2004) criticized fast food brands like McDonalds and Burger King for establishing robot-like work settings utilizing minimal set of skills, neglecting skill development and discouraging creative thinking that contributes to job dissatisfaction, high employee turnover and poor well-being.

Vertical restraints in the brand supply chain form another aspect of brand friction. It includes restrictive distribution agreements for prime shelf space, full line forcing, sole distribution and change in retail atmosphere to reflect the brand image. Also, buying agreements with component manufacturers enforcing usage of their brand name in component manufacturing and, consequently, eclipsing corporate reputation of suppliers is a testimony of brands executing their power over supply chain partners (Ashton & Pressey, 2011). Starbucks efforts to suppress Ethiopian coffee producers’ trademark applications through industry lobbyists, depriving them of the value they are generating, is not just a matter of exploiting supply partners, it questions the ethical and moral credibility of the corporate where, despite producing a highly valued commodity, Starbucks’ brand power have denied them the freedom from poverty and starvation (Adamy & Thurow, 2007; Faris, 2007).

**Brand Junction Externalities**

It follows the contention that “today’s consumption causes tomorrow’s externality” (Meade & Nason, 1991, p. 81) and refers to the connection of the present brand-fostered consumer culture with future others. Branding typically resonates with children and have tremendous impact in their psychological development and socialization. Formulation of child-brand relationships commences at an early age (Ji, 2002). Young children view brands perceptually whereas more conceptual interpretations occur while growing up (Achenreiner & John, 2003; Diamond et al., 2009; John, 1999) and so does the brand usage vary.

Brands are more than a source of fun and entertainment for children. They are used as a passport to the membership of aspired groups, to seek value for money, quality in consumption, and
reinforce gender identity. Children re-enact brand narratives in their social environments (Nairn, Griffin, & Wicks, 2008). For example, the American Girl, epitomizes ordinary dolls with historical and personal stories. It illustrates social values reinforced by the intergenerational engagement of grandmothers, mothers and daughters at the American Girl Place and personal spaces where “these personal narratives are then redacted, recirculated, and replayed” (Diamond et al., 2009, p. 131).

On the contrary, brands can instil negativity and suspicion and invoke extreme hatred, violence, vandalism and theft (Nairn et al., 2008; Roper & Shah, 2007). In what is called the “Sneaker Culture” (Weinswig, 2016), brands are accused of instigating sneaker crimes when a pair of Nike’s Air Jordon came to the centre stage for being the motive behind first-degree murder of a 15 year old boy on May 2, 1989 (Telander, 1990). A similar incident reported as recent as Dec 18, 2017 (Alexander, 2018); a father stabbed over protecting his 8 year old son from a teenager trying to rob the kid off a pair of sneakers (Hitt, 2017), and countless newspapers adorned with reports of such heinous delinquencies direct toward how susceptible some consumers can be and how significantly branding needs to incorporate the multidimensional construct of consumer vulnerability (e.g. Baker, Gentry, & Rittenburg, 2005).

Brands have commodified self-esteem, because failure to fit-in and possess the right brands cause negative peer evaluation, social exclusion and damaged self-worth (Isaksen & Roper, 2012). They have caused transformation of younger generation into the insecure materialistic dependents of consumerism for identity and social reference (Achenreiner & John, 2003; Roper & Shah, 2007). Prevalence of these developmental defects are more pronounced in children from the lower socio-economic stratum. Brands are used to disguise poverty (Roper & Shah, 2007) and it is observed that brand names are more desirable to children from the lower socio-economic tier (Piacentini & Mailer, 2004). These children seek reinforcement of self-identity in brands and when unable to keep up with the modern consumption trend, their self-concepts destabilize. It becomes “a vicious cycle” where weaker self-concept further enhances their susceptibility to peer pressure and financial aspirations to reach the status quo (Isaksen & Roper, 2008, p. 1063). It plagues them with social comparisons interfering with their intra-psychic development and social wellbeing.

Children’s physical wellbeing is also directly threatened by food branding and popular media placements of brands. Brand characters, like Chester the Cheetah (Cheetos), Tony the Tiger (Kellogg's Frosties), Ronald McDonald (McDonald), M&M’s Spokescandies, etc., instil early brand recognition in children affecting their food preferences and eating habits (Boyland & Halford, 2013). Brand tie-ins with popular media characters and spaces like Coca Cola placed in American Idol and Burger King enticing children with SpongBob toys during the movie’s release exemplify how future generations are being cluttered. Brand awareness mediates the relationship between weight status and food intake and obese children are found to be more responsive to food branding taking in statistically larger food portions in branded meals (Forman, Halford, Summe, MacDougall, & Keller, 2009). Branding affects children’s taste perceptions to the extent that they were found to accept milk and carrots coming out of McDonald’s packaging (Robinson, Borzekowski, Matheson, & Kraemer, 2007).

Promotional regulations on tobacco marketing has also turned corporates to take the route of branding. Branding (brand familiarity and brand image) exerts a much powerful influence on adolescents’ attitude and intention to smoke than peer influence (Grant, Hassan, Hastings, MacKintosh, & Eadie, 2008). These brands communicate, primarily, through packaging and point of purchase promotions. Further, event marketing tactics like sponsorships of global events have taken the impact of tobacco branding beyond the borders increasing the propensity of adolescents relating to and indulging in physical afflictions through smoking. In the same
way, young children easily correlate with alcohol branding (F. Harris, Gordon, MacKintosh, & Hastings, 2015). The vivid imagery and symbolic structures of style, class and maturity in alcohol brands typically resonate with them providing a gateway and authentication into adulthood.

Brand junction externalities sketch the misfortune befallen children’s lives and deliver a bleak picture of the future, contrary to what the ideals of sustainability and welfare venture. Psychologically unstable children with limited physical capabilities due to obesity and other ailments would not be able to commensurate the happy image of the future world and thus require interventions to sustain the epidemic of the consumer culture.

**Chronic Brand Externalities**

Chronic externalities relate to the impact of branding on general others that comprise wider society. These amount to the collective adversity of branding practice and fall in the dominion of conservation versus commercialization discourse. Providing a meaning and cultural logic to the consumption, branding has accelerated the rate of resource exhaustion. Wilk (2006) described how branded water exemplifies commodification of a free public good causing deleterious effects on the natural habitat and environment in the process. It has exponentially multiplied the incidence of plastic bottles overrunning landfills, discarded in ocean, or incinerated otherwise at the expense of public welfare and contributed to ecological problems like rising air and water pollution, global warming, energy shortage and hiking prices. Billions spent on a commodity available freely is a sheer wastage of scarce resources. Expending resources in this manner, only to bring a marginal difference in lives of those who are blessed adequately, without any regard to a major proportion of the world with no access to sufficient clean water, is counter to the sustainability claims of brands. For example, Nestle Pure Life, despite its Water and Environmental Sustainability Policy, is criticized for developing a bottled water culture, which serves as a status symbol for minor elite, by extracting ground-water in Pakistan. It is drying out existing water systems and violating human rights to health by exacerbating inaccessibility of the majority poor for clean drinking water (Rosemann, 2005).

Besides environmental disservice, chronic brand externalities also include psychosomatic nuisance on humans. Brand priming may significantly disrupt human behaviour (Chartrand, Huber, Shiv, & Tanner, 2008). It means sheer exposure to brands may trigger brand-identity consistent traits and cause humongous alteration of the behaviour. Brasel and Gips (2011) reported a dual effect of brand exposure on the behaviour in a laboratory experiment where respondents were exposed to brands in a non-consumptive environment. This dual effect encompasses the simultaneous positive and negative outcomes on consumer performance metrics and assures that, whether be a brand consumer or not, supraliminal or subliminal exposure to brand is pervasive and have detrimental effects.

A conspicuous branding strategy causes the social division by creating unattainable aspirations among poor (Isaksen & Roper, 2008; Roper & Shah, 2007), materializes social inequality by reinforcing social exclusion and render the corporates with the power of leeching upon desires of low-end consumers to emulate high-end consumer choices (Amaldoss & Jain, 2015).

In this regard, compulsive buyers are more vulnerable and easily fall prey to the emotional exploitation (Horváth & Birgelen, 2015). Characterized with major depression, erroneous beliefs about self and shopping and difficulty in decision making (Kyrios, Frost, & Steketee, 2004), they usually try to relieve themselves of the depressive state by seeking status and prestige in well-reputed, premium priced brands (Kukar-Kinney, Ridgway, & Monroe, 2012). This materialistic tendency arises as a coping mechanism in the face of self-doubt and perceived normlessness of the society (Chang & Arkin, 2002). Brands become a surrogate for
such consumers met with unfulfilled social and interpersonal needs (Thomson et al., 2012). Material possessions become a measure of success and happiness leading to imprudent and snobbish purchases as people seek out social displays of material assets to compensate for feelings of self- and social-uncertainty. This unhealthy coping mechanism usually results in lower self-esteem, poor functionality, diminished life satisfaction and heightened social discomfort.

Corporations authenticate the illusion of life satisfaction and happiness wedged on brands. When Disneyland claims to be “The Happiest Place on Earth” and BMW gloats as “Joy is BMW”, Coca Cola promoting itself as “Open Happiness” and Hershey's Chocolate as “Pure Hershey’s. Pure happiness”, they imply discovering happiness and nourishing ones heart and soul by indulging with them. These brand promises – seemingly harmless claims – are largely paradoxical because consumerism do not provide happiness and fulfilment of psychological needs, undermining subjective wellbeing (Wang, Liu, Jiang, & Song, 2017). At best, they drive consumer emotions into the delusion of fleeting contentment to supplement “the extraction of surplus value” and “buffer it’s (firm’s) voracious appetite” for capital accumulation (Goldman & Papson, 2006, p. 340).

Material well-being and subjective well-being is negatively correlated and this phenomenon can be elucidated from a socio-cultural and psychological perspective (Csikszentmihalyi, 1999). Material acquisition, brands in this case, become quickly habituated and escalate self-expectations providing merely momentary happiness. Also, when more psychic energy is exhausted in pursuing happiness from extrinsic means, less remains for its pursuit intrinsically (Wang et al., 2017). As material value of an individual rises due to growth in income and social status, the opportunity cost of seeking happiness from alternative innate means like friends, religion, art, natural beauty etc. exceeds making these abstract sources of happiness irrational. The socio-cultural cause of discrepancy between materialism and social welfare lies in relative deprivation (Crosby, 1976). Material possessions are universally evaluated, not in terms of personal gratification and self-fulfilment, but in comparison with relatively prosperous associates causing eventual exasperation. The disintegration of community sense and emergence of quantifiable lifestyles have ingrained the hoax of material acquisitions into the equation of happiness and subjective well-being (Csikszentmihalyi, 1999; Swaney, 1981; Wang et al., 2017). Thus, brands endure as psychedelic drugs providing ephemeral ecstasy but later fomenting relentless psychological and physical ramifications.

Social issues related to the deception and emotional manipulation that undermines trust are linked with branding. Brands engender psychological attachment to the consumption which undermines deeper social needs of love and gratification and endanger “integral human development and undermine common good” (Caccamo, 2009, p. 309), because it leads to consumers spending resources on what they don’t really need. Similarly, it is demonstrated that mere exposure to status-oriented brands can non-consciously trigger desire for prestige and stature subsequently influencing consumer choice towards premium priced products (Chartrand et al., 2008). This way the consumer preoccupation with material acquisition and brand-orientation hinders the attainment of sustainability in production and consumption (Scott, Martin, & Schouten, 2014).

The tiers of brand externalities discussed do not infer exclusivity. Keeping in view the complexity of branding construct and meaning-led discrepancies spilled over multiple stakeholders, stark contrast among the effects is difficult. For instance, brand junction and chronic externalities involve physical and psychological influences but are segregated on the basis of temporal and spatial perspectives. It is important to notice that each stakeholder within a social system is subjected to branding one way or the other and may fall conditionally into
any class of brand externalities. It further blurs the distinction and exacerbates the predicament of comprehending the taxonomy for future extrapolations.

**Micro-Macro-Relationship of Brands and Society**

The macromarketing literature has identified that dyadic, micro-level interactions, activities and decisions of individual stakeholders are based on self-interest and usually involve a cost and benefit analysis from micro-perspective; but it creates a chaos at the macro-level (Beard, 2010; Bone & Corey, 1992; Layton, 2007; Lee, Cherrier, & Belk, 2013; Nason, 1989; Redmond, 2018; Rittenburg & Parthasarathy, 1997). Branding is also one such activity produced and consumed supposedly within the dyadic stream of firms and their target markets without any regard to its dysfunctional consequences on society.

Brand externalities evidently reflect the micro-macro relationship of the managerial practice where brands, not just influence consumers, but also affect immediate others, general others and future others, and proliferate the arguably minor transgressions into humongous social mechanisms like anti-branding movements. Such social mechanisms establish the phenomenon (brand externalities) as a system’s problem due to the interdependency of social actors and the aggregation of individual attitudes, beliefs and behaviours.

Externalities are frequently described as a system’s problem (Callon, 1998; Krupp, 1963; Laczniak, 2017; Meade & Nason, 1991; Mundt, 1993; Mundt & Houston, 2010; Nason, 1989; Vatn & Bromley, 1997). Krupp (1963) implies a system’s approach while stressing on analysing behaviours as interrelated wholes where actions occur within the individual sphere and externalities emerge beyond what is called a boundary. Externalities draw the connection of micro-structures to the macro-aggregates. Callon (1998) takes a similar stance and explains externalities, labelled as overflows, from a sociological perspective. He affirms that overflows (externalities) emerge as a failure in the framing process where it is either impossible to frame the behaviour (virtual impossibility of assigning property rights) or the frame is purposefully transgressed by agents involved (disregarding welfare of others).

The question arises whether brand externalities let branding create or destroy value. Bertilsson and Rennstam (2018) demonstrated an inter- and intra-world critique on branding. It was illustrated that brands create value for consumers and firms in the market world, but the spill-over from this value – brand externalities, sabotage value in other worlds of fame, industrial, civic, domestic, inspired, and green worlds. Similarly, when sometimes value is created in market world, it can simultaneously destroy value in the same world (regarded here as brand congestion). Mittelstaedt, Kilbourne, and Mittelstaedt (2006, p. 131) stated, “The actions of market participants have consequences far beyond the boundaries of firms.” It can be inferred that brand externalities link contemporary marketing systems (market world) with stakeholders beyond the system (in other worlds) and affirm the non-linear direction of the brand exchange.

The evolution of brand management is attributed to macro-environmental turbulences over the course of past centuries (Eckhardt & Bengtsson, 2010; Low & Fullerton, 1994); it links branding with the society beyond the conventional understanding. Fournier (1998, p. 366) argues how brands holistically articulate their relationship with consumers both at the micro- and macro-level and stresses on “consideration of the larger whole in which that (consumer-brand) relationship is embedded.” Schroeder (2009, p. 124) comments that brands have become “ideological referents that shape cultural rituals, economic activities, and social norms.” It distinguishes brands as more than an exchange commodity in a marketing system. Brands are cultural resources (Holt, 2002), a culture cynosure (Diamond et al., 2009) that leaves impressions beyond the scope of marketing system into the wider context of economy, society and culture, even the global ideoscape (Askegaard, 2006).
Conclusively, in line with Kadirov and Varey (2011) and Conejo and Wooliscroft (2015), it is asserted that brands can be conceptualised as semiotic marketing system, or symbolic characters of marketing system assortments and brand externalities are the symbolic spill-overs and a major output in marketing systems.

**Regulatory Concerns for Brand Externalities**

Regulatory mechanisms developed to shield from hazardous effects of an industry or managerial practice usually future-proof it by igniting a need for innovation in current activities, thereby laying the groundwork for future strategies that may become further difficult to regulate. For instance, brand sponsorships by tobacco firms in global events, continue to influence the smoking behaviour locally despite domestic enforcements and the ban on tobacco marketing. Government regulations to cater brand externalities, as intangible and pervasive as discussed, are doomed to failure in this regard.

For the public policy, all-pervasive brand externalities, impose a monumental challenge. Consumer awareness programs for children to encourage the resistance against pressures of consumer culture and ease the burden of poverty; enhancing self-esteem to maim materialism; and mechanisms to restore the sense of community responsibility and appreciation of broader social values, would just be the beginning.

It requires an endogenous institutional restructuring in marketing systems (Dahlman, 1979). Vatn and Bromley (1997, p. 148) identified, “Issues such as moral commitment, collective standards, social norms, and network processes may attain a higher position in the understanding of externality policy.” The distinctive quandary of communal and personal goal conflict necessitates an equilibrium of motives and modification of behavioural patterns. Though minor amendments in the individual predisposition can be immensely constitutive, galvanising the self-control and swimming against the gigantic tides of long-standing consumer culture is a vicious challenge.

Branding itself holds the promise to regulate and resolve the deeper transgressions because it is a highly dynamic capability (Brodie et al., 2017). First, brands possess the ability to address the institutionalism in externalities caused by the asymmetrical information because brands hold an ethereal power to inculcate trust between multiple stakeholders and price premiums could be justified to indemnify the society instead of gorging the self-interest. Secondly, because property rights can clearly be demarcated to trademarks, brands can help internalize positive externalities and encourage the development of sustainable production and consumption. Kumar and Christodouloupoloulou (2014) provides a framework and guidance to integrate sustainability practices with branding strategy.

Corporate social responsibility (CSR) may be used to justify the corporate standing in the wake of brand externalities. Brands can be blamed for masking their negative effects through baseless CSR activities. Evidences have been reported where brands strive hard to appear doing the right thing instead of actually doing right for the society and environment (Jones, 2007; Muhr & Rehn, 2014). Even if the notion of CSR in branding is realised to genuinely provide for the society, the concern for meaning-led discrepancies stays put. It does not mean that CSR do not hold any place in the branded world. Maintaining the corporate legitimacy demands the consideration of ethical, moral and social values and goes well beyond weaving positive media stories around CSR. If a firm incorporates concerns for environmental impact, climate change, internal and external code of corporate ethics, it gives a conscientious character that adds a positive dimension to stakeholder relationships (Rindell et al., 2011).

Ethical branding is a debate parallel to the anti-branding discourse. Fan (2005) identified the domain to be highly under-researched and prompted toward its qualitative and quantitative
development. Szmigin, Carrigan, and O'Loughlin (2007) provided an alternate view and proposed how ethical brands could be developed. Trudel and Cotte (2009) reported an increased tendency of consumers to pay substantial premiums for ethically-produced goods and cautioned that the negative impact of unethical behaviour is greater than the reward of being ethical. It suggests that brands have a financial gain too, in being ethically oriented. Ethical branding is an intangible construct of paramount importance that grants a new dimension for brand positioning and must be embedded well into the corporate marketing strategy to potentially internalise brand externalities.

Identifying key brand stakeholders becomes imperative in managing brand externalities and brand stakeholders must not be assumed synonymous to the target market. A macromarketing method for analysing the systemic architecture of brand externalities holds promising remedy. The notion of a system’s model of branding is not new (e.g. Keller & Lehmann, 2006) but the idea is not adequately developed in the academic sector to precede realizing its value and implementation in corporate circles. The system’s model would allow linking branding practices with the wider array of stakeholders and recognising brand externalities as a potential outcome of the system. It would enable to understand the social mechanisms and action fields where the trouble may be deeply rooted. This paper calls for further qualitative and quantitative investigations and establishes future research directions on conceptualizing the brand system; systemic effects of branding on multiple stakeholders in the society; and preventive mechanisms to be adopted for a safe society.

**Discussion**

Brands are ubiquitous (Keller & Lehmann, 2006; Levy & Luedicke, 2013) and organizations and entities holding an anti-branding stance also use branding strategies to impart themselves (Østergaard et al., 2015). Brand enthusiasm and brand opposition has its roots in the same societal phenomenon (Palazzo & Basu, 2007). One may not exist without the other, therefore coherence between brand values and social values should be sought in supplementing consumers’ search for identity. Consumer resistance initiatives are troublesome for both firms and consumers and it threatens the sanctity of not just the marketing system, but the holistic social system. Firms ceaselessly strive in dealing with the wrath of critical reflexive consumers and suspicious society; whereas consumers find themselves trapped in the contradictory logic of critical reflexive identity because it is impossible to escape branding in the modern consumer culture. Cultivating self-identity from within may be impossible. Like brands do not provide an infinite source of self-expression (Chernev et al., 2011), other self-expressive acts may also be limited in their service.

This reflects to a systemic anomaly in contemporary marketing systems. Just as the quintessential typology of the social consequences of marketing features the foreseen and unforeseen effects (Nason, 1989), brand externalities are also wrought knowingly or unknowingly. Unintentional afflictions caused by brands may be somewhat supplemented as systemic anomaly yet to be analysed through a system’s vision (see Layton, 2007; Nason, 2006). Adversity, well perceived and disregarded, formulates the major proportion of the plight and showcase an ethical paradigm.

Much research has focused upon brand sustenance and strategic and competitive advantage (Das, Stenger, & Ellis, 2009; Dunes & Pras, 2017; Santos-Vijande, del Río-Lanza, Suárez-Álvarez, & Díaz-Martín, 2013; Strebinger, 2014; Webster, 2000). These perspectives are drawn on wins for brands neglecting its impact on wider society. Branding should be catered for win-win instead of win-lose where the society receives the lose aspect predominantly. Branding, that plays upon vulnerabilities of consumers, brings the marketers’ dream to life; but this dream induces nightmares upon the society beyond their managerial logic. A device as
powerful as branding is valuable yet fragile enough to kindle social implications as brand externalities.

Advertising usually takes the blame and faces criticism and regulatory enforcements but it is important to recognise that the branding strategy is at the heart of all marketing communications. To counter the regulations on advertising, corporates have turned toward branding as it imposes a greater challenge for regulatory authorities to objectify and regulate brand misconduct (Ashton & Pressey, 2011). Target market selection is also contested to have significant ethical implications (Rittenburg & Parthasarathy, 1997). Branding follows target marketing thus adopts the ethical issues that come with it. Concerns like quality of the product branded; pricing premium for brands; selective distribution; promotional content impersonating puffery and targeted at vulnerable consumer groups generate externalities that may appear to be a systemic anomaly but exemplify ethical choices.

Branding is in direct conflict with the dimensions of distributive justice (Ferrell & Ferrell, 2008). It causes social inequality and violates the principle of strict egalitarianism and the difference principle; it breeds compulsive choice through manipulative practices leading to unequal economic outcomes and defying the resource-based principle; it impairs individual liberty and makes people dependent on brands for self-expression contravening the libertarian principle. Also, curtailing freedom of choice by anti-competitive acts exhibits defiance of the same value. And, unnecessary portrayal of women in men product brands, setting unjust and baseless beauty standards and reinforcing notions of self-improvement for social acceptance for women is the forthright infringement of the feminist principle.

Layton (2011) stated, “At the macro or aggregate level characteristics of the assortments offered will often be economically, socially and politically important. Restricted access to goods, services, experiences and ideas may lead to social disruption…Assortments that encourage obesity, unsustainable energy use, or which may distract a population from the pursuit of socially important ends may also be discouraged…assortments generated by marketing systems are highly visible indicators of the nature of a society, its values and its commitments” (p. 272). In this regard, current branding practices producing untenable brand assortments do not reflect social sustainability. For the purpose, the present paper not just identifies brand externalities but calls for a more nuanced, judicious, and expedient use of the branding practice.

According to Ferrell and Ferrell (2008), “Macromarketing ethics is concerned with economic and social impact in the distribution of products and other resources through the marketing system, including the consequences to all stakeholders” (p. 31). The debate on brand externalities expands the domain of macromarketing ethics, including the distribution of, not just products and resources, but meanings and interpretations of brands and their consequences to all stakeholders. Managerial activities intended to develop the value and meaning through active negotiation within the society should pass through the framework for marketing ethics (like Laczniak, 1983). When the customer commitment to the brand increases, it eventually makes the compliance to ethical norms difficult and increases the ethical burden by driving toward lesser ethical behaviours (Story & Hess, 2010). Also, post-modern marketplaces are multicultural and when used thoughtlessly, disregarding the phenomenon of cultural identity formation, branding may aggravate consumers’ vulnerability (Kipnis et al., 2013). For these reasons, brand scrutiny from an ethical perspective must be repeated with each branding campaign and shouldn’t be a one-time activity. Instead of exacerbaring vulnerabilities of target and non-target brand consumers, belonging to different subcultures in a dominant culture, by discriminatory branding, the inter-group dynamics should be respected through a culture-based and ethical brand voice to minimize brand externalities.
Conclusion

Proposing brand externalities, the present paper delves deeper into the social impact of yet another managerial practice, found to be profoundly overlooked. A system’s based model of branding would be an attempt to systemically further macromarketing vision of refocusing sustainability (Nason, 2006). This paper brings branding further under the macromarketing umbrella and contributes to the stream of research that emphasizes destructive branding practices (Bertilsson & Rennstam, 2018), by enabling to comprehend the anti-branding discourse and underlying articulations within consumers’ construction of consumption-resistant identity.

Brand development that is conscientious and ethically sound should be holistic, environmentally oriented and aesthetically appealing. It should incorporate effects of the past heritage, not just a cosmetic veil, but formulate an authentic trajectory that links system-wide stakeholders to the happy ideals of future welfare and sustainability. Identifying brand externalities is an attempt to create opportunity to revitalize branding for post-postmodern branding era. For any marketing system to thrive and contribute to the developments in a social system, consideration of brand externalities as a potential output of contemporary marketing system and its proactive management is essential.

References


306


The Role of Social Media in Marketing Systems
Rachel Patrick, University of Wyoming

Abstract
Social media’s influence on consumers and firms has been recognized by marketing academics and practitioners. To begin to examine its effects on a macro-level, this paper analyzes the role that social media plays within marketing systems. Starting with definitions of social media and marketing systems, and using Manuel Castells’ ideas about the network society, this paper proposes that social media plays three roles within marketing systems: indicating and revealing change, influencing change, and indicating when a marketing system’s assortment does not meet the needs of the consumers within that system.

Keywords: social media, marketing system, network society
Relational Autonomy and the Pregnancy, Childbirth and Post-partum Customer Journey: A Micro, Meso and Macro Perspective

Teresa Pavia, Eccles School of Business, University of Utah, Salt Lake City, UT
Kathrynn Pounders, Stan Richards School of Advertising & PR, Austin, TX
Monica LaBarge, Smith School of Business, Queen’s University, Kingston, ON

Background

Responding to the call for research that takes a broad perspective on consumer vulnerability, we explore how a complex marketplace impacts a consumer’s experience of pregnancy, childbirth, and the post-partum period. The definition of vulnerability commonly applied in the macromarketing literature hinges on experiences of powerless, isolation or reduced choices in the market or a consumption setting (Baker, Gentry, and Rittenburg 2005; Baker and Mason 2012). Pregnancy/childbirth/post-partum can be seen as a location of situational vulnerability in which power and choice ebbs and flows between the mother, her extended support network, physicians, nurses, midwives, socially constructed expectations, regulations within the birthing location and regional and/or national laws (Davies, Dobscha, Geiger, O’Malley, Prothero, Sorensen and Thomsen 2010b). This work uses two streams of theory and analysis to explore the potential vulnerability and decisions women make during this time: relational autonomy and the macro, meso and micro forces women encounter. The framework of customer journey is used to approach the woman’s trajectory across this time through depth interviews with narrative discourse.

The narrative approach of a customer journey considers the interactions a customer had as he/she pursued a consumer goal, such as making a travel reservation, finding the right school for her children or having the birth experience she hopes to have (Rawson, Duncan and Jones 2013, Lemon and Verhoef 2016). While customer journey has been used in health care settings before, the number of studies that focus on the consumer experience of pregnancy and delivery are few and those that have been done have often had the focus of optimizing service delivery in a health care setting (Krisjanous and Maude 2014).

Both autonomy (acting independently) and agency (the capacity or state to act independently) are central to consumption and are especially important in areas concerning the decisions related to the body. Closely aligned to the concept of autonomy is the theory of relational autonomy in which the individual making the decision is influenced by social context and close relationships. Pregnancy is a unique situation in which not only are decisions made within a web of social relationships, they are also constrained by trying to provide care for a child while it shares the same body with the mother. In an overview of the consumer literature on consumers making choices for others (Liu, Dallas and Fitzsimons 2019) or the ethics that surround the caring for others (Shaw, McMaster, Longo and Özçaglar-Toulouse 2017), the other is considered a cognitively intact separate individual with preferences of his or her own. Choices that one may make for a cognitively impaired or unborn person do not fit within the types of frameworks that are typical in the consumer literature, indicating that pregnancy is a setting with a number of open questions. Additionally, while pregnancy and delivery are fraught with the possibility of vulnerability, there is also the possibility that women’s satisfaction may hinge on the ability to abdicate choice. That is, facing an unpredictable consumer experience (i.e. birth), some women may prefer reduced choice to free their attention to the task their body is called to do, while others may approach the uncertainty of birth by trying to retain as much choice as possible.
The micro/meso/macro analysis is a framework that has applied in various settings to understand the complex interplays that impact a particular situation. Within the context of the pregnancy/childbirth/post-partum period (roughly one year), “micro” refers to issues related to the intimate level closest to the body, for example, the woman’s ability to get up and walk around during delivery. The “meso” level folds in social networks and peer group influences, such as the expectations her family/peer group has for what constitutes a good pregnancy and delivery. The “macro” level encompasses things that are considered more societal in nature such as state or national laws, the accessibility of health care providers and the physical parameters of the birthing site (e.g., restrictions on provider choice due to insurance coverage or local laws regarding midwifery or home delivery).

Davies et al., also known as The Voice Group (2010b) unpacked many of the macro issues related to the vulnerability associated with motherhood into medical, legal-political, sociocultural, and media constructs that impact consumption-related vulnerability during this time. Their focus centered more on baby products and maternity-related services and less on the process of controlling the physical, emotional, and social experience of pregnancy, labor and delivery, and the post-partum months. By placing the delivery at the center of our investigation and tracing the process as part of an extended customer journey, we re-center the perspective of the micro, meso, and macro forces into the lived experience of the woman.

In this abstract we present some of the basic macro, meso and micro issues that can impact pregnancy/childbirth/post-partum customer journey. This type of systematic approach allows a realistic and rich interpretation of the research phenomenon (Vargo et al. 2017). The conference presentation will supplement this analysis with interview data. As Frohlich, Corin and Potvin (2001) note, particularly in the health care setting, “What is missing is a discussion of the relationship between agency (the ability for people to deploy a range of causal powers), practices (the activities that make and transform the world we live in) and social structure (the rules and resources in society)” (p. 781). Our position is that for those interested in the time of pregnancy/childbirth/post-partum, questions of vulnerability and agency (Davies 2010b) require looking beyond policy; it is also not sufficient to look solely at the influence of roles, peer groups and family; considering micro, meso, and macro issues together paints a more complete picture.

**Macro Forces That Impact Pregnancy/Childbirth/Post-partum**

There are three broad macromarketing areas that exert influence on pregnancy childbirth/post-partum. The first is the laws surrounding labor and delivery practices in a given geographic region. For example, while an obstetricians-gynecologist (ob-gyn) is recommended for a high-risk birth, some women prefer a less medicalized approach to labor and delivery. In the United States, there are three different educational paths and professional certifications for midwives (Vedem et al. 2018). Each of these types of midwives are then regulated by a patchwork of laws across the 50 states leading to great variation in the type of midwife one could seek in the U.S. In 2015, 90% of U.S. births were attended by a physician, while midwives were responsible for 8.5% (Vedem et al 2018, 10-11); consequently, even if a woman desires a home birth attended only by a licensed mid-wife, this may not be possible depending on where she lives given these differences in licensing and legislation.

The second macro force that constrains choice for how one prepares for and delivers her baby is the high concentration of obstetricians and gynecologists (ob-gyn) in certain geographic areas, leaving other areas with few provider choices. For example, as of 2017, only 51% of all counties in the United States have at least one practicing ob-gyn, requiring over 8% of all women in the United States (largely rural residents) to travel long distances to receive ob-gyn care (American College of Obstetricians and Gynecologists 2017). Some have the child
delivered by family medicine physicians, mid-level care providers, midwives or a non-professional delivery assistant, although as noted before even these resources are limited in many areas and the services these various care providers can legally provide varies from place to place. Data for all births in the United States in 2016 show that 15% of all birth mothers that year received inadequate pre-natal care, meaning either no prenatal care at all, only late-in-pregnancy-care or an inadequate number of prenatal visits care (Osterman and Martin 2018).

The third public macro force is health policies designed to improve maternal-child health. In their history of maternity care and the law Cartwright and Thomas (2001) suggest that various stakeholders, particularly health care providers, establish power by offering to reduce risk and uncertainty. However, in the case of childbirth, this has resulted in the majority of births occurring in hospitals (Satow 2018) although in the United States a “Cochrane review (Olsen & Jewell, 2006) concluded that no strong evidence exists in support of a planned hospital birth for healthy, low-risk women” (Lothian 2006, 44; see also Vedem et al. 2018). So, at face value planned hospital births would seem to be an offer to reduce vulnerability by ensuring safety and predictability, but also open the door to limiting choice of delivery setting. At the same time, delivery may be a complex medical situation and some women, facing choice overload (Scheibehenne, Rainer and Todd 2010) and high uncertainty may prefer fewer choices.

Another example of public policy as a macro force that segues into the meso forces of social networks and community comes from Canada. Twenty one percent of Canadians live in rural communities with many of these people being Indigenous. Prenatal care in these communities is limited and many women have to travel long distances for anything other than a home birth. In the 1970s, in an effort to reduce risk, women began to be transferred, sometimes weeks before their due date, to medical locations with surgical backup. As reported by Lawford, Giles and Bourgeault (2018), the “evacuation policy” codified in the One Health Canada policy, “requires all First Nations women living on rural and remote reserves to leave their communities between 36 and 38 weeks gestational age and travel to urban centres to await labour and birth” (479). Indigenous populations question having a woman give birth far from home and far from her support network. The process is still being negotiated almost ten years after the Society of Obstetricians and Gynaecologists of Canada (2010) released a statement that “promotes the return of birth to rural and remote communities for women at low risk of complications” (1187).

**Meso Forces That Impact Pregnancy/Childbirth/Post-partum**

Meso-level issues are related to community, and in this instance, include organizations and networks (e.g., health care providers), social media, and one’s extended consumption group (e.g., family, friends). Specifically, these issues revolve around beliefs related to pregnancy/childbirth/post-partum and how information, opinions, and expectations are communicated (Ferguson et al. 2018). As an example of positive influence, a meta-analysis of the impact of social media and mobile health apps revealed improvements in maternal physical health such as recommended weight gain and maternal mental health such as reducing post-partum stress (Cahn and Chen 2019). An example of a less consistently positive meso-level influence is divergent opinions on expectations surrounding the childbirth process which may occur within and across groups, including family, friends, and health care provider advice. For example, a women’s mother and spouse may have conflicting viewpoints on a natural birthing process, whereas in another, a women may hear conflicting opinions between her health care provider and a friend. Such sort of conflicting opinions or expectations is demonstrative of the complexity of socialized responses within a systematic marketplace (Vargo et al. 2017) and possibly a gender bias related to the source of the communication (Ferguson et al. 2018).
Perceptions of the legitimacy of communication sources within and across group, including one’s social network groups, is another force that operates at the meso-level. Women often use the Internet, apps and social groups to supplement information provided by health care providers but often do not discuss material found online with their health care professional (Narasimhulu, Karakash, Weedon and Minkoff 2016). Also, not all information is equally accurate and the influence of various blogging websites and expecting-mom social media groups feed into the customer journey and expectations in a mixed way. For example, Davies et al (2010a) also describe how the market presents an overwhelming barrage of items one should buy to prepare for this transition leading to an even greater sense of uncertainty.

Micro Forces That Impact Pregnancy/Childbirth/Post-partum

The micro forces that come into play during delivery are influenced by the unique confluence of two bodies who are exclusively reliant on the woman’s body. The state has historically exerted an interest in the fetus, and this interest is sometimes in conflict with the needs, desires and, occasionally, the health and well-being of the mother. There is no consistent agreement on how to adjudicate the competing interests of the mother, the in-utero child, the child during birth, the legal responsibility of the health care provider and the health care system. For example, in the United States:

The state’s interest in the fetus has been allowed, in exceptional cases, to be balanced against the mother’s autonomy in making medical decisions, and courts have ordered forced C-sections. But, other courts have found that balancing is not allowed when determining whether to force medical treatment on a woman because her rights to autonomy and bodily integrity are too strong. (Laufer-Ukeles 2011, 286)

And as the American College of Obstetricians and Gynecologists note (ACOG Committee Opinion 2005), the approaches that consider the woman and the fetus as separable and independent “tend to distort rather than illuminate, ethical and policy debates” (30). This leads to a complicated setting in which a woman is making decisions about her own body, raising thorny questions when she prefers something the medical field deems high risk for her birth choice (Holten, Hollander and de Miranda 2018).

Fortunately, most women do not face life and death decisions during delivery and micro level decisions center more around things like privacy, pain management choices, ability to move freely (e.g., few monitors and IVs attached at all times), whether the health care provider was one with which the woman had a pre-established connection and opportunities for skin-to-skin bonding right after birth. Several studies have found that the retrospective satisfaction that women express after delivery is more closely related to the woman’s sense of control during the process rather than the actual details of the delivery (Cook and Loomis 2012).

Because the role of expectations, particularly expectations for choice and autonomy, are important for the retrospective assessment of the delivery, it is worth considering the role of a pre-delivery document such as a birth plan in which the mother identifies her desires in advance in writing. Online documents templates for a birth plan often include the disclaimer “unless absolutely or medically necessary” which raises issues detailed above regarding who makes this assessment and whether the woman feels she can decline the intervention (Kaufman 2007).

A different perspective on birth plans is that, instead of being a definitive plan, it is a forum within which the expectant parent(s) learn about various options. In the process of thinking about these options, the parent(s) has discussions with the health care provider(s) and thinks about what would be ideal. However, having learned about what and why other options are used, should these become necessary then the mother is knowledgeable about what and why
changes may be made to the ideal delivery. For this reason, some medical professionals call the document a birth preparedness document rather than a birth plan (Fink 2017).

The actual proportion of births that have a birth plan ahead of time varies by location, health care provider and mother’s normative culture. Published numbers in the U.S. range from 12% (Afshar et al. 2016) to 48% (Afshar et al. 2018). Medscape provided an online survey regarding birth plans in 2017 (How Do You Feel About Birth Plans? 2017). The respondents included both M.D.s and other labor and delivery providers. Of the aggregate 370 respondents, 55% percent said fewer than ten percent of their patients prepared a birth plan, while 10% replied that more than ¾ of their mothers did. If the responses are isolated to just the 165 physicians who answered the survey, 66% percent said fewer than ten percent of their patients prepared a birth plan, while only 4% replied that more than ¾ of their mothers did. This suggests that while not uncommon, the use of birth plans as a means of communication may be geographically or culturally clustered in specific areas.

Even without formal birth plans, women enter into childbirth with expectations supported by conventional health care publications, websites, and providers as well as exposure to wide-ranging influences from social media, friends, family, and prior experience she has had with the medical system. An aggregate analysis of 14 studies on the birthing experience in Great Britain, Australia, Canada and the United States shows that women deliver children in a complex web of prior expectations, trust/distrust of their health care provider or the healthcare system, the speed with which decisions must be made, and the feedback they receive from others during the birth (e.g., you are doing a good job versus you just aren’t progressing) (Sanders and Crozier 2018). One of the conclusions of this synthesis was that some women cleave to the notion that she could freely choose among all her alternatives, a belief system Sanders and Crozier call the “menu birth”. The menu birth situates birth as a consumption choice, that is, one looks at the available options and choose what one wants for the consumption experience. However, Sanders and Crozier assess this level of choice in the birth process as fallacious, saying, “largely dependent on the wider healthcare context within which women experience their pregnancy, ‘menu birth’ is an illusion with availability remaining dependent on professionals’ facility and propensity to offer all choices equitably” (23). This suggests that the situational vulnerability related to childbirth is linked to access, laws and norms, the local structure of the health care system, and conditions that may change rapidly during delivery resulting in choices being made under duress.

**Primary Data to Supplement the Macro, Meso and Micro Analysis**

The primary data we draw upon to supplement our broader systems analysis are interviews conducted with women in the United States and Canada. Each interview uses the lens of a customer journey for a retrospective look at the pregnancy, the approach to the early stages of delivery, how the delivery ultimately unfolded and the subsequent post-partum weeks. By including the role of a birth plan, or the choice not to use a birth plan, the interviews consider the role of a codified written document as a means for crystalizing, communicating and ultimately evaluating a consumer experience. While the core experience is the birth mother’s, the childbirth experience also reflects the hopes, fears, and experiences of her partner, family, and peers. If a birth plan is drawn up by the mother, it becomes a metric against which the lived birth experience is held when customer satisfaction is retrospectively assessed (Cook and Loomis 2012; Mei, Afshar, Gregory, Kilpatrick and Esakoff 2016).

**References**


[https://doi.org/10.1371/journal.pone.0192523](https://doi.org/10.1371/journal.pone.0192523)
Abstract

Making the future more sustainable is arguably a very challenging task if not a ‘wicked’ problem, which is recurrently addressed in macromarketing. Not only does sustainability incorporate social, environmental, economic and cultural elements, but there is also the question on whose terms and in whose interests sustainability should be targeted. To these aims, we review how European citizens envision desirable and sustainable futures. As data we use citizen visions from three involvement exercises, in which citizens drafted a total of 298 visions. We use the methodology of topic modeling to identify how people’s agendas for a sustainable future are expressed in the examined visions. Twenty such agendas are identified and we further examine how these agendas relate to sustainable innovation, which is one of the key ways to reach better sustainability. Three agendas are highlighted in the context of sustainable innovation and relate to use of natural resources: ‘System resources’, ‘New food markets’, and ‘Farming innovations’. ‘Developmental education’ is understated as an agenda in comparison to all-encompassing contexts. Similarly, agendas concerning ‘Collectives’, ‘People’s channel’ and ‘Science’ are to their character more closely related to general sustainability targets than sustainable innovation. The final section of the paper discusses these results and the application of methods developed for natural language processing (of which topic modeling is an example) in macromarketing.

1. Introduction

What is it that people want in a sustainable future? This seemingly simple question opens up a myriad of issues, which macromarketers are addressing on a regular basis. In particular, the critique of unsustainable consumption patterns and systems has been of recurrent interest in macromarketing. Assadourian (2010) argues that dominant interests in business, the media, governments, and education contribute to detrimental consumerism. Kemper and Ballantine (2017) tackle obesity, climate change and poverty from a transition perspective, highlighting that the social aspects of macromarketing need to be addressed when changing undesirable and collective behavior. Kennedy (2017), in turn, calls for a defragmentation of macro-social marketing to better address holistic systemic change. In a recent article, Little et al. (2019) propose macro-social interventions to address the shortcomings of unsustainable production and consumption systems. Indeed, questions such as these can deservedly be called important and also ‘wicked’ in the sense that there are no obvious if even any workable solutions to them (Wooliscroft 2016; Rittel and Webber 1973).

At the same time, there are instances in macromarketing studies where individuals and their collectives are seen as a source of change for the better. Kozinets et al. (2008) argue that consumers can produce collective innovation both as an outcome of their consumption and as active members of consumer communities. Chaudhury and Albinsson (2014) apply the construct of citizen-consumers to show how people contribute to change in in the food system. Hogg (2018) investigates conceptually the power and role of consumers to shape the macro
environment, finds them to be small, and asks what the focal role of consumers could be in changing ecosystems.

Accounting for these research approaches in macromarketing, we explore how people in their roles of citizens and consumers could contribute for more sustainable futures through agenda setting in research and innovation. This paper reviews the starting point of such exploration, namely the question of what people would prefer sustainable futures to be like. As data, we use a large number of visions on sustainable futures, which were authored by citizens in three major European research projects that aimed to influence the European research and innovation program Horizon 2020. In particular, we examine how citizen visions that connect closely to sustainable innovation differ from those, which are all-encompassing in character.

To these aims, the upcoming section describes the policy background of the paper as it connects citizen engagement and sustainable innovation to the European Union’s efforts to invite publics to influence the agendas of research and innovation. This is followed by topic modeling of the citizen visions authored in the three examined citizen engagement projects, which reveals differences in topical distribution of citizen visions across the three projects: Civisti (2011), CASI (2014) and Cimulact (2016). The citizen visions articulated in the CASI project are used as a focal point because they target sustainable innovation. Indeed, when sustainable innovation is seen as a specified means to approach the future, the importance of system resources such as energy and production is accentuated, and education is seen as a more moderate driver for change. New food markets and farming innovations, in turn, emerge in citizen visions which consider sustainable innovation. The final section of this paper discusses these findings and accrued methodological learnings from the perspective of macromarketing.

2. Open agenda setting for research and innovation programs

Citizens across Europe have in recent years systematically been invited to participate in agenda-setting for European research and innovation. To this aim, the European Commission has funded research projects in which citizens have articulated visions on sustainable futures, thereby forming citizen-induced interests for the European Union’s Horizon 2020 program. Policy inclusiveness through citizen engagement indeed has the potential to introduce new innovation agendas alongside simply informing the public about scientific and technological advances (see Rip 2016). A total of 298 such visions were authored by citizens in three major European-scale projects: Civisti (2011), Casi (2014) and Cimulact (2016). These visions were followed by backcasting procedures (Quist et al. 2011; Robinson et al. 2011; Vergragt and Quist 2011), which built pathways and roadmaps for European research and innovation to reach the visions desired by the citizens. Such a procedure builds path-dependency (see Layton and Duffy 2018) towards desired futures, which further highlights the role of open and inclusive agenda setting.

But what if citizen engagement through open agenda setting implicitly presupposes that the roadmap to the future should be reached in a particular way? Could this affect the visions that the citizens articulate and if so, then which kinds of topics would be accentuated? This paper examines these interesting questions by analysing the visions co-authored by citizens in the three aforementioned projects. The CASI project serves as the focal point of analysis as it had a specific focus and approach – that of sustainable innovation – and citizen engagement was not the only key activity accomplished in the project. Civisti and Cimulact, to the contrary, were all-encompassing in terms of focus and built on the outcomes of citizen engagement. The citizen engagement methodology itself was uniform across these projects, which makes the visions readily comparable, and differences in the visions collected across the engagement exercises have been observed in earlier research (Repo and Matchoss 2018).
The research design of this paper is presented in Figure 1. Citizen visions and their latent agendas of the CASI project serve as the focal point against which contributions from the Civisti and Cimulact projects are compared. Such comparison is apt to show how citizen perspectives on futures which highlight sustainable innovation (CASI) differ from all-encompassing citizen perspectives on future. Three kinds of comparative data are sought for: 1) citizen agendas which are specific for sustainable innovation, 2) citizen agendas which are shared between sustainable innovation and all-encompassing perspectives but possibly to varying degrees, and 3) citizen agendas which are evident in all-encompassing perspectives but missing or limited for sustainable innovation. These three sets of data are numbered accordingly in Figure 1.

![Figure 1. Research design of the paper with three types of comparative data.](image)

The profound CASI focus on sustainable innovation was reflected in all of its activities, including the activities that involved citizens in research agenda setting. For this particular reason, the citizen visions articulated in the CASI project are differently targeted than those citizen visions from the all-encompassing Civisti and Cimulact projects. Previous work has demonstrated this to be the case (Repo & Matschoss 2018), and the paper at hand looks in greater detail at the differences. The upcoming sections further elaborate on the relevance of engaging citizens in open agenda setting while arguing for the use of citizen visions authored in the CASI project on sustainable innovation as a focal point for comparison against all-encompassing citizen visions.

### 2.1. Engaging citizens in open agenda setting

In recent years, activities engaging citizens in open research agenda setting have been carried out in many parts of the world (OECD 2017). In Europe, the EU-funded Civisti, CASI, and Cimulact projects demonstrated how such engagement can practically feed into the formulation of detailed research topics and give direction to research programs alike. These experiments mark an emerging shift towards an earlier involvement of citizens in research and innovation, in particular at the level of framing agendas and objectives to be funded by the European Commission in its research program. While earlier citizen science initiatives have engaged citizens in collecting research data and helped improve innovations close to markets,
researchers, politicians and stakeholder organizations alike have argued for more open and earlier engagement. Agenda setting is important in this respect as it brings issues to the attention of publics and elites (Birkland 2006, Howlett et al. 2009).

There are complementary arguments for citizen engagement, which range from functionality and neo-liberalism to deliberative, anthropological, emancipatory and post-modern concepts (Renn and Schweizer 2009). The main, principled argument for more citizen engagement is both functional and deliberative in nature: since research and innovation shapes the future of our society and when it is publicly funded, it is arguable that citizens should have a say over the way, in which research funding is spent. A common objection to this argument is that only professionals and experts know how to do research and that citizens are therefore unqualified to make decisions about research objectives. Yet citizen engagement does not mean handing over complex decision making to citizens alone but rather to offer them a possibility to become heard in decision making. This may have practical relevance as it has been noted that citizen influenced agendas indeed differ from those set through conventional processes (Rosa et al. 2018, Repo and Matschoss 2019), and thereby contribute to new innovations which could better be accepted by the public at large.

2.2. Targeting sustainable innovation in CASI

The CASI project set out on a challenge to explore sustainable innovation and to define a management and assessment framework that was to be informed through various forms of public engagement to especially target sustainable innovation. The project was initiated because it was considered in the European Commission that there was conceptual ambiguity around the concept of sustainable innovation that span both academic and practitioner communities alike. Indeed, the concept, on the one hand, relates to concepts such as eco-innovation or green innovation, while, on the other, it can also be understood to touch sustainability and sustainable development. Therefore, the CASI project was designed with the intention to bring together different societal actors, including citizens, in order to understand better what sustainable innovation means from their different perspectives. In fact, societal actors have various expectations even towards the concept of sustainability itself, a core concept behind sustainable innovation. The project thus set a goal to map on-going sustainable innovations and to develop a coherent understanding of sustainable innovation as a concept.

CASI ran alongside on-going debates as to what sustainable innovation actually entails, and within a context, where there was little agreement on both of its scope and emergent validity. Therefore, it was an important ambition of the project to attempt to establish sustainable innovation as a valid construct informed by both praxis and innovation theory. Combining multiple knowledge streams, CASI explored sustainable innovation as a concept, as well as through hundreds of actual cases of sustainable innovation, to validate the importance of innovation within the context of sustainability. It applied and developed the tools and processes to enable multiple societal actors to convene into a common process of co-creating and sharing knowledge, also informing policy agenda-setting.

In the case of sustainable innovation, the arguments for citizen engagement in open research agenda setting are based on the complexity of societal change towards sustainability: indeed, the transition to a more sustainable society is a challenge of immense complexity, a wicked problem (e.g. Wooliscroft 2016), that requires the engagement of all walks of society. Research priorities identified by citizens in the CASI project differed from priorities set by the experts (Repo and Matschoss 2019) and stakeholders engaged and from those set by the Commission (SC5 priorities in Horizon 2020). Indeed, when it came to identifying the kind of research
needed to achieve identified priorities, citizens prioritized other research activities than experts and stakeholders (Bedsted et al. 2016, Repo and Matschoss 2019). In general, the latter tended to be more instrumental, technically oriented, narrower in scope, and less societal. Another important observation and argument for citizen engagement in research agenda setting for sustainable innovation is the fact that citizens favor research agendas that will enable them to take an active part in the transition to a more sustainable society. This is an important difference to research agendas framed by experts that emphasized less the social aspects of research agendas, exemplified by a research agenda suggestion called “More green in cities”, which was the second last in the list of experts but among ten most preferred in the list of the citizens. (Repo and Matschoss 2019).

The upcoming sections describes methodologically how we identify that futures specifically accounting for sustainable innovation differ from those with a wide focus. The results reveal the kinds of topics that citizens wish sustainable innovation to address.

3. Data and methods: Topic modeling of citizen visions

Topic modeling as applied in this study allows an examination of the future from a systemic perspective, i.e. as a societal marketing system, where networks of people participate in economic exchange that responds to customer demand (see Layton 2007, 2018 for working definition for marketing systems). In the case of citizen visions, accordingly, statistical co-occurrences of words contribute to ‘topics’, which are used to examine the full corpus consisting of 298 visions.

The methodological approach of topic modeling echoes with Ekici and Ekici (2016), who advocate macromarketers to consider bayesian statistics in the domain of ethics. Accordingly, Wooliscroft (2016) welcomes bayesian analysis in macromarketing, which has been spurred by developments in both computing power and software development. As Ekici and Ekici (2016) demonstrate, novel methodologies provide new tools for macromarketing analysis and can reveal issues and connections which were not as observable before.

To examine if targeted engagement activities can produce topically different sets of visions, we review the results of three citizen engagement projects: Casi (2011), Cimulact (2014) and Civisti (2016). These projects all applied a citizen engagement procedure first developed in the Civisti project that aimed to deliver citizen-driven research ideas into the design of research programs. The first step in this procedure is to create visions on sustainable futures with groups of citizens in different countries. Participating citizens were selected based on similar principles in all three project: no specialized knowledge on the themes of the workshop and as varied background of participants as possible. National representativity in terms of population structure was not strived for. This paper utilises the citizen visions created in these projects as the empirical research material (Rask and Damianova 2009, Kaarakainen et al. 2015, Riisgard et al. 2016). Example 1 introduces one citizen vision from the CASI project, which focused on sustainable innovation.

Urban farming

Urban farming means farming on the roofs, balconies and gardens of urban cities. This would bring all spaces of cities into beneficial use. For houses with flat roofs, solar panels could be used as roofs and the greenhouses would be situated underneath them. Urban farming would bring more vibrancy and nature into urban environments. In addition, urban farming would create carbon sinks, which are needed in urban environments; it would contribute to local food production, and commit people to communal local activity, which transcends generations.

Example 1. Excerpt from citizen vision on urban farming, which was authored in the citizen panel in Finland in the CASI project.
The procedure and the results of these projects have been examined and published previously for respective projects for example in Gudowsky et al. (2016), Repo et al. (2017) and Rosa et al. (2018). The study of Repo and Matschoss (2018) is so far the only analysis which combines and compares data from all three projects, and argues that project settings indeed affected the agendas evident in the citizen visions. As there already are publications that go into detail in terms of procedure and results, we here only shortly review the main targets and some basic details of these projects. The target of the CASI project was to examine sustainable innovation and the role of the citizen engagement was to support a creation of a general methodology for the assessment of sustainable innovation. Accordingly, the CASI project involved citizens in 12 countries and contributed to 50 visions in 2015. The Civisti and Cimulact projects were of an all-encompassing character in terms of outreaches, and to this aim Civisti involved citizens in 7 countries, contributing to 69 visions in 2009, and Cimulact in 30 countries to 179 visions in 2015-2016.

The altogether 298 citizen created visions on sustainable futures form the corpus of our analysis. The corpus was analysed with a topic modeling methodology (Blei 2012, Blei et al. 2003) by use of the Mallet toolkit, which is a machine learning language processing tool for natural language texts (McCallum 2002) . In the analysis, we applied Latent Dirichlet Allocation (LDA) to discover topics in the visions corpus with model optimization every 10 sampling iterations. In the next section, we present the results of the topic modeling.

4. Results: Topics from the engagement projects

For the analysis of the citizen visions, we applied 20 topics to analyse topics emerging in the visions in the three engagement projects. This rather large number of topics was selected to examine in detail how the visions citizens articulated in the CASI project, which targeted sustainable innovation, corresponded to those articulated on the more generally oriented Civisti and Cimulact projects. In a previous work, Repo and Matschoss (2018) showed that there indeed were topical differences between the citizen visions in the three projects, and our work at hand attempts to review this observation in greater detail. The number of 20 topics is also in good relation to the procedures, which were applied in the analysis of visions in the three projects (Casi: 8 topic clusters, Civisti: 37 topics, Cimulact: 12 domains with 29 underlying needs).

The analysis contributes a Dirichlet parameter for each topic, which represents the relative weight of that topic in the full corpus, and key words for each topic as well as other diagnostic information. We used these keywords and in particular their exclusivity to their respective topic as the grounds for labelling of the topics. Table 1 presents the topics, their Dirichlet parameter and 20 top key words.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Dirichlet parameter</th>
<th>Keywords</th>
</tr>
</thead>
<tbody>
<tr>
<td>System resources</td>
<td>49.09</td>
<td>energy, system, resources, development, citizens, production, food, education, quality, local, sustainable, individual, city, environment,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>public, knowledge, change, society, common, social, products, transport, green, healthy, vision, access, economic, environmental, people,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>responsible, political, care, renewable, power, sources, activities, good, learning, support, long, economy, small, human, water, awareness,</td>
</tr>
<tr>
<td>Developmental education</td>
<td>41.73</td>
<td>people, life, work, education, vision, society, health, family, time, children, social, community, technology, future, school, living, world,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>based, information, working, free, natural, live, personal, developed, level, companies, schools</td>
</tr>
<tr>
<td>Costs and benefits</td>
<td>9.82</td>
<td>benefits, negative, population, high, needed, cost, services, decrease, devices, agriculture, legislation, room, animal, product, innovation, type, policies, saving, hand, effects, policy, distributed, action, animals, level, functions, single, case, problems, infrastructure, capital, control, attitudes, institutions, risk, clear, conflict, supporting, beauty, experts, providing, welfare, traditional, bike, light, united, adoption, exercise, collaboration, creating</td>
</tr>
<tr>
<td>Production</td>
<td>2.32</td>
<td>cells, senior, popular, thing, professionals, engage, gardening, compulsory, manufacturing, orientation, lands, ethnically, root, listen, powered, agreed, theatre, cycles, subsidies, built, located, shaping, rewards, popularization, unbiased, functioning, hear, insurance, sustaining, works, foundations, specialization, majority, conversation, intelligent, limits, universities, maturity, privacy, roles, act, makers, obtained, possibilities, nutritious, reduce, r&amp;d, high, intangible, deficiencies</td>
</tr>
<tr>
<td>Treatments</td>
<td>2.10</td>
<td>called, financed, treatments, remains, travelling, practical, implemented, debate, continuing, criminal, visual, heating, elementary, recommend, held, materialism, reporting, separate, feel, purpose, hands, representatives, include, realizing, salad, fathers, balancing, payment, bankers, numerous, enhancement, sized, sweden, arriving, reserved, total, organs, methane, obligation, military, determination, doctors, digital, specialist, parent, presents, experiences, wave, reevaluation, reward</td>
</tr>
<tr>
<td>People’s channel</td>
<td>1.79</td>
<td>language, families, dying, electric, transportation, research, countries, languages, channel, weapons, means, programs, employment, stay, disability, mother, bulgaria, full, aging, easily, year, abroad, inclusion, council, fields, identity, kindergarten, doesnt, times, starts, continue, fusion, realized, planning, africa, individual, form, dependsents, legacy, afb, perform, translation, father, union, funds, learn, contents, hungarian, sofia, television</td>
</tr>
<tr>
<td>Improvements</td>
<td>1.62</td>
<td>analysis, secured, vehicle, shift, blind, workshops, enabled, components, renovation, retailing, motivate, supports, efforts, cares, fission, cafe, intelligence, kitchen, welcoming, hearing, wanted, priorities, heart, pick, neighbors, consumable, norm, urbanisation, die, debates, evaluation, depend, offers, extended, polluted, illnesses, stay, wouldnt, sensors, opinion, valued, abolishment, assistance, preserved, considerable, tradition, smes, dissemination, return, antibiotics</td>
</tr>
<tr>
<td>Infrastructures</td>
<td>1.61</td>
<td>plant, productivity, disposal, functioning, neutral, present, bigger, relax, cease, circumstances, passenger, travels, preventive, sustaining, break, lessons, gas, activity, earth, accordance, find, utopia, valuable, money, manner, investments, comprehensive, tendencies, transporting, parental, dependencies, rule, inability, table, owned, cheap, greenery, opening, left, background, humane, signed, households, plot, features, fairly, mentioned, ideal, intellectual, toll</td>
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<tr>
<td>Accomplishment</td>
<td>1.40</td>
<td>dimensions, realized, forced, low, begins, employers, controls, children's, introduce, controlled, rely, losing, treatment, learning, foundation, corporate, compulsory, greater, representatives, involvement, characterised, typical, tank, identity, inequality, autonomous, compost, shops, diets, economics, peculiarities, forms, platform, threatened, equipment, real, multiculturalism, provided, bio, developed, increase, outlets, dry, curriculums, substitute, prenatal, maximize, cohabitation, warm, intelligences, daughter</td>
</tr>
<tr>
<td>New food markets</td>
<td>1.34</td>
<td>farming, urban, insects, cannabis, supports, barriers, reducing, distributive, immigrants, sales, consumers, buy, gardener, surrounding, markets, inhabitants, improved, construction, oriented, large, technological, ecosystems, villages, assumption, provide, circular, objectives, focus, enables, sale, roofs, consuming, harvest, importance, allocation, pharmaceutical, realisation, principles, realise, enhancing, focused, stimulated, decreases, locations, seeds, customers, clean, attractive, corridors, physically</td>
</tr>
<tr>
<td>Common cures</td>
<td>1.23</td>
<td>thinking, cure, cooperative, maintain, abuse, demands, determine, zone, unconditional, cleaner, governance, giving, resolved, equipped, code, possibly, teleportation, autonomous, specialized, consists, simple, businesses, lines, tunnel, forward, learns, physics, breakthrough, educate, ago, learned, solely, cellular, choosing, walk, opens, generational, interesting, transports, todays, determination, interested, decide, ethnic, strategies, expensive, applicable, intensive, action, producers</td>
</tr>
</tbody>
</table>
The results of the modeling show that two topics are of a greater magnitude than the others in the citizen visions: ‘System resources’ and ‘Developmental education’ with Dirichlet parameters of 49.09 and 41.73. The emergence of the topic of ‘System resources’ appears logical as citizens were instructed to draw visions which were desirable and achievable. Hence,
considering available resources in a systemic context is a functional foundation on which to connect visions. The topic of ‘Developmental education’, in contrast, relates to approaching and welcoming desirable futures. The topic of ‘Costs and benefits’ also receive more attention than the remaining 17 topics with a Dirichlet parameter of 9.82 and relates to the argumentation for better futures.

The topics are visualized in Figure 2 to review how the 20 identified topics relate to each other. To accomplish this, we examined the connections between 50 keywords in each of the 20 topics by use of the Gephi visualization and exploration software. The data in Figure 2 is visualized using the modularity algorithm to identify clusters, which differ from random distribution (Blondel et al. 2008) and the Yifan Hu layout which reduces complexity through a combination of force-direction with a graph coarsening technique (Hu 2005). The sizes of the key words reflect their frequencies in the corpus. The basic logic of the visualization follows that of Underwood (2012), except that all topics were included due to the smaller dataset.

Figure 2. Visualisation of topics in citizen visions.
As expected, there are connections between the topics as words in citizen visions are not completely exclusive to topics. Nevertheless, these connections are few in number due to the methodology of topic modeling, which attempts to find latent patterns in the corpus. To the aims of this paper, it can be observed that the two main topics in the citizen visions, ‘System resources’ and ‘Developmental education’ are more closely connected than any two other topics. ‘New food markets’ and ‘Farming innovations’ constitute two separate topics although they can conceptually be linked to each other through food. It can also be observed that the topics of ‘Collectives’ are separate from ‘Communities’ as well as ‘People’s Channel’. ‘Science’ to its part connects to a number of other topics such as ‘Technodreams’, ‘Production’ and ‘People’s Channel’.

Although there indeed are connections between the topics, the visualization confirms that the topics have independent characters. This is indeed is the rationale for applying topic modeling, i.e. to discover latent topics in a corpus. It can be assessed that topic modeling performed well in this analysis, and that the data visualization further validates the implicit assumption that topics indeed form meaningful units of analysis which are sufficiently separate from other respective units. In the next section, we discuss the topical distribution of topics across projects and its implications for sustainable innovation.

5. Discussion: Topical distribution of topics across projects

As the aim of this paper is to examine how topics evident in the citizen visions viewing the future from the perspective of sustainable innovation, i.e. the CASI project, compare to those from all-encompassing citizen involvement projects (Cimulact and Civisti projects), we focus on the topics which exhibit greatest distributional differences across projects. These include the aforementioned two largest topics (‘System resources’ and ‘Developmental education’) and ‘New food markets’, ‘Farming innovations’, ‘Collectives’, ‘People’s channel’, and ‘Infrastructures’. Table 2 shows how these topics are distributed across the citizen visions developed in the three involvement projects. The full table of how topics are distributed in the citizen visions in the three involvement projects is presented in Appendix 1.

Table 2. Topical distributions of citizen visions across projects. Key differences from the perspective of CASI-specific involvement is marked in superscript (+/-).

<table>
<thead>
<tr>
<th>Topic</th>
<th>CASI</th>
<th>Cimulact</th>
<th>Civisti</th>
</tr>
</thead>
<tbody>
<tr>
<td>System resources</td>
<td>48.3%</td>
<td>31.4%</td>
<td>21.8%</td>
</tr>
<tr>
<td>Developmental education</td>
<td>19.1%</td>
<td>41.0%</td>
<td>33.2%</td>
</tr>
<tr>
<td>New food markets</td>
<td>13.3%</td>
<td>0.3%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Farming innovations</td>
<td>4.8%</td>
<td>0.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Collectives</td>
<td>0.0%</td>
<td>7.5%</td>
<td>0.0%</td>
</tr>
<tr>
<td>People’s channel</td>
<td>0.1%</td>
<td>0.4%</td>
<td>13.2%</td>
</tr>
<tr>
<td>Science</td>
<td>0.0%</td>
<td>7.9%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Table 2 shows that citizen involvement in the CASI project which focused on sustainable innovation indeed contributed to a different topical balance from the two more encompassing projects. Firstly, the focus was more on system resources (48.3% for CASI vs. 31.4 and 21.8% for the two others). This is well in line with that sustainable innovation relates to the material world and the efficient use of resources. Secondly, ‘Developmental education’ was less accentuated in the CASI project, which can be explained by that while sustainable innovation requires knowledge and skills, it is not seen as much as an approach to comprehending the future and changing people. Instead, sustainable innovation is more about implementing knowledge than enlightenment of publics. A contingency table analysis further indicated that
the differences were statistically observable at the $p < .01$ level concerning the two topics and the three involvement projects.

One other topical focus is also striking in the citizen visions in CASI. ‘New food markets’ and ‘Farming innovations’ both relate to novel ways of producing and consuming food and are highlighted as topics in CASI while being almost non-existent in the two other involvement projects. This result brings an additional perspective on sustainable innovation as it highlights in which fields such innovation should be emphasized.

Further, some topics did not emerge in the citizen visions in CASI. The future was seen from the perspective of people as ‘Collectives’ in the Cimulact visions and ‘People’s channel’ in the Civisti visions. In this respect, focus on sustainable innovation seems to take focus away from people. ‘Science’ constituted a particular topic in the Civisti project, suggesting a significant demarcation from innovation. Finally, there was only one major topic in CASI, ‘Costs and benefits’, which it shared with only one of the two all-encompassing projects (see Appendix 1). As this topic relates more to assessment rather than field or issue, it further confirms that topics emerging in the context of sustainable innovation indeed differ from those from all-encompassing contexts.

6. Conclusion

Making our futures more sustainable is arguably one of the most important and perhaps also ‘wicked’ challenges of today. Scholars in macromarketing have addressed this challenge by examining the limited sustainability of current consumption levels and patterns (see Assadourian 2010, Kemper and Ballantine 2017 and Little et al. 2019). While analytical assessments of problems certainly assist in realizing how they could be solved, attention to ways that could solve or at least target solutions to the problems are also welcome. This paper has approached such ambitions from a systemic, people centered perspective by examining the visions of sustainable futures that people have authored in engagement projects. These visions constitute citizen agendas for the European research and innovation agenda in general and sustainable innovation in particular. In this way, the paper balances between people’s wishes and the overall need for better sustainability, both being topics which are covered in macromarketing. Research and innovation policy interest continues in Europe as open research agenda setting has a high priority in the preparations of the next European framework program for research and innovation (European Commission 2017).

The concept of sustainable innovation, i.e. innovation which contributes to sustainable futures, becomes in the visionary processes defined and contextualized by citizens. Citizens focus on systemic resources such as energy and production when they see innovation as a direction towards sustainability. New food markets and farming innovations further accentuate the citizen take on sustainable innovation. By contrast, education, which is a competing approach for citizens to embrace the future, is less accentuated in this context. Further, community driven and social agendas are not in citizen takes on sustainable innovation, which challenges the concept of social innovation (see Avelino et al. 2017; Cajaiba-Santana 2014). Indeed, the concept of sustainable innovation is something quite distinct from social innovation when people consider the future. These results confirm that the rationale for inviting people to contribute to open agendas works also in focused contexts.

The analysis further shows that macromarketing studies can benefit from the application of methodologies developed in natural language processing and machine learning. Methodologies such as topic modelling make complex and large data sets more approachable in research, which can be problematic in established qualitative and quantitative research procedures (see Repo et al. 2017). Due to the digitalization and commercialization of everyday life, this is an
opportunity in which macromarketers are well positioned to tackle. When doing so, citizens may also become more established and empowered system actors (cf. Hogg 2018).

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Appendix 1. Topical distributions of citizen visions expressed in percentages according to the three examined projects.

<table>
<thead>
<tr>
<th>Topic</th>
<th>System resources</th>
<th>Developmental</th>
<th>New food markets</th>
<th>Farming innovations</th>
<th>Costs and benefits</th>
<th>Treatments</th>
<th>Production</th>
<th>Improvements</th>
<th>Collectives</th>
<th>Common cures</th>
<th>Intergenerational</th>
<th>Accomplishment</th>
<th>Communities</th>
<th>Arts</th>
<th>Solutions</th>
<th>Peoples channel</th>
<th>Science</th>
<th>Technodreams</th>
<th>Business restraints</th>
<th>Infrastructures</th>
</tr>
</thead>
</table>
Further Reflections on Macromarketing Pedagogy
Alex Reppel, School of Management, Royal Holloway, University of London, UK
Darryn Mitussis, School of Business and Management, Queen Mary University of London, UK

In 2012, one of us reflected on and reviewed Mark Peterson's (2012) textbook Sustainable Enterprise: A Macromarketing Approach. The review provided an opportunity to critically reflect on the struggles and dilemmas faced when setting up a new masters programme.

Seven years later, it is, useful to reflect again, thinking how our views on Macromarketing education have developed, how the masters programme has evolved and where Macromarketing education might develop in the next seven years. This is particularly true because, in the intervening years a number of serious fissures in society have developed, with marketing and consumption inextricably intertwined. These include, use of the micro-targeting techniques of consumer marketing to create political echo chambers, the convenience economy and the consequences for labour, and the clear and present danger posed by global warming, diabetes and obesity. In this paper, we focus on the first two of these and on the tension between the developmental and critical schools of Macromarketing and the real-world issues of technology and labour.

We begin with a brief review of key arguments made in 2012, followed by a discussion of what we now believe the original commentary missed.

In part, the 2012 commentary was an attempt to document the development of an interdisciplinary MA programme at one of the authors' institutions. At the time, the name of the programme was Markets, Consumption & Society, which was since changed to Consumption, Culture & Marketing. The new title better reflects the programme's interdisciplinary character, which is jointly offered by marketing and sociology teaching groups. Consequently, the programme is positioned, according to the Programme Handbook, as "an innovative programme inviting students to critically explore their lived experiences within the consumer society".

The key term here is the call for critical exploration, positioning the programme squarely within the "critical" school of Macromarketing thought. Contrasting this school with the probably more dominant "developmental" school was a major focus of the original commentary. In fact, the differences between both schools forms the basis for many, if not most, Macromarketing discourses, and is noted in Peterson's (2012) textbook and the review and commentary.

In the original commentary, this was illustrated in the context of sustainability:

The "developmental school" suggests that markets and marketing systems can contribute to a sustainable future. The "critical school" denies such an optimistic outlook and assumes that marketing systems reflect "the neoliberal economic philosophy" and thus positions such systems "as part of the sustainability problem". (Reppel 2012, p. 398, with quotations from Mittelstaedt and Kilbourne [2008, p. 17].)

Despite these differences, both schools generally have shared normative positions and a desire to achieve them (for example, with respect to inequalities). However, considerable differences exist in terms of facilitating change. The developmental school relies on marketing and markets to facilitate growth to achieve the desired change. The critical school is concerned with the structures within which marketing and markets operate. In the commentary, this was expressed as follows:
while the developmental school supports the purpose of macromarketing to save the world, with marketing, the critical school supports the purpose of macromarketing to save the world from marketing. (Reppel 2012, p. 398, drawing on Fisk [2006, p. 216] and Witkowski [2010, p. 4].)

Programmes that invite critical exploration, such as Consumption, Culture & Marketing, demand reflexivity and a desire to draw out Marketing's societal implications. In the original commentary, this was illustrated by the following statement, once again contrasting the developmental and critical schools:

it is not enough to add "a social conscience" to marketing systems and practices. Rather, we must acknowledge that ultimately all marketing activity is potentially harmful to society. (Ibid., p. 400.)

Further illustrations of how the critical school deals with Marketing's societal implications relate to (in-)equality and technological progress. As critical Macromarketers, we continue to oppose what may be thought of as a naive reliance on resources, such as money and technology, based on the assumption—hope perhaps—that more leads to better. In the original commentary, this was illustrated by attempt to "withstand environmental or economic crisis [by] accumulat[ing] sufficient capital for oneself" (ibid., p. 401), or "to just emphasize the capacity of technology to empower people" without a thorough understanding of its possible consequences (ibid., p. 400).

However, we also acknowledge that critical exploration ultimately results in a discussion of how what has been criticised can be overcome and/or avoided. This, then, is what Macromarketing education has to offer: Teaching through critical reflexivity and a dialogue between the two schools of Macromarketing thought.

In this reflection, we draw on a number of key political and technological events from the last seven years where Macromarketing ought to inform our understanding of what has happened, and therefore are right to consider for inclusion in Macromarketing education. These examples serve to illustrate how profoundly different are the developmental and critical schools' likely responses in the classroom. We focus on three sets of events that bother our students: the (re)emergence of political popularism and extremism, the role of consumer technology (especially social media) in crises of privacy, the convenience economy and the consequences for labour.

Our reflections will also draw on the academic strike over pensions, which culminated in a 14 day strike across the UK's traditional universities because, as with these three issues, it is ostensibly unreflexive marketisation that is destroying the opportunities for discussions about the appropriate role for markets and technology in a just and humane society. This is an important development because, the original commentary made no mention of the role of trade unions and a search for the term in the archives of the Journal of Macromarketing returns nothing.

(Macro)marketing, Politics and Social media

In the seven years since the publication of Peterson's (2012) textbook, the role of marketing and social media in the political system received much scrutiny. The 2016 presidential and congressional elections are estimated to have cost US$6.5 billion. In both the US elections and the Brexit referendum in the United Kingdom, the role of social media, including botfarms and fake accounts, particularly on Facebook and Twitter, has come under scrutiny. It would appear that the technology of 21st century marketing practice, as applied to political marketing, has moved from segment, target and position to isolate, target and incite.
Simultaneously, we have seen the rise of public concern about data privacy and increased academic and public intellectual work around "surveillance capitalism". Facebook was fined for data breaches related to Brexit campaigns and fined €110m for misleading the European Commission over data privacy issues ahead of its takeover of WhatsApp. At the time of writing, Facebook and the US Federal Trade Commission are negotiating a fine for privacy violations and is under investigation by the Irish authorities for a massive data breach, which could result in a fine over one billion euro.

The real concern here is that big data and artificial intelligence systems can now be developed to refine traditional marketing techniques to systematically influence behaviour in ways that are not apparent to those being influenced. In Zuboff's (2019) view, target, segment, position becomes "target, predict, influence".

The absence of labour
Uber was only three years old when Peterson's (2012) textbook was reviewed in Macromarketing. Deliveroo had yet to be founded. These companies have been held up as the exemplars of the convenience economy and epitomes of consumer sovereignty. In terms of labour practices they are almost perfectly the opposite, with systems that use big data to gamify employment relations. Organised labour has been campaigning, including using the courts, in the US, Canada and the United Kingdom, to see gig-economy workers reclaim the types of employment rights, in terms of holiday pay, sick leave and overall financial security, that many academic Macromarketers may take for granted.

Organised labour has been instrumental in fighting the kinds of issues that also concern Macromarketers, including gender and other forms of inequality, forced labour and slavery, homophobia. One of the arguments put forward to attendees of the 2019 seminar is thus that those serious about Macromarketing education may not repeat the same mistake. The role of trade unions, while under-appreciated at a time of persistent (neo-)liberalisation, must not be ignored in the classroom. How else will future generations of Macromarketers—or rather Marketers—appreciate what is at their disposal when responding to increasing levels of inequality?

Implications for Macromarketing education
In both of these cases, the developmental and critical schools of Macromarketing broadly agree with the need for marketing education to address these matters. Both would broadly agree with the desired outcomes for society, that our teaching should help develop a more just society and that the marketing practices that students develop on our programmes should not hinder that objective. Then comes something more controversial. Our argument is that a Macromarketing education can only work if choreographed in three steps. The first step is to sensitise students to the problems of inequality, the importance and challenges of privacy, the treatment of labour, the environment and so forth. The second step is to introduce the developmental school and the possibility to refine marketing practice to address these issues. The third step is to introduce students to the worrisome possibility that no amount of reform of marketing practice can bring about the outcomes we want. This, of course, presents a new set of challenges, including the need to develop and present credible alternatives to the global fixation on growth and the reliance of markets for allocation of resources.

While this critical endeavour is no doubt worthy, unfortunately, the continued marketisation of higher education may make attracting students to a programme of this nature increasingly difficult.
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Consumer behavior responses to the disposal of potentially harmful products and subjective wellbeing

Sergio Enrique Robles-Avila, University of Texas Rio Grande Valley

This research explores the factors that may influence consumers to engage in activism behaviors towards the disposal of potentially harmful products. Examples of potentially harmful products may be old cars, old tires, chemicals, and pesticides. Past research suggests that consumers in developed countries often are more engaged in activism behaviors than consumers in developing countries. This research explores the differences between US consumers and Mexican consumers.
Fairtrade Towns: A Community Based Social Marketing Perspective in Promoting Ethical Consumption
Anthony Samuel and Ken Peattie

Abstract

Fairtrade is recognised as a major contributor to ethical food and drink consumption, particularly following the successful “mainstreaming” of fairtrade products and the associated growth in sales volume. Mainstreaming however has created concerns about the potential over-commercialisation of the fairtrade movement and the associated risk of losing its ethical distinctiveness.

This paper concerns Fairtrade Towns, which have been proposed both as an element of mainstreaming, and as part of a new place-based developmental stage for Fairtrade. It draws on a Grounded Theory based study of Fairtrade Towns to explore them as a form of community-based social marketing that seeks to change consumption behaviours and to influence local social norms and institutions to support FT, whilst also aiming to preserve its perceived ethical validity. This perspective helps to better understand the marketing dynamics at work through a focus on the downstream and upstream components of efforts to extend Fairtrade consumption and supply within participating towns, and the breadth of the social relationships and interactions that are harnessed to achieve this.

Keywords: Fair Trade, Community Based Social Marketing, Validity, Grounded Theory.

Introduction

The growth in ethical consumption represents one of the most significant marketing trends of the late 20th and early 21st centuries. The 2017 UK Ethical Consumer Markets Report (EC, 2017) reveals UK ethical consumption to have passed £80 billion, with food and drink representing the largest element of ethical household spending (at £397 per household in 2016, more than double the 2006 figure). An important component of this growth is accounted for by Fairtrade (FT) certified products, of which there are now over 4,000 types available in the UK, generating sales of over £1.6 billion (EC, 2017). FT has evolved from an alternative marketing initiative appealing only to the most dedicated ethical consumers of forty years ago, to successfully reach mass market consumers and distribution channels (Doherty et al., 2013; Wilkinson, 2007). For the family staple of bananas, FT now accounts for 25% of UK sales, and retailers such as Marks and Spencer and the Cooperative have developed significant portfolios of own-label FT products such as tea, coffee and chocolate (Doherty et al., 2013). Even the firmly mass market Greggs bakery chain now uses only FT coffee across over 1,850 outlets. In addition, some major global brands now carry the FT label, including Starbucks (for espresso based drinks) and Nestlé (with Kit Kat and their controversial Nescafé Partners’ Blend coffee). The growing consumption and availability of FT products is intertwined with consumer awareness of FT. An international 2011 poll of 17,000 consumers found that over 80 percent recognized the FT mark in the UK, Ireland, Switzerland, Netherlands, Austria and Finland, with 9 out of 10 who recognised the mark expressing trust in it (Globescan, 2011).

FT’s successful “mainstreaming” reflects FT organisations improving their product quality in terms of appearance, taste, aroma, packaging and nutritional characteristics (Lecomte, 2003), extending product availability through retail channels (Doherty et al., 2013), and mastering well-established marketing techniques such as labelling and branding (Low and Davenport,
Another contributor to FT’s mainstreaming success has been the Fairtrade Towns (FTT) movement (Lamb 208). This began in Garstang (UK), where a small group of activists lobbied local councils, retailers and other organisations to stock and/or consume FT products (Alexander & Nicholls, 2006). In November 2001 the Fairtrade Foundation accepted their argument that it should be possible to accredit a place of consumption (rather than production) as FT, and Garstang became the World’s first FTT against the agreed criteria of:

- The local council must pass a resolution supporting FT, and serve FT coffee and tea at its meetings and in offices and canteens.
- A range of FT products must be readily available in the town’s (or city’s) shops and served in local cafés and catering establishments (with targets set in relation to population).
- FT products must be used by a number of local work places (estate agents, hairdressers etc) and community organisations (churches, schools etc).
- The council must attract popular support for the campaign.
- A local FT steering group must be convened to ensure continued commitment to FT status.

(Fairtrade Towns, 2017)

By 2016 there were 612 UK FTTs and the movement had internationalised, with 1116 more towns located across a further 25 countries including the USA, Japan and New Zealand (Fairtrade Towns, 2017). Despite their growth and prevalence, FTTs remain under-researched from a marketing perspective. Nicholls and Opal (2005) provided a pioneering framing of FTTs as distinctive and innovative marketing networks combining ethical and place-based marketing perspectives. Following this there have been relatively few studies devoted to FTT marketing, beyond Peattie and Samuel’s (2016) study of the role of FTT steering group members as ethical activists, and Samuel et al.’s (2017) paper exploring brand co-creation processes within FTTs.

The success of mainstreaming through the widespread adoption of conventional marketing practices has created two key problems for FT. Firstly there are concerns that commercial success will be perceived as compromising the ethical distinctiveness of FT products and producers, potentially weakening FT’s political and developmental message and its core ethical appeal (Golding, 2009; Low & Davenport, 2005 & 2006). Secondly, the success of the mainstreaming strategy has moved the agenda in FT marketing scholarship away from an emphasis on ethics and FT as an alternative arena of marketing and consumption, towards more conventional marketing issues and variables relating to branding, pricing, messaging, retail distribution, consumer loyalty and perceived product quality (Low & Davenport, 2005 & 2006; Moore et al., 2006).

This paper focuses on FTTs’ ability to address these two problems, firstly as vehicles for further mainstreaming of FT consumption (Lamb, 2008), whilst also working to prevent any erosion of trust in the FT brand; and secondly through FTTs’ status as highly unconventional marketing networks that invite the use of alternative research lenses to understand the marketing and consumption processes at play. It does this by adopting a previously suggested, but under-developed, perspective on FT marketing processes by likening them to those of social marketing (Golding & Peattie, 2005; Witkowski, 2005). It also refines this analogy in a place-based context for FTTs by drawing parallels with what McKenzie-Mohr and Smith (1999) conceptualise as community-based social marketing (CBSM) to solve wicked macromarketing problems (Kenndy, 2016).
Fair Trade: From Social Movement to Social Marketing?

Fundamental to FT is the notion of consumers buying certified products that benefit producer communities through a guaranteed (and generally higher) price than that paid through global commodity markets, complemented by marketing support and community investment. Nicholls and Opal (2005) and Nicholls (2004) argue that the developmental outcome of FT must be central to all FT offerings, whilst its marketing should aim to be commercially viable by clearly articulating the social, sustainable and economic connections between producers and consumers. Others, including Low and Davenport (2005 & 2006) and Lamb (2008), similarly argue that ethical virtue should be the starting point of FT consumption, and central to its promotion should be the altruistic proposition of benefiting distant others. However, this ethical positioning has at times been threatened by mainstreaming, for example through the shift of Café Direct (the UK’s largest FT coffee brand) away from a strongly ethical branding to instead stress product quality with the ethical component reduced to more of a product augmentation (Golding & Peattie, 2005). Moore et al. (2006) and Golding (2009) warn that if the social developmental qualities of FT becomes lost or obscured, it may lead to the FT message becoming merely a lifestyle choice enacted in the supermarket with no real social meaning or ethical substance resonating with consumers. This may make FT consumption more vulnerable to changes in lifestyle fashion, and Fridell (2009, p. 92) warns that the logical conclusion of mainstreaming:

“…may actually threaten to limit the long-term growth of the network by re-envisioning fair trade as a token project supported by giant TNCs on the sidelines of their larger marketing efforts.”

The notion of reframing FT as social marketing was first put forward by Golding and Peattie, and by Witkowski, both in 2005. Witkowski (2005) explains the potential to frame FT marketing as social marketing by returning to Kotler and Zaltman’s (1971: p.5) definition:

“Social marketing is the design, implementation and control of programs calculated to influence the acceptability of social ideas and involving considerations of product planning, pricing, communication distribution, and market research … It is the explicit use of marketing skills to help translate present social action efforts into more effectively designed and communicated programs that elicit desired audience response”.

Witkowski’s argument is that FT’s promotion of more socially equitable and sustainable development for producer communities, through the price premium and other benefits that FT offers, is clearly a social idea that is promoted through the application of marketing skills and processes. As Golding and Peattie (2005: p.163) put it:

“The suitability of social marketing as a discipline to inform and develop FT marketing is demonstrated by asking the question ‘What is the FT coffee consumer being asked to buy?’ The answer is not the coffee, since that is the means to an end. The consumer is being asked to buy into the idea of a fairer world”.

FT is essentially trying to shift marketing norms beyond a conventional focus on consumers’ self-gratification and instead factor into their purchase decisions the potential social and economic benefits to distant others (Barnett et al., 2011).

Golding and Peattie (2005) propose a continuum of marketing approaches, varying from entirely commercially orientated, to entirely socially orientated, but with the potential for hybrid positions, such as social enterprises that seek profit for investment in social causes. FT represents such a hybrid because, although the marketing processes and profit generating
activities resemble conventional commercial marketing, the primary aim, and the underlying purchase motive presented to consumers, is social. Although there is a widespread acceptance that FT is a form of social enterprise, by adopting primarily commercial means in the pursuit of primarily social ends (Peattie & Morley, 2008), equating it with social marketing represents an alternative approach that may yield original insights and suit its social mission. As Golding and Peattie (2005: p.159) argue:

“An alternative to relying on the principles and practices of conventional marketing to make FT products more commercial, is to look towards the discipline of social marketing as a means of preserving FT’s social mission while also contributing to its commercial success.”

A social marketing perspective can be valuable by refocusing marketers’ attention away from elements of the core mix, which is helpful since most FT producers don’t compete on the basis of the tangible product or price, and cannot compete in communications budgets against conventional brands (Golding & Peattie, 2005). It is also helpful due to social marketing’s emphasis on overcoming barriers to behaviour change, which may be relevant to the challenge of encouraging consumers to follow through on good intentions to purchase more ethical products (Chatzidakis et al., 2007). Finally a social marketing perspective can help to focus attention on the importance of a range of actors within the marketing environment in influencing consumers and retailers. One of the criticisms of existing studies of FT is that they mostly adopt a commodity chain perspective which focuses narrowly on a direct vertical chain of actors linking producers and consumers (Bek et al., 2017). Social marketing contexts often lack such an obvious supply chain, and as a consequence may adopt a more holistic perspective to understand influences on the behaviour of campaign targets. This has been reflected in the growing interest in supporting and complementing “downstream” behaviour change amongst targeted audiences (in this case consumers within FTTs), with efforts to change the “upstream” institutional and social environment (Andreasen, 2006; Goldberg, 1995). This may translate very closely into a FT context, particularly when promoted through FTTs within which a range of stakeholders normally considered to be part of the marketing environment, such as local government, schools and churches, can play an active role in the marketing system (Samuel et al., 2017). This is much more reminiscent of social marketing than conventional commercial marketing and its supply chain focus.

**Fairtrade Towns: From ethical place-based to community-based social marketing**

Combing the view of Golding and Peattie (2005) and Witkowski (2005) in considering FT as a form of social marketing with Nicholls and Opal’s (2005) characterisation of FTTs as place-based marketing networks logically leads to conceptualising FTTs as a form of CBSM. McKenzie-Mohr and Smith (1999) propose CBSM as something of an antidote to conventional social marketing campaigns which they see as often overly-dependent on media advertising and skewed towards creating public awareness rather than achieving actual behaviour change. They argue that particularly for pro-sustainability behaviours “Research on persuasion demonstrates that the major influence upon attitudes and behaviour is not the media, but rather our contact with other people” (p. 95). As Stern et al. (1984) identify, many campaigns to foster more sustainable behaviour (such as ethical purchasing) fail as a direct result of paying scant attention to the cultural practices and social interactions that influence human behaviour. CBSM instead draws upon social psychology to develop interventions that are effective because they focus on a community level where interpersonal relationships and a sense of place (Cresswell, 2004) are emphasised as catalysts for change (and in the case of FTTs this were clearly visible in Wheeler’s (2012), sociological exploration of one FTT). As McKenzie-Mohr and Smith (1999: p.16) explain:
“The techniques that are used by CBSM are carried out at a community level and frequently involve direct personal contact. Personal contact is emphasized because social science research indicates that we are most likely to change some behaviour in response to direct appeals or social support from others.”

Ethical consumers, like others, rely on an array of information sources about the goods or services they consume, with friends and colleagues’ recommendations previously shown to be the strongest influence on their decisions (Arnold, 2009; Walsh et al., 2004). This potentially indicates that information and influence from trusted individuals or groups (McKenzie-Mohr & Smith, 1999), originating from local places and social settings, for example, family homes, peer groups and work or community settings, may be vital for the credibility and effectiveness of attempts to market FT products (Tallontire et al., 2001).

The value of adopting a CBSM perspective to understand and promote sustainability-orientated changes to consumption behaviours at a local level is illustrated by Carrigan et al.’s (2011) consideration of a campaign to promote plastic bag use reduction in the town of Modbury. The value of the CBSM perspective included its emphasis on the relevance of grassroots engagement, its integration of upstream and downstream perspectives, and the provision of structured and practical guidelines for initiatives comprising:

“…four key steps: identifying barriers to change through community-based research; outlining a strategy that uses change tools (including the creation of commitment among members, implementation of behavioral prompts, development of new norms, communication of effective messages, creation of incentives, and making it convenient to act); piloting the strategy; and evaluating the outcomes.” (Carrigan et al. 2011, p.523).

Their study also highlighted the importance of community networks and coalitions and influential “catalytic individuals” in promoting changes to local norms and behaviours.

In our study of FTTs, the overarching aim was to understand the marketing processes at work within them. In this paper we follow the example of Carrigan et al. (2011) in presenting those insights that demonstrate the value of a CBSM perspective in understanding how community-based initiatives and relationships can promote pro-sustainability ethically inspired changes to consumption behaviours at a local level.

Methodology

This study applied the qualitative and interpretive methodology of Grounded Theory pioneered by Glaser and Strauss (1967), which is particularly suitable for phenomena like FTTs that lack pre-existing theory or rich data. It applied three core elements of qualitative enquiry to record FTT activists’ experiences and perceptions. Firstly ethnographic involvement over three years within one FTT Steering Group (with permission to record and research), with official minutes and researcher journals acting as data sources. Secondly, semi-structured interviews with twenty nine activists from eleven FTTs across England and Wales. Finally, an in-depth exploration of one FTT with three days spent with a founder of the FTT movement, learning more about the development of the movement and its application in their hometown. All data was subject to immediate line-by-line coding (by hand), followed by focused and then theoretical coding, from which three core categories emerged (a comprehensive account of the methodology, coding process and codes is available from Samuel and Peattie, 2015). The results presented here synthesise codes that emerged from the data that support a view of FTTs as an innovative form of CBSM.
Findings and discussion

FTT activist group strategies and activities were primarily focussed on increasing the volume of FT sales and consumption within their town, but this was balanced by a strong determination to protect the perceived validity of FT as providing commercially viable but ethically superior products linked to more sustainable development for producer communities.

The initiatives and relationships presented here seek to combine conventional downstream social marketing seeking to influence how and why individuals make FT consumption choices, with upstream social marketing focusing on the social environment factors (Andreasen, 2006) that determine how, where and why FT consumption choices are shaped within FTTs. In some cases it revealed marketing contexts, actors and influences that operated upstream and downstream simultaneously. The contexts in which FT promotion occurred included obvious ones such as the high street, within local councils (whose adoption of FT consumption is a requirement of accreditation) and within churches who represent longstanding institutional supporters of FT (Doran & Natale, 2011). It also revealed contexts, not necessarily associated with marketing and consumption, that also represent significant channels of influence, including local schools, community groups and events. The key elements of upstream and/or downstream social marketing observed within the study’s FTTs are discussed below. The full range of codes linking the seven different types of mechanism observed promoting FT (including consumption opportunities, purchase opportunities, educational initiatives, communications efforts, policy measures and governance mechanisms, the physical and mental resources of local activists and organisations, influences promoting behavioural norms, and particular times and occasions) to the various FT marketing contexts involved are presented in Table 1.

<table>
<thead>
<tr>
<th>Mechanism (How)</th>
<th>Down and Upstream Social Marketing</th>
<th>Down and Upstream Social Marketing</th>
<th>Upstream Social Marketing</th>
<th>Upstream Social Marketing</th>
<th>Upstream Social Marketing</th>
<th>Upstream Social Marketing</th>
<th>Down and Upstream Social Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context (Where)</td>
<td>Consumption opportunities</td>
<td>Purchase opportunities</td>
<td>Communicating</td>
<td>Policy/ Governance</td>
<td>Physical/Mental resources</td>
<td>Normalising behaviour</td>
<td>Time/occasion</td>
</tr>
<tr>
<td>Family and friendship</td>
<td>Giving of gifts; Serving of FT products in homes;</td>
<td>Ideologically based conversations and social learning;</td>
<td>Symbolic display of FT in homes; Consumer lead conversation s; Word of mouth;</td>
<td>Time taken to engage friends and family in FT discussions;</td>
<td>Giving of gifts on special occasions e.g: birthdays and Christmas; Use in the ‘Everyday’;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schools / Colleges and Universities</td>
<td>FT served in canteens/meetings; Use in staff rooms;</td>
<td>FT taught in lesson under sustainability and global citizenship; Connecting FT to younger audiences;</td>
<td>FT activities such as promotional events like fashion shows, stalls etc;</td>
<td>School FT policies governing FT consumption and promotion;</td>
<td>Teachers’ time and school resources such as classroom displays;</td>
<td>Via role as supplier and consistent promotion of FT; Student lead;</td>
<td>FT Fortnight events; School meal times and meetings;</td>
</tr>
<tr>
<td>Civic authority</td>
<td>FT served in local council meetings as per accreditation criteria;</td>
<td>Fairtrade sold in council canteens;</td>
<td>Linked to promotion of sustainabil ity policies and development aims;</td>
<td>Support for FT events; Inclusion in newsletters, guides, maps and web pages disseminated to local population;</td>
<td>FT policies governing consumption and promotion in council offices and other premises;</td>
<td>Support for FT’s through resource access including to staff; databases; premises; communication; finance; town locations.</td>
<td>Via role as supplier and consistent promotion of FT Citizen council lead;</td>
</tr>
<tr>
<td>Religious Institution s (For this study just Christian Churches)</td>
<td>FT served in meetings and worship groups; Provision of FT samples;</td>
<td>FT sold in church through stalls and Tradecraft reps;</td>
<td>Linked to teaching of the Gospel in sermons and teachings;</td>
<td>Symbolic through consumption by religious leaders; Word of mouth;</td>
<td>FT policies governing FT consumption and promotion in places of worship;</td>
<td>Church premises; Church staff time;</td>
<td>Via consistent promotion of FT; Congregat ion / Chaplin lead;</td>
</tr>
<tr>
<td>Civil Society Organisat ions (e.g. Christian Aid &amp; Amnesty Internatio nal)</td>
<td>FT products / stock (for promotion and sampling) at events;</td>
<td>FT products / stock sold at events;</td>
<td>Presentatio ns to groups and lobbying powers</td>
<td>“Piggy-back” opportunities for FT for example on leaflets etc; Placing FT logos and messages into urban landscape;</td>
<td>Influence to keep FT campaign focus on FT certified products;</td>
<td>Share experience and knowledge of campaigning; Access to databases of donors and volunteers; Staff &amp; volunteers’ engagement; FT products / stock (for promotions);</td>
<td>FT Fortnight; Various other campaigns such as ‘Make Poverty History’ or child labour awareness;</td>
</tr>
<tr>
<td>The High Street</td>
<td>Increased availability in high street catering establishment s;</td>
<td>Increased availability in terms of products, and places;</td>
<td>Via point of sale materials (e.g. Co-op stores);</td>
<td>POS displays &amp; literature; Increased in-store visibility;</td>
<td>More floor / shelf space given;</td>
<td>Increased visibility of FT produce in local shops and business premises;</td>
<td>During FT Fortnight promotion is increased (e.g. by Co-op);</td>
</tr>
<tr>
<td>Communi ty Groups</td>
<td>FT sampled at meetings &amp; events;</td>
<td>FT sold at some meetings &amp; events;</td>
<td>FT can be focus of educationa l events (e.g. talks or producer visits);</td>
<td>FT presentations ; Use of group media (newsletters, noticeboards) ;</td>
<td>Consumpt ion policies of group;</td>
<td>Connectio n of FT to local groups’ agendas;</td>
<td></td>
</tr>
<tr>
<td>Communi ty Events</td>
<td>Sampling of FT products;</td>
<td>Event sales, sometimes for sampling purposes (to then refer interested consumers to retail outlets);</td>
<td>Meeting FT producers and others; Opportunit ies to discuss and be presented with the developme ntal message of FT;</td>
<td>FT presence in most Town events (even if unrelated);</td>
<td>FT producers’ time, visits and stories; Civic / Civil Society supported via reduced insurance rates, physical help, stalls etc;</td>
<td>FT Fortnight; Inclusion in Farmers’ markets; Specific events (e.g. town festivals);</td>
<td></td>
</tr>
</tbody>
</table>

Table 1: Upstream and Downstream Social Marketing: The How and Where of Volume and Validity in Fairtrade Town
**Downstream social marketing mechanism: communication**

To complement more conventional FT marketing communications such as in-store displays, or FT Foundation online promotions for FT Fortnight, a range of place-based media were employed by activists to influence the local population. This included FTT supporters actively using personal connections within the social units they belonged to (families, friendship groups, workplaces or organisations) to create opportunities to discuss and promote FT within their town. More formally it included working with local authorities to integrate FT information into local newsletters, guides, directories and websites. It also included symbolic consumption acts, such as the display of FT products in the home by activists, or religious leaders conspicuously consuming FT in places of worship. Even the local physical environment was enlisted as a promotional medium through displays of signage and banners, and promotional floral displays in some towns.

**Upstream social marketing mechanisms**

A range of activist-led initiatives sought to expand the demand for, and supply of, FT products locally through changes to the local institutional, cultural and physical environment:

**Education:** The intertwining of education in schools and consumption practices within FTTs is a theme thoroughly examined by Pykett et al. (2010), and it was visible within the study towns with frequently strong connections between FT steering groups, local representatives of related civil society organisations (such as Christian Aid, or Amnesty International) and local schools and universities. Although some educational efforts in the classroom or church might be considered as downstream communication aimed at directly inspiring pro-FT consumer choices, the aim was more commonly to build community understanding of, and support for FT, and promote it as an element of local place identity and as a local social norm. Educational efforts could include improving household understanding of FT through schoolchildren’s projects, and also the inclusion of FT producers at local events where they could enlighten locals about the developmental benefits of FT consumption through direct contact or reporting via local media.

**Policy and governance:** A supportive environment for FT consumption choices was created in the study towns through policy and governance initiatives enacted through schools, local authorities, churches, retailers and other organisations. The adoption of FT as a default option in schools, cafes or council premises, effectively edits purchase and consumption choices for workforces, visitors, customers or students, and shifts the conscious support for FT from the consumer to those organisations (Barnett et al., 2011; Malpass et al., 2007). Such upstream initiatives have the potential to expand FT consumption, but the removal of active consumer choice risks disconnecting local consumers from the developmental message at the heart of FT (Golding, 2009, Low & Davenport, 2005).

**Physical and knowledge-based resources:** FTT success was significantly dependent on the investment of time and social capital by local activists (Peattie & Samuel, 2016). Beyond this, a range of resources were supplied by local FTT market actors to help shape the local consumption system in favour of FT. Local councils, schools and civil society organisations provided access to a variety of resources to assist with marketing efforts (such as premises, newsletters, noticeboards and databases) whilst other campaigning organisations shared their experience and knowledge.

**Normalising behaviour:** One outcome of FTT activists’ efforts to expand the consumption and supply of FT products within their towns is that it normalises FT consumption as residents see FT products and messages consistently across local shops, cafes, workplaces, schools, churches and libraries.
Hybrid down and upstream social marketing mechanisms

Some activist-led initiatives sought to both encourage greater consumption amongst the local population and to influence the local social environment to support FT.

Providing purchase opportunities: A central marketing function of a FTT is to develop distribution outlets and sales opportunities for FT products, and in the wake of mainstreaming this has often involved extending FT availability beyond the traditional high street (Low & Davenport, 2007). This study found activists negotiating to make FT products available in places not normally associated with retail commerce including schools, libraries and even churches. It additionally found that FT products are increasingly available to purchase in public buildings, workplaces, farmers markets and at local events.

Providing consumption opportunities: Although often closely related to purchase, separate opportunities to consume FT products as a promotional strategy were constructed by FTT activists. This encompassed serving FT products to others within their own homes, ensuring they are supplied at meetings within local organisations or groups, churches using FT communion wine, or sampling opportunities being provided at events. Churches for example were often more comfortable introducing consumers to FT products through sampling and then encouraging them to purchase elsewhere, than having a more overtly commercial role in sales.

Specific times and occasions: A number of findings emerge from this study showing that place and time are intrinsically linked to some of the marketing dynamics operational in a FTT. On an annual basis, FT Fortnight was frequently mentioned as a focus for organising events or trying to extend the local reach and profile of FT. On a more day-to-day basis, lunch times and meetings in many businesses, schools or universities create the opportunity to sell or consume FT products and special occasions such as birthdays and Christmas provide marketing opportunities within private places for FT gift giving and consumption. Days of worship such as Harvest Festivals or Easter also present times when faith-based organisations disseminate tailored FT messages.

Preserving FT’s validity

A further perspective on FTTs that this research revealed, is their role as something of an antidote to mainstreaming and the potential loss or dilution of the ethical core of FT marketing and consumption due to adoption of FT by highly conventional companies, the reduced differentiation of some FT suppliers, and the increasing application of choice editing strategies. This was evident in the emphasis FTT activists place on the ethical core of FT when trying to encourage retailers and business to provide FT products, or members of their social networks to consume them, and when seeking to connect FT consumption to the values and practices of organisations throughout their local communities. FTTs combination of behavioural influence, upstream and downstream focus, community embeddedness, and emphasis on preserving the ethical validity of FT is encapsulated in a quote from a Keswick FTT Group member:

“(Our role)... is to promote the buying and the selling of Fairtrade products which means working within our community, working within our community groups as well as working with retailers and wholesalers, so working with the supply side and working on the demand side to promote it. To raise awareness of it and what it does, and therefore to educate the community as a whole, and to make sure also that the profile is maintained so that all of that stays within the context of trade justice.......so that is what our role is, it’s kind of nudging and shoving and talking and singing, if I can put it that way, and also getting others to do the same as well.”

This emphasis on ethical validity and community may be important to ensure the continued development of FT consumption at a time when mainstreaming seems to be losing some
momentum, evidenced by the move away from the use of full FT accreditation by the likes of Sainsburys, Waitrose and Cadbury, and the rise of competing ethical labels, particularly Rainforest Alliance (EC, 2017).

What FTT marketing reveals, is a quest to expand the volume of FT sales, whilst protecting the validity of FT’s identity as an ethical and sustainability orientated marketing initiative. As Figure 1 summarises, the early solidarity selling era of FT was limited in its volume and in its validity (from a commercial rather than ethical perspective) by the narrowness of the channels it sought to supply through, and by the compromises inherent in the core marketing mix (Golding & Peattie, 2005). The initial growth in FT by its extension through the alternative high street (Low & Davenport, 2007) and the emergence of niche brands, such as Café Direct or Divine Chocolate, brought greater commercial validity without initially attaining mass market impact. A greater volume in FT sales was achieved through the adoption by mainstream brands and retailers, and the use of choice editing to make FT the default option in certain consumption contexts, although this may endanger more than enhance FT’s validity due to the threat to the core ethical message (Golding, 2009). What FTTs offer is a third developmental path that integrates FT consumption into a local community, its organisations, identity and social interactions in a way that can both increase sales volume whilst enhancing commercial and ethical validity. Understood as a CBSM initiative that combines direct downstream appeals to potential consumers with upstream changes to the local institutional and marketing environment that favour FT consumption, FTTs’ effectiveness comes from the breadth of social connections and local social capital that are employed to promote local FTT consumption.

Figure 1. Post-Mainstreaming FT Development Trajectories

<table>
<thead>
<tr>
<th>Volume</th>
<th>Validity</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>Path 1</td>
<td>Fairtrade label adoption by mainstream brands</td>
</tr>
<tr>
<td>Path 2</td>
<td>Post Mainstream Trajectory</td>
</tr>
<tr>
<td>Path 3</td>
<td>Upstream and downstream social marketing activity via FTT community / place adoption</td>
</tr>
</tbody>
</table>

The benefits of a CBSM perspective on FTTs

An upstream/downstream CBSM perspective is helpful in understanding FTTs’ marketing dynamics for several reasons. Firstly it helps to focus attention beyond the usual narrow limits of a commodity chain perspective (Bek at al., 2017) to encompass local organisations and potential contexts for consumption and influence that go beyond those usually considered in commercial marketing. As emphasised by a Bridgnorth FTT Group member:

![Image of Figure 1]
“I do think (our role) is to keep the issues alive in our local community, to promote
the issues to as many different groups as we can... We think our role is to keep
promoting it through different groups locally and to keep putting on events and
just to keep the presence locally and to put pressure on any new organisations that
come into the town.”

Secondly, it stresses the importance of interpersonal relationships and a sense of place which
FTT activists, operating as local catalysts, rely upon in promoting FT consumption and
support. As a member of the Worcester FTT Group expressed it: “We’re always nudging and
pushing. Trying to encourage. It’s encouraging through people you know.” Thirdly it
recognises that FTT groups’ efforts in promoting FT are about tackling a behavioural change
challenge in respect to local consumers, and the retailers and upstream organisations that can
influence them. As a Cardiff FTT Group member noted:

“…you can push people who might not know about Fairtrade: ‘So you know we
are now a Fairtrade city, this is what we’ve agreed to, so could you have a think
about introducing more Fairtrade products?’ – and we do that in shops. Wherever
I go, anywhere, every restaurant I go to, I ask: ‘Have you got Fairtrade coffee?’
and even if they don’t, it raises the question why haven’t you got it.”

Considering promoting FT as a behavioural change challenge may be helpful because the
activists driving FTTs tend to be “believers” in FT who may not easily appreciate the reasons
why people may choose not to consume FT or why organisations may not already provide FT
products. Finally CBSM provides a structured framework for planning initiatives which
encompasses the consideration of the upstream and downstream influences on peoples’
behaviour, and focuses on behaviour change barriers and how to overcome them (Carrigan et
al., 2011). This is potentially helpful, because once groups moved beyond the focus of
achieving initial FTT accreditation, the efforts of their volunteer activists, although an
important catalyst for local change, were not always that strategic, structured or systematic.

“….actually trying to keep the enthusiasm going is always a bit of a pain. Once
you’ve achieved the mark, it’s always easy to let it slip... Once you’ve got the
status, it’s relatively easy to take your foot off the accelerator and think, oh well
we’re alright now and toddle on for the next so and so.” (Hereford FTT Group
member)

Groups would use the full range of behaviour change tools associated with CBSM (creation of
commitment among members, behavioural prompts, establishing new norms, communication,
incentives, and making action convenient), but in using them relied on their existing social
networks and social capital, and the particular opportunities that confronted individuals.
Embracing a CBSM perspective more formally, including its emphasis on identifying and
overcoming change barriers, may help to make FTT groups’ more strategic and effective in
their approach.

Conclusions.

FTTs have been identified as a contributor to FT’s mainstreaming (Lamb, 2008), and also as a
further stage in the development of FT that goes beyond conventional mainstreaming by
broadening FTs appeal through localisation strategies and strengthening the networking and
information flows amongst FT stakeholders (Alexander & Nicholls, 2006). Understanding this
process from an upstream/downstream social marketing perspective is helpful because it help
to can connect the micro, meso and macro marketing dynamics at play (Goldberg, 1995). At a
macro level, FTTs are effective at connecting citizens’ and local organisations’ purchasing and
consumption habits to their ability to act at a distance and benefit distant others reflecting global
ethical concerns (Alexander & Nicholls, 2006; Wheeler, 2012). At a meso level FTTs succeed through upstream social marketing efforts to change local social norms and collective infrastructures of consumption and influence local social institutions (Barnett et al., 2011). At the micro level, FTTs seek to encourage behavioural change amongst residents, and although that behaviour mostly involves purchasing and consumption of ethical food and drink products, it resembles CBSM rather than commercial marketing for two reasons. Firstly, due to the emphasis on local social interactions and learning, rather than on conventional commercial marketing communication. Secondly, due to the emphasis on engaging people from a perspective of their multiple identities, not just as abstract consumers, but as members of social groups, communities, congregations or local organisations. As Lamb (2008: p.42) frames it, FTTs succeed through “ordinary people” encouraging other people and organisations to become globally responsible (Barnett et al., 2011) through the act of FT consumption.

References


An integrative justice approach towards fair and ethical intermediaries in base of the pyramid markets

Dr. Nicholas J.C. Santos, Marquette University, U.S.A.

In a noteworthy paper accepted for publication in the Journal of Macromarketing, Beninger and Shapiro (2018) point out that despite the significance of intermediaries in marketing systems, there has been relatively little empirical research done about the role of local intermediaries in impoverished contexts. In a systematic historical literature review spanning about seven decades from the second world war onwards, Beninger and Shapiro find that although the dominant view of intermediaries is that of being exploitative and unskilled, this is not the sole perspective. Instead, intermediaries have also been considered as important, particularly in impoverished contexts. As a result, Beninger and Shapiro (2018) conclude that the literature is largely conflicted about whether intermediaries should be removed or whether they should be supported, and that further research is needed to determine the role of intermediaries in impoverished contexts. This paper does not provide empirical research to determine whether or not intermediaries are needed in impoverished contexts. Instead, it takes the position that given that intermediaries are understood as facilitating exchange between sellers and buyers, the critical question is not whether intermediaries are needed or not but rather how ought they to function in a manner that can be deemed to be fair and just for both parties that they are mediating between but especially for the impoverished one. Therefore, this paper develops normative guidelines for local intermediaries operating in the base of the pyramid market. Following the recommendation of Beninger and Shapiro (2018), it uses the integrative justice model (IJM) for impoverished populations (Santos and Laczniak 2009) as the theoretical lens. We begin with a brief elaboration of the integrative justice model and then explain what we mean by intermediaries. We follow this with developing normative guidelines for intermediaries that are connected with the broader ethical propositions of the IJM.

The IJM is a normative model for fair, ethical, and just marketing in impoverished contexts (Santos and Laczniak 2009). It is constructed using a normative theory building process from the discipline of philosophy (Bishop 2000) and is comprised of ethical elements that ought to be present when engaging impoverished populations (Santos and Laczniak 2009). Based on an examination of about thirteen different perspectives in moral philosophy, corporate social responsibility and religious doctrine, there are five key elements that emerged. These five key elements are: (1) authentic engagement without exploitative intent; (2) co-creation of value; (3) investment in future consumption; (4) interest representation of all stakeholders; and (5) long term profit management. The normative theory building process and the theoretical support for each of these key elements has been outlined elsewhere (Santos and Laczniak 2009, 2012).

The word “intermediary” comes from the Latin “intermedium” which means “one who acts between others” (www.etymonline.com). An intermediary could be defined as “an economic agent that purchases from suppliers for resale to buyers or that helps buyers and sellers meet and transact” (Spulber 1999, p. 135 cited in Kistruck et al. 2013, p. 32). But this definition of intermediaries is rather broad and could extend from conglomerates like the giant retailer, Walmart and the global platform, eBay to an individual mom and pop store in a rural village. Beninger and Shapiro (2018) limit intermediaries to “local intermediaries in impoverished contexts.” They list examples of these local intermediaries as: general stores (Shapiro 1965); “peddlers, registered agents, dealers, produce traders, merchants, retailers, wholesalers, millers, ginners, graders and packers, stallholders, bazaar traders and hagglers” (Hibbert 1972, p. 157). Viswanathan, Rosa and Ruth (2010) discuss the role of subsistence-consumer-merchants (SCMs) in subsistence marketplaces. These SCMs are microenterprise operators.
who act as a bridge between subsistence consumers with various needs and companies who have products or services to satisfy those needs. As Viswanathan et al. (2010) show, these SCMs operate in a web of interdependent and sustaining relationships between vendors, customers, and family members. Base of the pyramid (BoP) markets can be complex. Individuals in these markets could be simultaneously consumer and producer or distributor and consumer. For the purpose of this paper, we define local intermediaries in BoP markets to be either individual persons or organizations/entities that are locally situated and that are part of the local BoP marketing system that add value upstream (to producers) or downstream (to consumers) in the marketing channel. Based on this definition, we develop normative guidelines based on the five key elements of the IJM for fair and ethical local intermediaries in base of the pyramid markets.

References:


Consumer Behavior in Japan as Declaration of Acceptance and Rejection through changes in Group Definition as related to Social Conditions (from Gay to LGBT)

Hajime Sasaki, Hitotsubashi University, Tokyo, Japan

This research focuses on consumer behavior in the LGBT community as a new solidarity of different communities: lesbian, gay, bisexual, and transgender, further indicating how the alignment of communities creates a new self-consciousness and purchasing behavior in Japan where has been little study done even though attitudes in social movement are completely different from Europe and America. A social survey of 128 sexual minorities attending the Rainbow Festival was taken and analyzed. The survey found that consumers reacted differently toward corporate activities depended on the assumption of LGBT solidarity, based on sexuality and experience of mental pressure. Considering this result, this research examines the mechanism of acceptance and resistance through consumption induced by transformation of group connection. It provides new suggestions on how the market contributes to social movement in Asian countries where esteemed social norms matter more than individual rights.

The social movement theory originated as anti-consumption behavior to bring about changes in philosophy and culture (Kozinets and Handelman, 2004). Eventually, the theory was established as a new research field that brought institutional change and innovation for defects of market (King and Pearce, 2010), and also studied how politics in consumption and consumer lifestyles emerge (Wahlen and Laamanen, 2015). Theory often focuses on the movements of stigmatized communities (Peñaloza, 2017; Descubes, McNamara, and Bryson, 2018). However, there are no research focusing on Japanese consumers who are characteristically negative about protesting through social movement. This research finding will be trigger solving how macro-culture and ideological gap influence consumption concerning social movement.

With the diffusion of the LGBT concept in Japan, this research first verifies the effectiveness of consumption as LGBT community (H1). Second, it attempts to clarify how differences in purchasing attitudes as “LGBT consciousness” emerge by consumers’ background (H2).

In this survey, we set four questions as explanatory variables and seven questions as explained variables. Explanatory variables are sexuality (X1), acceptance status of identity (X2) [coming out status (X2-1) / ratio of similar sexuality friends (X2-2)] (Cass 1979), bygone experience of mental pressure (X3), and educational status (X4). Explained variables are image and availability of company service when a company implements different methods for the LGBT community as follows (Y1-Y7). (See Exhibit 1)
The first verification part statistically verified whether answers after watching explained variables are significantly different from answers before to prove H1. Subsequently, this research conducted a three-factor analysis to simplify explained variables, and classified respondents into eight groups depending on whether the answers for the three factors were relatively positive or negative. (See Exhibit 2&3) The second verification part then statistically verified for these eight groups whether answers of explanatory variables in the target group were significantly different from answers of other respondents to prove H2.

<table>
<thead>
<tr>
<th>Factor 1</th>
<th>Factor 2</th>
<th>Factor 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y6</td>
<td>0.905</td>
<td>Y1</td>
</tr>
<tr>
<td>Y2</td>
<td>0.838</td>
<td>Y7</td>
</tr>
<tr>
<td>Y7</td>
<td>0.823</td>
<td>Y5</td>
</tr>
<tr>
<td>Y5</td>
<td>0.595</td>
<td>Y1</td>
</tr>
<tr>
<td>Y4</td>
<td>0.251</td>
<td>Y2</td>
</tr>
<tr>
<td>Y1</td>
<td>0.111</td>
<td>Y6</td>
</tr>
<tr>
<td>Y3</td>
<td>0.057</td>
<td>Y7</td>
</tr>
</tbody>
</table>

*Exhibit 2: Three factors*

As a result of the first verification, all actions improved corporate image, and this result confirmed H1. In addition, actions encompassed in Factor 1 of factor analysis improved availability of company service as well.

<table>
<thead>
<tr>
<th>Factor</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>+</th>
<th>-</th>
</tr>
</thead>
<tbody>
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<td>F1</td>
<td>+</td>
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<td>+</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>54</td>
<td>74</td>
</tr>
<tr>
<td>F2</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>+</td>
<td>+</td>
<td>-</td>
<td>-</td>
<td>49</td>
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<td>-</td>
<td>+</td>
<td>-</td>
<td>+</td>
<td>-</td>
<td>48</td>
<td>80</td>
</tr>
</tbody>
</table>

*Exhibit 3: classified 8 groups by 3 factors*

According to factor analysis of answers on images, explained variables were classified as Factor 1 (Y2, Y6, Y7) “concrete actions and commitments”, Factor 2 (F3, Y4) “image and motif” and Factor 3 (Y1) ”rainbow”. The fact that Y1 and Y2, which had the same meaning actions, are distinguished to a different factor is remarkable. And this analysis shows that there are 3 points of significant differences about explanatory variables between 8 groups. First, non-gay sexuality had a tendency to have a positive attitude toward overall actions of the company. Second, gay consumers showed a negative attitude for visualized action (F2 and F3), although they attended the “Rainbow” Festival. Finally, people who had not felt bygone mental pressure were negative for corporate efforts. Thus, this research proves H2 that consumers’ backgrounds influence purchasing attitudes as “LGBT”.

Although group integration and transformation of group connection is generally explained as conforming behavior (Asch, 1951), this research reveals acceptance and rejection through consumption, like the group conflict theory (Sherif, 1966) toward the group transformation
cause by social movement. The result shows that gay people in Japan, who have stronger social power than other minorities depending on male-dominated society, are reluctant to the new concept “LGBT”.

There have been underlying differences in the basic approach to social and family relationship between Asians and other countries. Considering all pressures due to social norms, especially importance of agnate blood relations, Japanese gays have historically chosen “liberation to closet gay” (Maekawa, 2017) to feel comfortable. In addition, they did not experience devastating tragedy in community like violent attacks and spread of HIV. These macro-situations possibly create different approach by stigmatized community who have felt moderately comfortable. Similarly, people not experiencing mental pressure are not inclined to unite. The findings reveal consumers declare acceptance and rejection through consumption, depending on whether consumers think cooperation is necessary or not by own experience, toward consciousness as new solidarity “LGBT”.

Furthermore, gays who have not had a big task to unite show negative reactions, especially to imaged action with motifs, including rainbows. This result shows gay consumers, who have felt moderately comfortable, reconcile to purchase two different viewpoints prudently between their experiential consciousness and the value that company offers.

Even as the imported LGBT concept and rainbow motif are spreading rapidly in Japan, opinions are divided among minorities on market effectiveness through company action. In recent years, support for the word “diversity” has been increasing in Japan. However, the precedence of assertion makes minorities, especially gays, skeptical. In fact, this market situation has caused dissociation of consciousness instead of contribution to social movement as shown in this research. It is possible that Japanese minority are not accustomed to the western style of social movement and company actions. The concrete corporate actions and services to solve problems that are significantly occurring due to sexual minorities are effective and suitable for all sexual minorities who have different experience, rather than merely and vaguely showing a supportive attitude to connect the social movement and the market like a rainbow motif, for the true sense of SOLIDARITY.

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Transformation Agenda and Sustainability Innovation for societal transformation through sustainable business practices

Dr Samuel Petros Sebhatu, Karlstad Business School / CTF- Service Research Centre, Karlstad University, Karlstad, Sweden

Professor Bo Enquist, Karlstad Business School / CTF- Service Research Centre, Karlstad University, Karlstad, Sweden

Extended Abstract

This paper is a conceptual and empirical study of the role of Agenda 2030 for transformative change through sustainability and sustainable business societal practices to create a new meaning and make a real transformation. The objective is to create an understanding of how societal business practices can contribute to a broader view of business transformation, in a globalized world, from a strict firm-centric perspective to a new business societal practice by using specific contextual settings.

In this paper, a real global transformation agenda in practice is part of the Agenda 2030 for Sustainable Developmental Goals (SDGs), which is a plan of action for people, planet, prosperity, and partnership. Sustainability and Agenda 2030 are complex and dynamic (Waddock et al., 2015; Tulder, 2018). Therefore, the transformative change should be part of a new paradigm of a positive change in the complex environment (Tulder, 2018). The transformation from a socio-economic perspective can be found in the field of transition management for sustainable development, which focuses on the complexity of governance issues and societal challenges (Loorbach, 2010; Grin et al., 2011; Loorbach, 2014; Bragdon, 2016). Even though complexity is not the focus of this study, businesses need to be efficaciously adaptive the inherent complexity of a system match the external complexity it confronts (McKelvey and Boisot, 2009) to have a smooth transition.

The transformative change, in this study, is embedded in societal transformation, value creation, and sustainability. Rockström and Klum (2015) highlight that a transition to sustainability can attain by combining technology with deep system innovations and lifestyle changes (ibid. p. 133). Sustainable business practices illustrated as dynamic processes in which social and environmental challenges are used innovatively and proactively to address firm-centric needs as societal challenges. This has to be problematized and understood in real context (Edvardsson and Enquist, 2009; Lusch and Vargo, 2014), and in a broader and transcendent way (Enquist et al, 2015) in a macro-social marketing (Kennedy, 2017; 2016) perspective, which is not firm-centric but rather a societal aspect (Laczniak and Murphy, 2012). This study also contributes to discussions on service research, based on the macro-marketing approach to understanding the complex today’s business and societal landscape. Vargo and Lusch (2017) discuss the need for macro marketing in the future of service research by presenting a framework that can inform macro-marketing theory and research. It is based on the opportunities around ethics, environmental sustainability, social sustainability, and public policy.

The methodological approach is inspired by Gummesson (2017), who provides a broader view of using cases by addressing interactive research to generate case theory in business and management with the deep insight that interactive research requires a win/win reflection and dialogue. The approach aims to create a new meaning in the dialectic between the theoretical framework and the real context. Sustainable business practices in real settings are described by two enterprises: IKEA, the world leading furniture enterprise; and Löfbergs, a family-owned coffee roaster in Northern Europe. Both organizations are values-driven family businesses and
global actors working proactively in implementing the SDGs. IKEA has been working since 2015 with “People & Planet Positive IKEA Group Sustainability Strategy for 2020” (IKEA P&P, 2015) and beyond with ambitions for Agenda 2030 (IKEA P&P, 2018). IKEA is stating that “We can no longer use 20th century approaches to meet the 21st century – we need transformational change – which means challenging old ways and embracing the new, being bold, innovative and committed to taking action” (IKEA P&P, 2015, p. 4). Löfbergs is one of the largest importers of Organic and Fair-Trade certified coffee in the world. The company operates in more than ten markets and is one of eight founding members of the global initiative for coffee & climate (Löfbergs, 2016; Löfbergs SR, 2015/16).

Transformation requires interactive research through dialogue in order to understand the transformative change process. To do so, we adopted a noble approach of a Transformation lab (T-lab), as a data collection method, based on discussions between business, researchers and different stakeholders. We have used a qualitative, longitudinal study to investigate the transformative change to meet sustainability challenges. Our cases have developed over a long period. We have followed and collected data systematically between 2007 and 2017 (different time frames for the two cases) in combination with informative field data (Alvesson and Sköldberg, 2010), such as interviews, interview transcripts, observations, Transformation lab (T-lab) discussions and documents (e.g., steering documents, field narratives of positive and negative incidents, key performance figures and annual reports). Our data access was unique (Gummesson, 2017), in that we were independent of any industry funding, but cooperated with both companies. The sampling of these two companies was discriminative: We sampled companies with strong sustainability reporting until recurring patterns emerged (Strauss and Corbin, 1990). Following Bowen’s (2008) argument, that it is insufficient to state simply that sampling is not concluded until we reached saturation. We adopted specific guidelines. The latest primary data were collected in three stages, through interviews with leaders and management of these companies, observations and dialogue (as a focus group).

This paper is contributing to expanding the scope of service research in macro marketing for more interactive research and societal perspective in a global context in which ethical, social and environmental challenges can be approached by innovation and sustainability for transformation and prosperity growth within the planetary boundaries.

**Keyword(s):** Transformation; Sustainability; Innovation; Value creation; Social marketing; Sustainable business practices; Agenda 2030

**Article Type:** conceptual research paper

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The boom generation is aging. America’s population is getting significantly older: in 1970, only 9.8% of US residents were aged 65 and over; the figure was 13% in 2010 and is projected to be more than 20% by 2030 (Colby and Ortman 2014). The “silver tsunami” will present unique challenges to America’s health care system and large-scale societal programs such as Social Security and Medicare (Barry and Blow 2016).

Aging boomers’ health and quality of life have been a concern not merely because of their cohort size. Research indicated that baby boomers have higher rates of obesity, hypertension and chronic diseases, poorer mental health status, more disability, lower self-rated health than members of the previous generation at the same age (e.g., King et al. 2013; Moyle, Parker, and Bramble 2014; West et al. 2014), and are more downbeat about their overall quality of life than are adults who are younger or older (Pew Research 2008). Public policy makers and health care organizations have advocated for and implemented preventive health marketing in the hope of delivering better health and higher quality of life to aging Americans (Anderson et al. 2012; Bandura 2005; Rahtz and Szykman 2008).

While Rahtz and Szykman’s (2008) model focuses on educating aging boomers with preventive health knowledge to facilitate lifestyle change, unhealthy lifestyles entrenched in the culture of the Woodstock generation may be more resistant to change. Drawing on the metaphor of cultural capital, we theorize that Counterculture lifestyles in different fields are intricately intertwined symbolic elements organized by an anti-establishment habitus and, as such, should be naturally correlated and capable of predicting one another. Therefore, an anti-establishment lifestyle in the spiritual field (e.g., withdrawal from institutional religion) should be capable of predicting another anti-establishment lifestyle in the health-related consumption field (e.g., alcohol misuse) even when such a relationship might be weak or even non-existent otherwise. The anti-establishment cultural meanings were not only valid in the 1960s and 1970s but also stay alive in the generation’s collective memory decades later, especially for those who celebrate Woodstock as central to their identity (ABC News 2009). Our Core Hypothesis: For aging baby boomers, withdrawal from institutional religion 1) is positively associated with current excessive drinking; and 2) is positively associated with current smoking. Rahtz and Szykman’s (2008) model needs to be modified on how to market preventive health to America’s aging population increasingly dominated by the baby boom cohort. Our Cultural Capital Model proposed that withdrawal from institutional religion should be negatively associated with adoption of healthy lifestyles and, because of this linkage, should have negative indirect effects on perceived health and quality of life.

The Core Hypothesis and the Cultural Capital Model were tested with data extracted from the Health and Retirement Study (HRS) project. Test results consistently supported the Core Hypothesis: withdrawal from institutional religion as a defiant lifestyle in the spiritual field four or five decades ago is associated with alcohol excess and cigarette smoking among aging boomers in 2016. Data analysis results also confirmed that withdrawal from institutional religion was negatively associated with adoption of healthy lifestyles and, indirectly, affected perceived health and quality of life.

This research contributes primarily to the macromarketing literature on quality of life by modifying a previous model, which proposes that preventive health information being provided will be processed, considered, and acted on to positively affect baby boomers’ health and
quality of life (Rahtz and Szykman 2008). Instead, we propose that baby boomers, due to Countercultural influence, may accept preventive health information as facts but not act in the manner predicted by previous models in their health decisions. Unhealthy lifestyles may be more difficult to change if they are entrenched in the Countercultural habitus as elements of its intertwined symbolic meaning system. The formation and growth of a marketing system reflect the “social, cultural, political, and economic life of communities…and the historical context or legacies that each community has inherited.” (Layton 2015) Without recognizing or factoring in Countercultural influence, a marketing system designed to promote preventive health to the baby boom cohort may turn out to be ineffective in advancing healthy lifestyles to deliver better health and higher quality of life. Similarly, without reviewing Countercultural influence on American attitudes and behaviors toward drugs like marijuana among the boom and later generations (e.g., Bach 2013; Pew Research 2018), conceptualization would be incomplete of the rapidly growing marketing system of legal marijuana, medical and recreational.

Quality of life is a key macromarketing concern. The linkages from religion and spirituality to quality of life have received considerable research attention (e.g., Peterson and Webb 2006; Sandıkcı et al. 2016). In this research, religion and spirituality are presented in the dynamic anti-establishment movements of the Counterculture and linked to defiant health-related lifestyles through the cultural capital theorization. By doing so, this research offers a new perspective to quality of life as baby boomers move into their latter stages of life, and to the impact of Counterculture on the overall well-being of our local, regional, or global society.

This research also contributes to the macromarketing literature reflecting on Countercultural impact (Arnold and Fisher 1996; Stinerock 2016) by reviewing Countercultural lifestyles in different fields, theorizing anti-establishment lifestyles as interconnected cultural capital, and conducting empirical tests. This research is also related to the macromarketing literature on religion and spirituality (e.g., Kale 2004; Leary et al. 2016; Mittelstaedt 2002) by reflecting on how the Counterculture responded differently to institutional religion and personal spirituality in its symbolic rebellion.

This research has implications for public policy making. For lifestyle change to be effective, unhealthy lifestyles should be understood as a cultural capital with symbolic meanings to which we need to be more sensitive. Public policy options could range from encouraging more research on Countercultural lifestyles among the boom generation to finding more targeted solutions in the design of benefits in health insurance programs such as Medicare to encourage health-promoting behaviors.

**Keywords:** preventive health, quality of life, baby boomer, aging, healthy lifestyle, Counterculture, cultural capital

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Reflections on Cambodia’s Development, 25 Years Post-UNTAC: Now What?

Clifford J. Shultz, Loyola University Chicago, USA
Don R. Rahtz, College of William & Mary, USA
Kerry Slattery, National University of Management, Cambodia

Abstract

The year 2018 marked the 25th Anniversary of the United Nations Transitional Authority in Cambodia (UNTAC), which from 1992-1993 brokered a peace accord to end years of civil war (United Nations 2003). A more peaceful, inclusive and prosperous society emerged from genocide and subsequent years of profound economic mismanagement (Chandlers 2009; Shultz 1995). Millions of Cambodians have been pulled from the depths of poverty, and the country has become a favored destination for investors and millions of tourists (World Bank 2018). Cambodia however continues to endure rough-and-tumble politics, human rights violations and other challenges that could derail years of progress (CIA 2018). For example, GNI per capita has increased five-fold, poverty has declined and people are living longer, but assaults on the environment, cultural artifacts, and members of opposition parties and political dissent more generally are troubling. These assaults jeopardize Cambodia’s future well-being, the quality-of-life for its citizens and the outcomes for other countries in the region. The rate and scope of environmental degradation is especially concerning (e.g., Khouth 2018), as are indices for corruption (Transparency International 2018) and human development (UNDP 2018).

The purpose of this presentation is to share reflections on the socioeconomic development and evolving challenges/opportunities observed in Cambodia – a unique, transitioning political economy and marketing system – elicited by more than two decades of field research (e.g., Shultz and Pecotic 1997; Shultz and Tith 1998; Rahtz and Shultz 2007). Updates on a longitudinal study of tourism development in Siem Reap Province are featured to make some key points (e.g., Shultz and Rahtz 2006). Subthemes include:

- Indicators vs. Actualities
- Social Justice
- Sustainability Challenges and Resource Management – e.g., Forests, Culture, Archaeological Treasures, Water, Extinctions
- Political Challenges/Opportunities: local, domestic, Lower Mekong Basin, ASEAN, Global
- Education Challenges/Opportunities
- Public Health Challenges/Opportunities
- Unjust Enrichment vs. Citizen Disenfranchisement
- Kleptocracy vs. Democracy
- Technology vs. Transparency
- Constructive Engagement vs. The China Card
- Interpretations and Influence by the Arts and Popular Culture

We conclude with some suggestions and discussion for further research, with implications for better understanding of important macromarketing issues and redoubled efforts for constructive engagement to enhance individual QOL and societal well-being in Cambodia and the Lower Mekong Basin.
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Engaging students in the reality of macromarketing: A classroom exercise connecting sustainability goals to economic objectives

Julie V. Stanton, The Pennsylvania State University

Introduction and Goals

Since modern goals of “sustainability” capture both societal and environmental considerations regarding consumer and producer activities, instruction that seeks to connect sustainability with economic strategy must allow for a wide range of concerns and lessons. Some lessons are product or industry specific such that sustainability goals may be constrained by technological or production issues. In other cases, the lessons stem from societal rules, national laws and other norms which guide consumers and producers to new choices. Further, the ranking and understanding of specific sustainability issues are not broadly shared, suggesting that some will struggle to achieve their sustainability goals, while others will easily ride the proverbial wave of public support. The semester-long exercise described here is designed to give students the opportunity to draw such connections at the micro level, using specific product examples and an open toolkit, while imagining a “new” outcome that also works at a macro level.

Because their future professional paths will include an endless set of challenges and contexts, the exercise is also designed to keep the students in charge of what’s next for their product. Any company can consider a more sustainable path for their products, operations and supply chain, but how much is achieved and how it is accomplished will be unique. This exercise preserves that reality, and provides students with a chance to consider, accept, reject and revise alternatives to their original product, adding increasing levels of strategy development as the semester ensues.

Within the course for which this exercise was developed, the overall goals include identifying and debating socio-ecological challenges, understanding tenets of consumer behavior, placing product changes within the existing market, and challenging expectations inherent in the traditional 4P’s before finally reflecting on how an organization must transform internally in order to achieve society’s or the firm’s sustainability goals. This exercise is designed to touch on each of these major goals.

Finally, it is worth indicating here that the exercise involves creativity, reflection, critical analysis, team skills, role play and overall development of marketing skills. It can also be adapted to accompany a different textbook or for a different business class.

Background

As mentioned, the activity takes multiple sessions to complete, with gaps in between such that the first stage occurs early in the semester and the last stage in the last few weeks of the semester. The course for which it was developed is a 15-week, 400-level course for business majors and entitled “Sustainability Marketing”. For the last few years, the course has used Belz and Peattie (2012) as the textbook, accompanied by assignments and discussion sessions on Humes’ (2013) work Garbology. In addition, students generate a daily journal for the first month of the course, gradually engaging with their own product, consumption and waste choices, after which they select a behavior to attempt to change. Finally, in teams of two, students prepare separate presentations on a sustainability problem and on a common “solution” to sustainability concerns. It is in this overall context that the exercise described here is undertaken.

One of the fundamental aspects of the Belz and Peattie text is the discussion of the 4C’s as an alternative to the traditional 4P’s of marketing. In a nutshell, Customer Solutions replaces Product, and captures a shift from presenting an already-made product to consumers to instead...
seeking answers to the daily challenges or desires of consumers. Cost replaces Price and reflects on the whole system of costs associated with seeking out, learning about, acquiring and the purchasing a product, in addition to usage costs and disposal costs, quite different from simply a purchase price perspective. Costs need not be financial only, nor recognized directly by the consumer. Convenience replaces Place and captures a much broader set of factors related to where to acquire than just the retail outlet, but also convenience during use and in post-use. Finally, Communications replaces Promotion, reflecting not only the breadth of marketing tools with which most marketers already engage, but disconnecting the notion that sales have to be pushed onto consumers, seeking instead a two-way communication.

In order to provide students with an in-class opportunity to reflect on these broader constructs and to engage them on the nuances and alternatives that they could consider, this exercise was developed. By the end, the students have a portfolio of detailed arguments for how and why a particular product can be made more sustainably, both in terms of socio-ecological concerns and economic goals, and will be prepared to articulate their arguments to others. While this is a micro-level task, the context and goals are inherently macro-level, as described below.

**The Exercise**

As indicated, the instructor who uses this exercise can adapt it for other timeframes and other orientations of a sustainability-related course. Since this exercise has been used at the 400-level over 15 weeks, that timeline will be referenced below.

**STEP 1:**

- During one of the first few weeks of the semester, when the overall goals of sustainability are not yet fully digested by the students, the instructor should separate the students into groups. Smaller groups of 2-4 persons work best to allow each student a chance to contribute.

- Each group should be assigned a generic product or service (e.g. household toaster, cellphone, washing machine, car, hair salon), and be allowed to confer for 15-20 minutes on what they believe would make for an “ideal” version. The only guidelines are that the students should keep track of their ideas, and any characteristic of the product is open for imagination. (These characteristics may be physical, or relate to purchase, use or disposal traits, but the instructor should not explain that just yet.)

- Groups then present to the class their new “ideal” product. If the classroom allows, the instructor can tape full-page printed photos of each generic product in its own space on the board and make room for students to write the characteristics of each new “ideal” version. This approach will allow students to see a side-by-side comparison of the angles from which they considered what “ideal” meant. (The instructor can also take photos of these descriptions for later reference.)

- This session can conclude with students comparing the characteristics and having a discussion of the ease or difficulty of accomplishing them, especially for mass market delivery. Any traits that fit under the socio-ecological umbrella can then be highlighted for discussion and used as an insight into options that will be further considered in the course.

**STEP 2:**

- In a subsequent session of the class (approx. week 3 or 4), the instructor should introduce the “Socio-ecological Impact Matrix”, a template which fosters a discussion about (different intensities of) societal and ecological impacts generated at each stage of a product’s creation (included as Appendix A). A reflection on the product’s supply chain is helpful at this stage.
Students are then regrouped as they were for Step 1, and asked to complete the socio-ecological impact matrix for the more generic version of the product they had previously discussed. Completing the matrix means that they label as “high,” “medium” or “low” the impacts that the production of their product has on each of the indicated concerns (e.g. energy consumption, water quality; health). This exercise is necessarily cursory regarding any scientific evidence for their arguments, but helps to highlight aspects of a product’s creation that may not have been discussed in the earlier activity (Step 1).

The instructor can project onto the classroom screen the photographs he/she took of the “ideal” characteristics from Step 1, and generate discussion along two lines:

1. What they want to change about their “ideal” product given the lessons from the matrix; and
2. What would change in their drafted socio-ecological impact matrix given their proposed “ideal” traits.

Student should write any new traits on the board once again and perhaps generate a “remove” list from their original “ideal” once the socio-ecological impacts were considered.

Having this discussion across all products helps the class sort out what “ideal” might mean if they incorporated the socio-ecological impacts of the generic product. It also allows a conversation about push v. pull strategies for sustainability – when do market pressures dictate changes to products, such as when public attention on plastics in the ocean lead companies to adjust packaging to reduce reliance on plastics? A firm which ignores its significant socio-ecological impact at any stage may be subject to such scrutiny and pressure. This step also provides students with a personalized version of goal-setting with respect to sustainability.

The instructor is encouraged to collect the matrices and take fresh photographs of the “ideal” product descriptions.

STEP 3:

Approximately two weeks later (about week 6), the general classroom discussion should switch to marketing strategy. In this phase, the instructor should regroup the students and ask them to reconsider the “reasonableness” of their updated “ideal” versions, as their goal now shifts toward developing a plan of action for marketing the product. The “reasonableness” threshold may need to be argued among the students, but one guideline is that any unrealistic (e.g. an app that turns a photo of food into a dish ready to eat) traits should be removed. Students should also be free to add new features, as they are still effectively in the design stage of their sustainability response. This discussion can be done as a class (for feedback value) or within their groups.

Then, the students should be given 20-30 minutes to develop, within their group, at least one example of a barrier and one example of a point of opportunity for each of the following micro and macro forces affecting their “ideal” product’s success (see chapter 6 of Belz and Peattie for more explanation). Students should be specific, and can be encouraged to use their phones or laptops for research reasons, if necessary. A template for their use is included as Appendix B.

MICRO forces: market actors, such as types of customers, suppliers, competitors; public actors, such as the media, public interest groups, local community groups; and political actors, largely government officials as various levels.

MACRO forces: economic environment, such as economic stability, price levels, market v. non-market systems; political environment, including election cycles, party-in-power, and international considerations; technological environment, reflecting the current and emerging
technologies that affect both what is possible and what consumers expect; socio-cultural environment, including consumer preferences, shared cultural traits and common public discourse; demographic environment, including any age, gender, ethnic or other traits that could be relevant to a product’s success; natural environment, including climate, topography, pollution levels, and natural resources available.

• When enough time has passed, the instructor can either read through the list of micro and macro forces and ask for examples – a tactic which allows the focus on how important those individual forces can be in dictating a product’s success – or instead treat each product as a mini-case for the class to digest and debate. In either case, this discussion can easily take 30-40 minutes.

• For the students, the benefit of this stage is to get realistic about the forces which shape their ultimate strategies. Not every idea – as attractive as they may see it – is going to work given the broader forces at play. Thus, as a final step, the students should identify the top 5 specific barriers (which may include more than one in any of the micro/macro categories) in terms of presenting the most significant challenge. As a representative from each group shares what those are, the instructor can keep a tally on the board, and through it, illustrate for the class whether the barriers tend to fall into a few types or are truly different for each product. A discussion of how companies handle such barriers can also be conducted, if time permits.

• The instructor should, again, collect the worksheets for future reference.

**STEP 4**

• During about week 12, this exercise puts students through an investigative effort to make sure that they have designed a product that meets sustainability objectives effectively. While no product will solve all relevant socio-ecological concerns, the students can move their product forward as a good alternative to the status quo. This activity involves role-play, and incorporates the 4C’s that will have already been covered in class. An entire class period may be needed for this Step.

• The instructor should group the students once again, but this time assign them an “opposing” group. (If there are an odd number of groups, then one of the matches can be 1 v. 2 groups.) The group whose product is in focus is the “marketing” group. The opposing group takes the role of the potential customer.

• The marketing group should be given a set of instructions that guide them to identify what aspects of their “ideal” product make sense given the customer base available to them, and through that begin to identify the major components of their 4C’s marketing strategy. It is their job to truthfully and meaningfully pitch their new product’s features to the potential customers so that they represent its innovations effectively. Their instructions (see Appendix C) lead them to:

  • Review the proposed new product with customers and listen intently to the feedback on each feature
  • Gather indications of where price could be an issue, but also where customers react favorably to reduced search, use or disposal costs associated with the product.
  • Explore purchase-related preferences such as retail locations, but also how the product can be said to have most improved the customer’s experience, compared to the generic version.
  • Identify components of the product which most speak to customers, including whether or not sustainability features matter, and carefully elicit additional product features from the customers.
The “opposing” group – the customers – will be given a mixed set of instructions, as their role is to challenge the assumptions and comfort of the marketing group. It’s important to give these students narratives from which to generate their responses, and time to review those narratives carefully before the discussion begins. The more they stick to their instructions, the better the information gathered by the marketing group. Examples are given in Appendix D.

One set of customers will be stay-the-course consumers, only interested in new features that don’t cost anything extra.

Another set will be those with interest in innovative products, but no particular focus or interest on sustainability attributes of products.

A third set will be the “green warriors” who are game for anything that really generates an improvement in our socio-ecological impacts.

Students in each marketing group are learning what they need to move to the final stage of the exercise and hence are encouraged to take particularly good notes from their interaction with the customers.

**STEP 5**

Finally, during the next to last week of the semester, the students are asked to present a formal pitch for their product. As desired, other faculty, staff and students could be invited as interested parties to the pitches. (This is a great way to involve part-time faculty in the broader curriculum, as well as a way to generally expand discussion of sustainability on campus. If there is a sustainability committee, that group makes a good target for invitation as well.)

Each pitch should be kept to 5-8 minutes, but should be shaped as a pitch to investors, such as on Shark Tank, such that the students make the entertaining but informative and reasonably detailed pitch that product has merit in the market. To get to this point, the students will have had to:

- Review their (extensive) notes from Step 4 and make adjustments to their product – in every aspect – as needed.
- Generate some visual to help represent this imagined product.
- Develop a marketing strategy, including who the target segments are, how it would be priced, how interested consumers would learn about, find and obtain the product, and what the positioning strategy would be.
- Develop a sustainability pitch, effectively arguing why the product meets customers’ needs; has reduced costs of purchase, use and post-use stages; separates customer costs v. socio-ecological costs in the description, and potentially changes consumer behavior.
- Getting the feedback from the investors can be either simple or complex. For a simple approach, investors (and any other audience members) can be given a ballot on which to vote for the top two products that they believe have been presented the most effectively in terms of satisfying consumer needs and addressing socio-ecological considerations. For a more complex approach, the investors can rate the presentations using a scorecard as illustrated in Appendix E. (In either case, the investors could be given a couple of minutes to provide general feedback to the class while the instructor tallies the votes or scorecard values.) The winning group can be awarded with extra credit points, a small sustainability product (e.g. reusable shopping bags), or other item.
Outcomes

This exercise has been developed over the course of several semesters, sometimes just using Steps 1 and 2, but more recently adding Steps 3 to 5. The most interesting aspects of this exercise, from the instructor perspective, are:

1. Students reveal their sustainability interests and concerns every single time. Because socio-ecological concerns are not shared identically across populations, it can be hard to get students to express their views early on in this course. One barrier is the perception that each student is the only one who might care about a particular socio-ecological concern (e.g. homelessness v. endangered species v. fair returns to farmers), and thus may be embarrassed or labeled if they share their views. This exercise provides the easy vehicle to express their concerns, and makes them own the process. They open up more easily.

2. Students make progress as sustainability scholars through the assignment. Most of the time, there is little reflection of sustainability factors in Step 1. Perhaps one or two groups will mention something about recyclable components or packaging, but most will focus on the consumer’s experience with the product during use. Step 2 quickly changes this as they are forced to either attempt to address the impact areas of their matrix or otherwise assert that they do not care about those impacts (rare). The conversation regarding how to address the impacts changes each semester, based on students’ prior perspective or comfort with industrial technologies. In the present case, nearly all of the students have taken an introductory supply chain management course before taking the sustainability marketing course, so the idea of influencing suppliers is reasonable to them. However, what can be done is something they then grapple with.

3. They learn how to balance lofty goals with realistic counterforces. Step 3 really brings this home, as they lament how some of their ideal product features simply will not be accepted by enough consumers, or will bring about new socio-ecological impacts that they then deem undesirable. It hones their sense of finding a sweet spot of making a difference from a sustainability perspective while working within a macro system that pushes and pulls the firm in various ways.

4. They learn to listen to their “customers”. While groups vary on their seriousness in the details, most recognize that the discussions in Step 4 represent real issues in their attempts to create a new, meaningful product. Most often, this is when they first get oppositional perspective on some of the ideal product’s traits (“Who cares if you can get a massage at the same time as someone is cutting your hair? That’s crazy!”). Where it’s interesting is listening to the marketers “sell” the sustainability traits – such as explaining how a new idea will save customers effort and time, instead of focusing on purchase price. These are the new thought processes for which this exercise was designed.

5. The creative component emerges and seems to “stick”. Once the students have imagined what the ideal version of the generic product can be, they don’t really want to let go of that “rethinking” opportunity. While they defend some aspects of their “ideal” version vigorously, they’re willing to make adjustments as they learn what will and will not work. As they move through the steps to where they have to pitch the idea to their ‘investors’, they also creatively entertain, aware of the positive energy they can create.

6. The exercise impacts other parts of the course. The exercise was originally designed simply to exhibit how narrowly we tend to think about current products, accepting relatively minor innovations as ‘cool’ and ‘new’ and not challenging those starting assumptions. Even in that simpler form (Steps 1 and 2), the details of this exercise have tended to enter the classroom discussion on ‘off’ days. In addition, the separate journal assignment required in the course...
has been affected, as students’ reflection on their weekly resource use and waste generation takes a new tone, a little harshly judgmental of their current habits. That’s an interesting multiplier effect.

7. The exercise, while challenging at times, is fun. This set of in-class activities is not graded, at least up to now. Of course, that means we keep the tone light and instructive, rather than heavy or judgmental, but the students rise to the challenge of Steps 1-5 because it’s interesting to do. The external audience, such as other faculty and staff, also enjoy the experience. Surely, some of that is in taking on a Shark Tank billionaire’s role, but mostly it’s in the way that the student ideas are intriguing for what may come in the future.

Conclusions

This exercise will not fit everyone’s needs, even with adaptations, but it does generate a lot of extra discussion and critical thinking skills regarding sustainability issues. There are several ways that the exercise could be adapted for different contexts:

1. Using a different marketing textbook. The supplementary materials provided here are useful to support instruction that is based on a different book. The most significant effort required from the instructor will be to either present the 4C’s independently or replace it with topical representation of how traditional marketing strategy needs expansion to help companies fulfill sustainability goals.

2. Teaching over fewer than 15 weeks. Using this exercise in highly abbreviated timelines such as for 3-4 week classes may be too difficult, but if the more typical half-semester timeline applies, the instructor can simply incorporate the exercise into every week. Alternatively, it may be appropriate to adjust expectations to where this is a graded assignment and considerable research and effort is done by the teams outside the classroom. Hybrid classes would make this particularly appropriate.

3. Teaching in a lower-level class. The biggest advantage to running this exercise in a 400-level course is that students can draw on prior marketing and general business lessons to help them in their discussions and designs. If the instructor wishes to use the exercise in a lower-level course, the instructions provided as well as expectations from class discussion will have to be adjusted accordingly.

4. Incorporating into a non-marketing class. This exercise could easily be adapted to general management, operations management, supply chain management and even financial analysis classes. The main point of adjustment is Step 4 where instead of focusing on the 4C’s, the instructor should incorporate course-specific criteria, such as sustainable KPIs or aspects of ROI. Steps 3 and 5 would also be modified slightly but much less than Step 4.

References


APPENDIX A: Socio-Ecological Impact Matrix

For your product, indicate where the impacts are high, medium or low, using either H, M, L or distinct shading for each.

<table>
<thead>
<tr>
<th></th>
<th>Raw materials/cultivation</th>
<th>Primary processing</th>
<th>Parts manufacturing</th>
<th>Final mfrg &amp; assembly</th>
<th>Distribution</th>
<th>Consumption</th>
<th>Disposal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource use</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy consumption</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Air Quality</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Water Quality</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Soil Quality</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Waste Generation</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land Use</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Ecosystem Health</td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Human Health</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human Equity</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
## APPENDIX B: Worksheet for Identifying Micro and Macro Forces

<table>
<thead>
<tr>
<th>Micro and Macro Forces</th>
<th>Specific Barrier(s)</th>
<th>Specific Opportunity(ies)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market actors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Actors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Political Actors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Economic Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Political Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technological Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Socio-Cultural Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demographic Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Natural Environment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX C: Worksheet for “Marketing Group” for Step 4
(Expand size of response boxes to make this a double-sided form.)

Instructions: As the preliminary marketing team for your new product, your goal is to explore potential customer reactions to the new product’s features. First, provide your customer audience with a good description of what your new product is all about. Then, be sure to identify their perspectives on each of the following issues (following the 4C’s).

**Customer Solution** – identify aspects of your product which either match your customers’ interests or otherwise seem to be a mis-match to their needs & wants.

**Cost** – identify the nature of the price concerns raised by your potential customers. Do any other aspects of cost, such as reducing their usage costs or disposal costs resonate with the customers?

**Convenience** – identify the aspects of your product which seem to better improve the overall customer experience that people can expect, including how/where to obtain it, and how easy it would be to use.

**Communication** – identify the aspects of your product which speak most meaningfully to your customer, such that they would be part of an ad or on a label. Do sustainability features matter?
Other Features – Record here any additional product features that your potential customer group has led you to believe are important to include.
APPENDIX D: Sample Narratives for Step 4

These narratives can be modified per the instructor’s sense of how their student body would relate to the descriptions. Perhaps reference to local stores would make the narrative “fit” better. Once the instructor is satisfied with the wording, the narratives should be printed on separate sheets, so that a student sees only the narrative that applies to him/her for Step 4.

**Customer Group #1:**

- You are the “stay the course” consumer. You are happy with the products you already have available to you, and don’t feel the need for any “new and improved” versions that manufacturers put on the shelves every so often.
- You may have switched here and there to a “lower fat” version of a cookie, or upgraded your cell phone to having faster data streaming, but most of the time you don’t think these changes are worth the price they charge.
- When you do show interest in something new, that also tends to cost more money, you want it to be really different and still not break the bank.

**Customer Group #2:**

- You are the innovation-loving consumer, perhaps even an “early adopter” of new products. You are mostly driven by trying new things, changing up the every day patterns of life, and are not overly concerned about the price of a new product if it otherwise strikes your fancy.
- You are the first one to have the newest version of a cell phone, even if your previous phone is relatively new to you. You buy new clothes each season, getting rid of most of the old wardrobe. You like change.
- Your focus is on how any product will fit into your lifestyle and enjoyment.

**Customer Group #3:**

- You are the “green warrior” consumer. Your priority in your consumption is to reduce your footprint on the natural environment and to contribute to social justice.
- You still commute to school or work, drive your own vehicle, eat out with friends, etc. but are conscious of how our air, water, natural eco-systems and own bodies are affected by the processes that lead to consumer products.
- If you found just the right product that would dramatically reduce your eco-footprint, you would champion it to your friends.
APPENDIX E: Shark Tank Evaluation Sheets (Step 5)

Use or modify this form to provide a tool to your “investors” to evaluate the students’ pitches. You can add criteria that better match your classroom style and progress made on the overall goals of the assignment. To keep it simple for the investors and for you to tally up, you’re encouraged to maintain point values that are even (e.g. each criterion worth 10 points). Print the following on a separate sheet of paper.

**Instructions for Investor:** The student teams are supposed to pitch their revised product to you in a way that convincingly illustrates the product, their marketing strategy and their contribution to sustainability goals. Please score them using the following guidelines.

**Product:**

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Points out of 10</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Product explained clearly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Target segment identified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Pricing strategy included</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Communications strategy provided</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Retailing strategy explained</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Fit with customer lifestyle explained</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Impact on customer costs explained</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Change in consumer behavior described</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Socioecological benefits from change explained well</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 “Fudge Points” – your own criterion</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL out of 100**
The Macromarketing of Women Economic Empowerment and its Disconnections with Micro-level Lived Realities: The Importance of Considering Time Poverty in Well-being & Empowerment Studies

Laurel Steinfield, Bentley University, Waltham, USA
Diane Holt University of Leeds, Leeds, UK

Abstract

Social innovations and interventions have been promoted as a means to improve the well-being of subsistence consumers. Often these innovations and interventions, such as women’s economic empowerment, are imposed by external market actors—some large such as MNCs, and other grassroots-based organizations, such as local NGOs or social entrepreneurs. Many attempt to address the global phenomenon of gender-based inequities: as the UNDP (2018) reveals, there is no country around the world in which women are treated equally as men, which in turn result in a myriad of economic, legal, socio-political and personal disadvantages. While some women’s economic empowerment projects and programs have had success to some extent (London, Anupindi, and Sheth 2010; London and Fay 2017), our empirical data of such initiatives suggests that there are often unintended consequences. These consequences arise, in part, because the external market actors fail to understand the micro-level lived realities. There is a tendency to give primacy to hegemonic, macro-level discourse of ‘economic’ empowerment (Keating, Rasmussen, and Rishi 2010; Nieuwenhuis et al. 2018). This can come at a cost of true empowerment and well-being – that is, living a life that is valued (Nussbaum 2000; Sen 2001).

By applying a critical lens to initiatives aimed at ‘empowerment’ we reveal a disconnection in the system. We focus specifically on how ‘empowerment’ initiatives can fail to account for gender dynamics, and thus increase the time poverty of women. Time poverty relates to the increase in demands placed on a person’s time, which in turn can decrease time for rejuvenating activities such as sleep, rest periods, the pursuit of hobbies, and social interactions with family and friends (Vickery 1977). As this paper reveals, the governing assumption of women’s economic empowerment is that women will have additional time or the capacity to reallocated time to pursue economic opportunities. Whether this is the case or not, is rarely considered. Consequently, time poverty remains an under-explored area in entrepreneurial, macromarketing and subsistence markets literature, even though, as this paper will demonstrate, it has significant implications for the well-being of women and success of empowerment initiatives.

In this paper, by looking at data collected from observations and interviews with subsistence farmers in rural Kenya, we reveal how an intersectionality lens can help us answer the question: who is at a greater risk of experiencing time poverty? We reveal how the neoliberal agenda of imposing responsibility on subsistence prosumers to escape economic poverty can shift or amplify poverty to other dimensions, such as time. We demonstrate how gender and class matter and consider implications for our conceptualization of well-being, empowerment and avenues for future research.

Keywords: Women economic empowerment, subsistence markets, time poverty, well-being, gender inequalities, socioeconomic class
References


Introducing the topic and the purpose of the research

Food waste has become an important topic for marketing and consumer research in the past few years (Aschemann-Witzel et al. 2018; Baron et al. 2018; Närävänen et al. 2018; Porpino 2016). As an issue, food waste is characterized by all three of the sustainability dimensions: economic, environmental and social. At the same time as edible food is lost or wasted across the food chain, causing environmental impact and economic inefficiencies for food producers and manufacturers, a large proportion of the world population suffers from hunger or malnutrition. The issue has become better acknowledged also in political agendas since the UN has set the target to halve food waste by 2030 (SDG12). While different kinds of social marketing programs have been established around the issue of food waste (see e.g. Aschemann-Witzel et al. 2017), the topic has gained only scarce interest in social marketing research, and in the rare cases, it has been approached from a rather practical level, focusing on individual consumers (Pearson and Perera 2018). A more theoretical perspective is still needed.

Early studies on food waste showed that the majority of food waste in developing countries is produced at the end of the food supply chain (see e.g. Bräutigam, Jörissen, and Priefer 2014), mainly in households. In their research, Aschemann-Witzel et al. (2018) provide several macromarketing actions and policies targeting different kinds of consumer segments in order to reduce food waste. More recently, food waste has been conceptualized as a wicked problem (Närävänen et al. 2019), involving many stakeholders and complex interconnected dimensions (Kennedy 2016). Although consumers have been broadly responsibilized to make the change, due to the complexity of the problem, putting the emphasis on individual-level is not enough (Canali et al. 2017; Evans, Welch, and Swaffield 2017). For instance, household food waste is influenced at various stages from food package design and labeling (production stage) to store display and pricing (retail stage) to planning and storing of food (household stage). Furthermore, institutions such as food industry’s regulations about the appearance of food, different cultural norms about the edibility of food as well as retailers’ policies and power have an influence on the issue (Baron et al. 2018; Devin and Richards, 2018). Food waste and loss occur throughout the food system, and a multi-actor, multi-level perspective is required (Canali et al. 2017).

Therefore, more efforts should be put on the macro-level structures – especially the socio-cultural level where food waste behaviors and practices are constructed, in terms of normality, acceptability and desirability – creating social pressure to address the problem (Gollnhofer 2017; Spotswood and Tapp 2010). Previous research has shown that sustainability issues, such as food waste, are increasingly discussed and debated in the social media where different actors participate in the discussion (Närävänen et al. 2018; Pearson et al. 2016). The purpose of our study is to examine how market actors participate in the socio-cultural construction of food waste through social media. We approach this question from the perspective of social marketing, as we focus on how a social marketing program enables the construction of an issue arena (Luoma-Aho and Vos 2010) around food waste. Our findings contribute to social marketing by increasing understanding of social media as a forum and in particular, how it can facilitate multi-level engagement (Shawky et al. 2019). Furthermore, the paper provides a methodological contribution to social marketing by applying netnography, which has been suggested as a fruitful method to generate deep cultural insight (Brennan, Fry, and Previte...
By focusing on the negotiations and discourse constructions taking place on an issue arena, the study also contributes to the literature on macro-social marketing and macromarketing, especially regarding socio-cultural change (see e.g. Prothero, McDonagh, and Dobscha 2010).

**Theoretical background**

The research adopts a constructionist and interpretive research philosophy. The reality is seen as continually constructed in people’s behaviors, words, and sayings – also in digital platforms. Our approach is thus in line with the cultural perspective in social marketing which emphasizes the need to understand the sociocultural dynamics in driving social change (Spotswood and Tapp 2013).

In this research, we view the social discourse on food waste as a macro-level construct. Discourses and the way they are used and constituted through language set the stage for certain kinds of understandings and thoughts. Discourses can be defined as the process in and over time where meanings are re-negotiated among different participants and sites for interaction (Hirschman, Scott, and Wells 1998). Thus, the way the food waste issue is discursively constructed steers the institutions around it, and constructs certain kind of practices and relations of different market actors connected to the issue (Fitchett and Caruana 2015). Therefore, the language does not merely reflect reality, but actively constructs it (Berger and Luckmann, 1966). Within macro-marketing literature, discourses have been used either as a theoretical lens or a methodological tool to approach, for instance, evolving cultural discourse on a brand (Gao, 2013), consumer resistance (Valor, Diaz, and Merino 2017), green consumption (Prothero, McDonagh, and Dobscha 2010) and health consumption (Yngfalk and Yngfalk 2015). Our standpoint is that the discussion on food waste roots the phenomena to broader social paradigms (see e.g. Prothero, McDonagh & Dobscha 2010). Discourses are constantly re-negotiated over time on different platforms but also can be viewed as a setting stone for a certain kind of behavior (Fairclough 1992). Hence, studying discourses goes beyond analyzing communication, focusing instead on the performative power of the discourses in action.

We view issue arenas as sites for discourse construction. Issue arenas can be defined as ‘arenas that focus on the public debate about a particular issue among various actors in both traditional and virtual media’ (Vos, Schoemaker, and Luoma-Aho 2014, p. 201). Issue arenas are dynamic and constantly changing according to the interactions, and they gather together several actors, whose share of voice in the arena differs (Luoma-Aho and Vos 2010). The concept of issue arena has resemblance with the concept of public, which has been utilized in social marketing research (Guildry, Waters, and Saxton 2014) as well as in brand research (Arvidsson and Caliandro 2015). These studies highlight the ways in which publics in the social media are brought together by hashtags, posts and re-posts, as well as their ability to invite different actors to low-threshold participation. When a certain issue arena grows wider, more and more actors involved, the discussion on the issue arena may start to shape the discourse on the issue.

An increasing number of people use social media on a daily basis, participating in discussions related to different issues. Hence, several social marketers have realized the potential of social media in order to boost the consumer engagement (Shawky et al. 2019). Still, there is a lack of research focusing on the ways social marketers can actually integrate social media in their programs (Shawky et al. 2019). As suggested by Guildry, Waters, and Saxton (2014) social media has become an interesting platform and suitable especially for social marketing initiatives aiming at moving beyond personal change to broader social change. In addition to involving different kinds of market actors, social media can make otherwise implicit macro-level structures, such as discourses on food waste, visible and open to change. However,
research on food waste is only beginning to conceptualise and theorise the role of social media in how different actors perceive, create and disseminate the sociocultural meanings related to food waste (Närvänen et al. 2018).

**Methodology**

We utilize both social media monitoring (SMM) tools and interpretive analysis that draws from netnography (Kozinets 2015; Reid and Duffy 2018). While SMM tools often provide (often organizations) simplified data about social media and online discussions, the more ‘deep’ dive into the data allows us the means to effectively generate and analyze the data to explore how market actors participate in the socio-cultural construction of food waste. The methodological approach bringing data gathering through SMM tools together with intensive netnographic analysis has been referred as netnographic sensibility (Reid and Duffy, 2018).

The empirical analysis focuses on the social media discussion during “Food Waste Week” in 2018. “Food Waste Week” is a Finnish nation-wide non-profit social marketing program initiated in 2013. The aim of the program is to reduce food waste especially at the end of the food chain. The program involves many actors, such as consumers, food manufacturers, retailers, catering companies and other organizations. The program includes information sharing, seminars, research, events as well as collaborations with schools and influencers. As “Food Waste Week” has grown bigger each year, it has become increasingly popular among the public. The data retrieved from social media monitoring tool proves that, for instance year 2018, the public discussion on food waste matters skyrocketed during the main event of the program, both in traditional and social media. Due to this clear peak in the volume of the discussion, we can say that the program was able to initiate an issue arena around food waste, which we study in this paper. The final data utilized in this study consists of different kinds of social media material retrieved from Twitter, Instagram, forums and blogs, altogether 3409 public postings published in September 10-16, 2018. The data was analyzed using Atlas.ti software package. The analysis followed the general principles of qualitative interpretive approach involving several rounds of coding where the data was categorized according to market actors and their activities (Spiggle 1994). These categories were given meaning through our interpretive framework, which draws from the theories on issue arenas and discourses, taking into account the context within which the data is produced (e.g. the specific interaction conventions of studied social media platforms) (Fitchett and Caruana 2015).

**Preliminary findings**

According to the analysis, the actors participating in the issue arena include for instance consumers, commercial companies, non-profit organizations, researchers, bloggers and political actors. After identifying the actors involved, we focused on how they made sense of and gave meanings to the food waste issue through their postings. Through the interpretive analysis, we identified that actors, for instance, shared their own expertise, gave information for the audience and praised some actors’ excellence in the fight against food waste. We also discuss our findings in relation to the descriptive statistics retrieved from the social media monitoring application. For instance, we present the reach of different postings (statistical data provided by the social media monitoring tool) in relation to their initiator, as well as which types of meanings are connected to which type of actor in the issue arena.

Combining descriptive statistics with the qualitative, interpretative analysis allows us to scrutinize the roles of different actors in shaping the discourse of food waste on the issue arena. Although consumers represent the largest share of the issue arena participants, their voice is not as heard (in terms of reach) compared, for instance, to the commercial companies whose postings’ reach is much larger. This finding opens up interesting ideas about the share of voice
and power among the participants and the dynamics within the issue arena. Being able to participate does not always mean being heard and hence, the actors with bigger audiences, such as commercial companies, have the power to shape the discourse. Furthermore, as noted in earlier research, consumers are often responsibilized in “the fight against food waste”, and this was also evident in this data. A large share of the postings were directly or indirectly pointed toward consumers, for instance highlighting different ways how consumers can lower their food waste levels.

Conclusions

This paper continues the discussion of social marketing’s move away from individual behavior change toward a broader focus on macro-level structures. Especially, we contribute to understanding socio-cultural change related to a wicked problem, the sustainability issue of food waste. While the traditional type of social marketing has focused on the individual behavior change with benefits for the individual, the topics concerning sustainability are a lot more difficult to solve with the individual focus. The problems, such as food waste, is weaved deeply into the social constructs and discourses and the benefit of changing one’s behavior is not as clear. Initiating an issue arena (whether offline or online) offers a way to raise important, yet wicked problems into the public discussion where several actors can be engaged. The implications to social marketers also include that creating an issue arena in social media allows for monitoring different ways in which actors create meanings for the issue and for their own role in it. Discourses enacted at the issue arena have performative power and hence the issue arena has the potential to change macro-level structures through for instance problematizing certain things and valorizing others. The paper also offers implications for social marketers and policymakers in terms of utilizing social media to engage different market actors. Depending on the nature of the issue, an open invitation to participate in interaction on an issue arena may have different kinds of outcomes, and therefore, we invite further research to focus on this topic.

References


Social exclusion in the credit market in Europe

Päivi Timonen, Centre for Consumer Society Research, University of Helsinki
Ilja Kavonius, Centre for Consumer Society Research, University of Helsinki
Juha Honkkila, European Central Bank

Our paper extends the literature on social exclusion by focusing on the credit market in Europe. We look at social exclusion from the perspective of access to finance, i.e. whether households have credit constraints and what constraints hinder access to credit. The underlying “triggers” related to the access to credit may differ: some households have applied for credit but financial institutions have refused to grant it to them, and other households have not even applied for access to credit due to self-perceived credit constraints.

The Household Finance and Consumption Survey (HFCS) collected in shows that the credit constraints vary between European countries. Typically, in Southern and Eastern Europe, the number of credit-constrained households higher than in Northern Europe (ECB 2016). We use this harmonized cross-European survey to analyze differences in credit constraints in several European countries and to analyze what the roles of income, wealth and indebtedness are in social exclusion.

References

Surveillance Capitalism: An Exploration into Research Directions in Marketing
Bradley M. Turner, Curtin University, Western Australia
Kenneth Yap, Murdoch University, Western Australia

Surveillance Capitalism
The online activities, or behavioural surplus, of consumers are being tracked and catalogued by the proprietary algorithms of a few major tech companies, aggregated and sold to advertisers who use the data to “act back on people” (Fourcade and Healy 2017, p. 10) to better fulfil marketing goals, whatever they may be. The process is made possible by algorithms that are opaque, mostly unregulated, open to change at any moment without warning to consumers and uncontestable (O’Neil 2016). The network architecture in which this takes place has become known as surveillance capitalism.

Surveillance capitalism is defined as the constant gathering of information (extraction constituting big data) used to fuel commercial interests (commodification) that creates substantial power (market control) “that effectively exiles persons from their own behaviour” (Zuboff 2015, p. 85). This abstract seeks to briefly explain surveillance capitalism, identify its harmful effect on consumers and suggest some research directions for marketing scholars.

Capitalism, as it was once known (with participants holding imperfect information) has been replaced/distorted, by the collective business models developed by a small number of tech firms who have taken ownership of mankind’s online data and placed its access behind a paywall. Put another way: under traditional capitalism people and firms needed each other for balanced mutual dependency (e.g. employment and consumption); however, under surveillance capitalism, people are targets for data extraction, with or without their consent.

There is no reciprocal need: People don’t need to be watched and tracked, and they certainly get no regular employment/financial compensation as recompense. It is true that some firms give price discounts for personal data, but this is rarely thought of as being a fair deal. In fact, the study carried out by Turow, Hennessy, and Draper (2015) found that the majority of participants (n=1506) were simply resigned to giving up personal data as “it is futile to manage what companies can learn” (p. 3). Data extraction is expected, and it is the norm; so consumers behave accordingly by submitting to the higher power of firms such as Google and Facebook.

According to Fuchs (2010), the power embedded in surveillance is an inseparable part of its concept. The global extraction regime, or ‘Big Other’ (Zuboff 2019; 2015), built on the logic of continuous accumulation to drive profitable behaviour modification, is a threat to consumer freedom. With little to no knowledge gap between what the firm knows and how the consumer acts, consumer autonomy is severely compromised. This is especially the case as most consumers are ignorant of its operation, or at least to the magnitude of its reach.

A ‘Benign’ Scenario of Surveillance Capitalism
Consider, for example, Google, the world’s largest micropayment system, where every search (keyword) is an automated auction, and according to Google, 5.6 billion per day. Google ‘search’ has become a search of the user. Some of the data Google extracts include: name, gender, birthday, age, phone number, search terms, visited websites, location (at any time for the past 5-8 years), favourite brands, relationship status, hobbies, home address, name of employer, Gmail content, device information, phone contacts, clicked ads, IP address, website visits and duration, calendar events, uploaded photos, app usage and frequency, mouse movements, ‘likes’ clicked, watched YouTube videos. In addition, a host more data are
collected from households fitted with Google Home assistant (e.g. recordings of conversations with Home assistant and overheard conversations). And even more data are extracted from people who use Google Chromecast (e.g. TV and movie viewing habits), Chrome browser extensions, or wear Google Glass or a Google Pixel smartwatch or smartphone.

All the information Google has about an individual can be downloaded upon request, and according to Curran (2018), who did just that, the file size totalled 5.5Gb and consisted of approximately 3 million Word documents. We can say with confidence that Google servers have extracted and sold data pertaining to the research carried out for this abstract. The authors of this abstract will keep an eye out for ads featuring Zuboff’s (2019) new book. Ironically, it is this book that champions a level of uncertainty to maintain consumer freedom. Indeed, some uncertainty is needed to keep the relationship between capitalism and democracy alive for asymmetry of knowledge translates into asymmetries of power that clearly favour the tech giants.

The logic driving surveillance capitalism (besides the accumulation of great wealth), was laid out by Google’s chief economist Hal Varian when he described the end-goal capabilities of Google Now (a voice command assistant that is part of the Google app). “People have come to expect personalised search results and ads. Google wants to do even more. Instead of having to ask Google questions, it should know what you want and tell you before you ask the question” (Varian 2014, p. 28). To achieve this, a truly astonishing amount of individual user data would need to be extracted. It appears Google is well on its way.

A More Insidious Scenario of Surveillance Capitalism – Unethical Target Marketing

Consumers don’t always know personal data are being extracted; nor do they fathom how it might act back in a harmful way. For example, ‘liked’ Facebook pages or the nature of uploaded photos have made some people a target for data extraction. For example, in 2016, the American Civil Liberties Union (ACLU) revealed that Facebook, Instagram (owned by Facebook) and Twitter gave ‘special access’ to Geofeedia to track ‘Black Lives Matter’ activists (and other types of activists) and sell their data to law enforcement (Levin 2016). Geofeedia’s access to data was cut off shortly after the ACLU’s public announcement, but the damage was already done.

Another instance is mouse movement data extraction. Recent studies have shown how mouse movement tracking can assess motor function for the prediction of Parkinson’s disease (Allerhand et al. 2018; Ryen, Doraiswamy and Horvitz 2018). The tech firm that extracts this information is under no obligation to inform the individual if mouse movement jitters are consistent with Parkinson’s; instead the data is likely to be sold to the individual’s health insurer who might increase premiums or cut off coverage altogether (McNamee 2019).

Think also about zip code data extraction, algorithms and discrimination reinforcement. If an algorithm deems a zip code too risky, a poor would-be student looking to better her life with an education, would be denied a loan (O’Neil 2016). In March this year, the US Department of Housing and Urban Development was moved to act and sued Facebook for allegedly enabling housing discrimination by giving access to extracted data to advertisers, who then targeted audiences that included or excluded certain racial, religious, or gender groups (Jan and Dwoskin 2019).

Near perfect information proved too much of a temptation during the 2016 US Presidential Election. The well-documented scandal saw Facebook expose up to 87 million user’s data to British ‘research’ company, Cambridge Analytica, whose vice president, Steve Bannon, also happened to be the chief executive of the Republican campaign. Tens of millions of Facebook users had their personal data cross-referenced against previously extracted personality data.
(that users volunteered to do for fun as part of a harmless-looking online test) and were then bombarded with personalised micro-targeted Facebook advertisements. The aim was to manipulate voting behaviour a certain way by showing different advertisements and news stories with different facts about the same issues to different people (Berghel 2018). The advertisements played on fear and were designed to purposely elicited outrage (e.g. towards political trigger issues like immigration, gun control, unemployment and same-sex marriage). This prompted message amplification via news item sharing and inflammatory comments, followed by new manipulative trigger issue news items, stoking even more outrage and inflammatory speech, and finally stripping individuals of their civility. It went on like this for weeks.

Berghel (2018 p. 83) suggests “micro-targeting on social media platforms lets a political campaign exploit the strongest emotions and play on the vincibilities and fears of the most easily manipulated among us”. It is not known how many people had their voting behaviour manipulated; however, as this abstract has tried to point out, surveillance capitalism is not limited to pushing advertising on specially targeted unwary people. Although that ought to be of great interest to marketers, rather surveillance capitalism is the digital experience; every app, every smartphone, watch, fridge, tv, tablet etc. anything internet-enabled is an interface for the flow of extracted data on its way to predicting each individual’s future.

The Journal of Big Data often features articles suggesting novel ways to more easily extract hard-to-reach data. For example, the use of condition probability combined with the bootstrap technique to extract the opinion aspects of customer reviews on social media (Nguyen, T.N.T, Nguyen T.T.H and Nguyen V.A 2019).

Another Insidious Scenario of Surveillance Capitalism – Propaganda

The scale, purpose and identity of the perpetrators made the Cambridge Analytica event a ‘scandal’; but the methods used – behavioural science, data analytics and micro-targeted advertisements – are still very much in use now. If anything, the events of 2016 and subsequent publicisation of the investigation proved to be a useful ‘how-to’ manual for advertisers. The Cambridge Analytica scandal showed how to tailor versions of reality to create a Truman Show-like experience, or ‘filter bubble’ (McNamee 2019; Allen 2012; Pariser 2011). Much the same methods can be employed today using Facebook’s user-friendly Ads Manager. The algorithms are designed to maintain attention and therefore maximise time spent on the platform, so, according to some, users are fed information that is familiar and belief-confirming (McNamee 2019; Allen 2012; Pariser 2011). A user’s feed may give the impression that many people share the same belief.

For example, news feeds often consist of the links a user’s Facebook friends are sharing. Clicked content will determine exposure to future content, limiting encounters to new ideas (ideological segregation); thus, beliefs became more rigid and extreme and creativity and innovation is limited (McNamee 2019). However, the extent to which this should be a worry is debated. Some have confirmed or partially confirmed ideological distance between targeted groups in the context of political leanings (e.g. Flaxman, Goel and Rao 2016 where n= 50 000 US citizens), while other studies found no hard evidence to support the filter bubble hypothesis; but did find Google to be biased against some news outlets and over-representative of others (Haim, Graefe and Brosius 2018 where n= 53 000 across 23 countries).

Filter bubbles appear to be real at least some of time, but which consumers are susceptible and how can they be helped to break free? Perhaps research needs to be narrowed to the participant attention level (e.g. heavy social media users) to increase the likelihood of revealing a filter bubble and the nature of its influence. It’s also important to know if some are more harmful
than others. Investigating exposure to new ideas online and offline may help to garner a better picture; for some consumers offline exposure may moderate the limitations of online exposure.

Democratic societies have some degree of control of state surveillance, but there is almost no regulatory oversight of the private sector. According to Pew Research Center, 45% of Americans turn to Facebook for news (Gottfried and Shearer 2017), yet Facebook insists it is not a media company. The same applies to Google. Both package and distribute media, but neither create it. They therefore operate outside the strict advertising guidelines that regulate competitors, print and broadcasting firms.

How Does Macromarketing Get Involved?

The call to admit to media company status and act according (like Yahoo eventually did) has been loud; but current business models rely on the maintenance of the status quo, so resistance to meaningful change is not surprising. In addition, given the surface-level line of questioning aimed at Facebook CEO, Mark Zuckerberg, at the 2018 Congressional Hearing on data protection, it appears that Senators are ill-equipped to effectively probe and, in this case, were unable to reach consensus regarding what should be regulated (Freedland 2018). The fact that Google and Facebook engaged in, and enabled others to engage in, marketing activities many would like to see stopped/reformed, should be seen as an opportunity to research the issues and get involved in the discussion. The findings have implications for marketing and public policy.

Engineering the context around a particular behaviour (e.g. voting, purchase, a ‘like’) threatens consumers freedom to choose. Predictions are about consumers, but not for consumers (Zuboff 2019). This being the case, the definition of consumer vulnerability developed by Baker, Gentry and Rittenburg (2005) seems to extend to billions of people. As fuel for the surveillance network consumers do face “a state of powerlessness that arises from an imbalance in marketplace interactions” and “It occurs when control is not in an individual’s hands, creating a dependence on external factors (e.g., marketers) to create fairness in the marketplace. The actual vulnerability arises from the interaction of individual states, individual characteristics, and external conditions within a context where consumption goals may be hindered, and the experience affects personal and social perceptions of self” (Baker, Gentry and Rittenburg 2005 p.134).

On the surface, this definition seems to capture the surveilled consumer experience quite well; however, while internet is included in the author’s conceptual model to define consumer vulnerability, it was included in a consumption context. What appears to be needed is a new external condition variable that accounts for Big Other’s use of an individual’s own data against them. Individuals who have an online gambling history, for example, could serve as this basis this type of research to explore the effects of micro-targeting such people.

Surveillance capitalism has, quite simply, profound implications for marketers and the research directions of marketing scholars. While there have been numerous papers written about social media, online engagement, parasocial online interaction, online privacy concerns, viral ads, eye tracking, recommendation engines etc, these papers have analysed but a part of the surveillance capitalism network architecture (a reductive tendency), few have taken a step back to see the whole beast. This is a call for macromarketers to pay attention and develop an agenda for research and investigation.

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Introduction
The overall goal of this study is to understand how personal factors affect the adoption of modern food consumption choices--i.e. use of processed foods, eating outside of the home, and convenience-based food shopping behaviors--in developing food systems. Our first objective is to examine how the adoption of new consumption choices are affected by three factors that can be conjectured to fundamentally affect attitudes toward the adoption of new food consumption options--i.e. “traditionalism” (prefer a traditional way of living), “DIY” (prefer doing it by oneself), and “time scarcity” (having a busy life). The second objective of this study is to examine how these relationships shift with time, as the new food consumption options become less “new,” --that is, more normalized.

Method
To fulfill these objectives, we examine these relationships at two distinct points of times--1996 and 2013--through surveys conducted in the city of Nanjing, China, bookending an era during which China’s food systems were dramatically altered. In each of the years, a stratified survey was conducted, using survey procedures that were designed to result in samples that equally represent each of the eleven oldest urban districts of Nanjing. To ensure quality, the survey was administered orally to respondents who self-identified as the major food shopper for their households. Survey techniques used in 1996 were matched as closely as possible in 2013 to allow direct comparison of the findings. Using data from the survey, we tested a model that examines how the three life style factors (traditionalism, Do-It-Yourself propensity [DIY], and time scarcity) affect attitudes towards three types of food consumption choices (processed food, eating out, and convenience shopping). Further, we examine how that model has changed over time in the period between 1996 and 2013.

Findings
The overall quality of the measurement model was evaluated through confirmatory factor analysis (CFA). Item purification was used to identify items with abnormally high kurtosis (i.e. weak item variance) or skewness (Hair et al. 2010). CFA helped ensure the validity of the retained measures by identifying any abnormality in the factor loading pattern, such as cross- or weak loadings (see Podsakoff and Organ 1986). Purifying the data resulted in samples sizes of 325 (year 2013) and 297(year 1996) respondents. The structural model's fit statistics indicate that all targeted values were achieved (Chi-Square/ DF<3.0; RMSEA<0.05; CFI and TLI > 0.90; GFI > 0.85) (Hair et al., 2010). These fit statistics, combined with substantive assessments of the scale items, suggest acceptable internal consistencies for the construct scales, offering assurance that the model is appropriate to test relationships among life style factors and food consumption choices.

The results of the tested model are displayed in Figure 1. As seen in the model, traditionalism had a significant inverse influence on attitudes towards use of processed food in 2013 but the relationship was not significant in 1996. Similarly, traditionalism had an inverse influence on attitude towards eating out in 2013 but not in 1996. Traditionalism was not significantly related
to attitude toward convenience shopping for food in either year. Do-it-yourself (DIY) propensity was negatively related towards attitudes towards use of processed food and attitude towards eating out in both 1996 and 2013. DIY was also negatively related to attitude towards convenience shopping for food in 2013 but was not significantly related in 1996. Time scarcity did not have a significant relationship with attitudes towards use of processed food and attitude towards eating out in either 1996 or 2013. Still, time scarcity was related positively towards attitude toward convenience shopping for food in both 1996 and 2013.

**Figure 1: The Final Models for 2013 and 1996**

**Remark:** The labels are showed in the following format: path weight of year 2013, Chi-Square different result between 2013 and 1996, (path weight of year 1996)

2013 $N=324$, 1996 $N=299$

Path Weight Value Significant

- NS = Not Significantly Different from zero
- * Significant Level at $P < 0.05$
- ** Significant Level at $P < 0.01$
- *** Significant Level at $P < 0.001$

Path Weight Significant Comparison between 1996 vs 2013 (Chi-Square Difference test)

- $\neq$ Not Significantly Different
- $\neq$ Significant Level at $P < 0.05$
- $\neq$ Significant Level at $P < 0.01$
Implications

Some of the results shown in the model are striking. In 1996, when options for processed foods and eating out were much more restricted, traditionalism is not found to be associated with attitudes toward the use of processed foods and restaurants. In China in the 1990s, the use of processed foods or eating in a restaurant, would likely be seen as an occasional act of novelty, rather than a routine behavior (Veeck and Burns 2005). It appears that the maturation of the market during the period between 1996 and 2013 was required for the traits of traditionalism and DIY to become associated with eschewing processed foods and eating out. Importantly, it was during that period that publication of food scandals escalated and ambivalence towards modern food shopping behaviors began to emerge (Klein 2013). Further, women’s employment decreased during this period, partially as a result of a return to more traditional gender roles at home and work in China, suggesting a generalized increase in traditionalism (China Briefing 2016).

The fact that time scarcity is not associated with positive attitudes towards the use of processed food or eating out is consistent with other studies that have found a complex relationship between being busy and seeking out convenience behaviors (Grunert 2006). Just as being busy has been viewed as a status symbol in the West (Bellezza et al. 2016; Sullivan 2008), there is evidence that being busy is also viewed as a status symbol in China. The “spillover” behavior from busyness in work to busyness in other areas of life seen in the West has also emerged in China. As such, it is not surprising that feeling that “I’m very busy” is not related to new food behaviors that could potentially reduce time spent in food preparation, such as use of processed food and eating out. In fact, feeling busy might also be the result of spending more time in food preparation.

While the relationships of traditionalism and attitude towards the use of processed food and attitude towards eating out were shown to be consonant—i.e.—have similar paths—the relationship of traditionalism and preference for convenience shopping was found to have different patterns. These findings are likely due to the fact that, while the use of processed food and eating out are directly associated with modernity, convenience shopping, as measured in our survey and in the context of contemporary China, may not be associated with new choices. As in other nonwestern nations (Goldman, Ramaswami, and Krider 2002; Huang, Tsai, and Chen 2015; Mele, Ng, and Chim 2014), the emergence of new retail formats, such as large, self-service stores, did not displace traditional markets in China. In urban centers with large concentrations of population, such as Nanjing, a wide variety of food retail venues, including traditional food markets and other smaller food retail formats, were widely accessible in the 1990s and 2000s, and continue to be available. Hence, it is not surprising, that traditionalism and DIY would not be associated with convenient food shopping. Likewise, it makes sense that time scarcity would be associated with a propensity to seek ways to reduce food shopping time in both periods of time. If the third new food shopping behavior that had been measured had been use of supermarkets, rather than convenience shopping, than the resulting paths might have proved to be similar to those related to use of processed foods and eating out. However, measuring attitudes towards supermarket use would not have been possible with this study, since large supermarkets had not yet arrived in Nanjing when the 1996 survey was administered.

Conclusion

To our knowledge, this is the first study that has systematically studied the relationship between personal factors and new food choices in a developing economy via dual-period surveys. The results reveal complex relationships between personal traits and the adoption of new food shopping behaviors, indicating that supply-side models of retailing development are
insufficient to adequately predict changes in food systems. While consumers are assumed to continually “modernize” their patterns of food provision, adoption of new choices often involves de-escalation and retraction. As this study demonstrates, consumers in disparate places at varied times may adopt new purchase options at different speeds and enthusiasm according to demographic, personal, and lifestyle factors.

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Well-Being Through Negotiated Agency: A Study of Women Entrepreneurs in Subsistence Contexts

Srini Venugopal, Grossman School of Business, University of Vermont, Burlington, USA
Madhu Viswanathan, Gies College of Business, University of Illinois, Urbana-Champaign, USA

Abstract

Millions of women entrepreneurs in subsistence contexts are embedded in strong patriarchal social institutions where the place for women is considered to be within the house. Yet, these women are able overcome institutional barriers, exercise entrepreneurial agency and enhance their own well-being in the process. We undertake an ethnographic study of women entrepreneurs in low-income neighbourhoods of Chennai, India, to understand a) why low-income women start enterprises? b) how they overcome the ‘iron cage’ of institutional norms and engage in entrepreneurial action? and c) what are the consequences of entrepreneurial action on their well-being? Our study offers a nuanced understanding of the transformative potential of entrepreneurship for women in subsistence contexts.

Keywords: Women’s entrepreneurship, poverty, subsistence, well-being, base-of-the-pyramid
A brand’s involvement in socio-political issues: Seeking positive social change or jumping on the bandwagon for profit?

Jessica Vredenburg, Auckland University of Technology
Sommer Kapitan, Auckland University of Technology
Amanda Spry. RMIT University
Joya Kemper, University of Auckland

Historically, brands have not engaged in social and political conversations for fear of potentially alienating customers. But an increasingly ethically-aware population, who are now more “woke” than ever before, may both require and drive organizations to speak out on socio-political issues. However, as brands engage in more corporate social activism, motives underpinning this activity and its ethical implications are increasingly scrutinized. Such ethical implications are related to topic sensitivity (i.e., appropriation) and whether there is a place for corporations to get involved. In addition, questions remain about appropriate implementation. Since many questions remain unanswered about the implications of organizational involvement in socio-political issues, this conceptual piece explores the ethical dimensions of a brand’s involvement in such sensitive and controversial issues.

Macro-Level Teaching of Consumer Behavior through Social Marketing

As macromarketers, we not only “seek knowledge to improve marketing strategies and policies that affect social welfare” (Fisk 1981, 3), but also to inspire the next generation who will continue the tradition and confront the social issues of tomorrow. With most business curricula and textbooks based in a micro and managerial paradigm, teaching from a macro-level perspective requires ingenuity. Students and sometimes other faculty members need to be convinced that courses can be connected to macro-level issues of social welfare. There is a continual need for a historic and innovative approach in developing pedagogical tools to teach macromarketing (Shapiro 2012). In this work, I aim to share how I have used social marketing as a bridge to teach Consumer Behavior classes from a macro level.

In many business schools, Consumer Behavior is one of the elective courses that must be offered each year. In one common textbook, consumer behavior is defined as “the study of the processes involved when individuals or groups select, purchase, use, or dispose of products, services, ideas, or experiences to satisfy needs and desires” (Solomon 2015). The material focuses on the internal and external influences on consumer behavior, where the individual and groups are the typical units of analysis. There is very little attention given to the outcomes of such processes (perhaps one chapter on “social well-being”), and even less about the macro-level outcomes for societal welfare.

However, with the eyes of a macromarketer, consumer behavior is a topic ripe with possibilities for a higher level of analysis. “The word macromarketing implies that we care about the consequences of large marketing systems on large social issues” (Fisk 1981, 3). The individuals and groups and processes of consumer behavior are of course important components of marketing systems, with enormous bearing on large social issues. Many of macromarketing’s major themes such as externalities and their impacts, quality-of-life, sustainability and consumption (Shapiro 2012) are in part results of the aggregate behaviors of consumers. Therefore, one of the points of connection that is most clearly communicable to
students is that consumer behavior has a macro-level impact on society and large social issues (e.g. the disposal of products has an environmental impact).

Social marketing is one bridge for how to apply the principles and skills taught in Consumer Behavior to larger social issues. Social marketing is “the application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programs designed to influence the voluntary behavior of target audiences in order to improve their personal welfare and that of their society” (Andreasen 1995, 7). This definition includes the influencing of behavior of target audiences (squarely in the domain of consumer behavior) and societal welfare (a major concern of macromarketing).

I aim to contribute to the collaboration about macromarketing pedagogy by discussing how I use social marketing as a bridge between consumer behavior and macromarketing. I begin the course by asking students to write a personal introduction of themselves, including what the societal issues are that most concern them. As I introduce myself, and throughout the course, I discuss the social issues that are a concern for me personally, providing an opportunity to discuss my work as a macromarketer. I state that one of my course goals is to inspire the students to be better citizens and repeatedly discuss how we can view every topic from a managerial or consumer/societal point of view. The course syllabus states, “I hope that in taking this course you will become a more thoughtful and empowered future marketing manager, policy maker, citizen, and consumer.” All of these are an effort to raise students’ level of thinking—from each course topic to their career and life goals—to the societal level.

The core of the course is a term project in which students pick a social issue of their choice, collect data, and complete a social marketing plan for how to deal with these systemic challenges. The social marketing project has many similarities to the experiential learning projects described by Radford, Hunt, and Andrus (2015). In the syllabus, I introduce the project in this way: “While the course material can be applied in different ways, this project will be focused on influencing consumer behavior on a social issue. Kotler and Zaltman (1971) introduced the term ‘social marketing’ as the use of marketing skills to help develop current social action efforts into more effectively designed and communicated programs that will elicit desired audience response.” Students begin by collecting secondary data to understand the scope of the social issue and how these “controversies” have been handled to date (Shapiro 2008). They collect primary consumer data through in-depth interviews, observations, or surveys. Based on the analysis of the data, they create and present a social marketing plan.

There have been challenges in stretching the students to think on a more macro-level, but overall there have been favorable outcomes. The students have been more invested in the data collection and recommendations because they are able to select the social issue they most care about. The personal interviews conducted stretch students to understand the complexity of the underlying reasons for the socially destructive behaviors and appreciate the multi-faceted reasons why the problems persist. When the students listen to and evaluate each other’s presentations at the end of the semester there is greater interest because the topics are of broad significance.

In the most recent semester I offered this project in Consumer Behavior, I was amazed to see how the students were genuinely inspired and empowered when tragedy struck our campus. Within two weeks there were two deaths on our campus: one a suicide and one a student struck by a university-owned work vehicle on a notoriously dangerous walkway on campus. These tragedies evoked deep sadness and outrage. Two separate groups of students from our class formed voluntarily to use the same systems-level thinking and analysis skills to confront both of these problems. The students were brought face-to-face with the systemic societal problems of mental illness and physical safety. I can say that as a macromarketer I am satisfied that my
Consumer Behavior students are grappling with major issues of societal welfare rather than just micro-level questions like product placement or recall of brands.

In my presentation, I hope to make a contribution to the collaborative effort to connect macromarketing with the various business courses that we teach. I intend to show the theoretical links between consumer behavior, social marketing, and macromarketing. I also want to share the specifics of how I have implemented this theoretical connection through the different components of the course, including a social marketing-based term project. Our teaching is one of the most satisfying and powerful ways that we are “Mobilizing Action to Catalyze Real rocking Outcomes.”

References


Darks Sides of Alternative Foods Markets
Forrest Watson, Middle East Technical University, Turkey
Ahmet Ekici, Bilkent University, Turkey

With an obesity rate of almost one-third, Turkey is now the most obese nation in Europe (WHO 2018). As household incomes have increased, the obesity rate in Turkey has doubled since 1990. Many factors such as urbanization, low education levels, low rates of physical exercise, and the increased consumption of low-quality processed food have contributed to the spike in Turkey’s obesity.

In the face of the increasing consumption of processed foods, alternative food networks (AFNs) are a way that some Turkish consumers are trying to improve the quality of their food intake. AFNs are emerging networks of producers, consumers, and other actors that embody alternatives to the more standardized industrial mode of food supply (Murdoch, Marsden, and Banks 2000; Watts, Ilbery, and Maye 2005). Such networks are a way that urban consumers are able to access more natural and less-processed foods. The spread of AFNs are a way consumers can improve their food behavior and consumption, with important implications for the fight against the global obesity epidemic.

Macromarketers, concerned with the functioning and outcomes of marketing systems (Layton 2007), are interested in alternative networks as they may compensate for some of the drawbacks of predominant marketing systems in contributing to societal well-being and sustainability (Layton 2009; Mittelstaedt et al. 2014). The rising rate of obesity is an important example of the dangers in a traditional marketing system that is driven by efficiency and profitability. The commitment of AFNs to the social, economic, and environmental dimensions of food production, distribution, and consumption (Jarosz 2008) is a different foundation for a marketing system.

However, the spread of AFNs are not problem-free. In this research, we evaluate the benefits and dark sides of alternative networks. While AFNs might better provision healthy food, they may lead to other unintended outcomes. Well-being and ill-being outcomes may be present simultaneously (Ekici et al. 2018), and both need to be carefully considered. In recognizing the unintended outcomes, stakeholders can better prepare in how to mitigate them, defend AFNs to critics, and possibly even consider hybrid models that draw on the strengths of other types of economies. If researchers deal not only with AFNs’ positive sides, but also their negative (i.e. dark side) aspects, the potential of AFN’s in fighting obesity in Turkey and in the world can be better realized.

An exploration of the dark sides of AFNs was part of an ongoing case study of Miss Silk’s Farm (MSF), one of the most successful AFNs to recently emerge in Turkey against a backdrop of urbanization, the decline of local farming, and the related increase in obesity (Aydin 2010; Balaban 2012). The founder, Pinar Kaftancioglu saw an opportunity to provide employment for the villagers by sending food to friends and others referred by her friends in Turkey’s large cities. Clients place orders online, and then MSF fills boxes and ships them to customers’ doorsteps using a commercial cargo company. Approximately 2,000 large boxes are sent out weekly. MSF employs about 100 people year-round, most of them women from the surrounding villages. These employees receive generous monthly salaries, which is extremely rare for villagers accustomed to unpaid labor. Customers pay through bank transfers, often times well after the food is delivered, deducting for any unsatisfactory products.

The founder is outspoken against the increased consumption of processed food throughout Turkey and sees her AFN as a way to stem the tide and improve the health of Turkish consumers. The value proposition to the urban customers is high-quality natural and
traditionally grown and prepared foods. The customers are willing to pay two to three times more than typical supermarket prices for the foods they believe to be healthier. Customers vary in their motivations, but many are motivated to provide employment for village women as well as support an alternative form of agriculture and provisioning that benefits the producers and environment.

Our research into this AFN was multi-method, collecting data from semi-structured interviews, observations, and written, visual, and online documents. We recorded and transcribed over 35 hours of recorded interviews with the owner, consumers, MSF employees, and people in the producing community. We conducted follow-up interviews with the different actors to understand more of the dark sides. Through the extensive data collection and analysis of this AFN, we discovered five types of dark sides: Disappointment of others not meeting their part of the commitments; Disappointment of the shared commitments not leading to the expected outcome; Burnout from trying to invest in shared commitments; Guilt from adjusting shared commitments; Division from those outside the shared commitments if bonding is overemphasized at the expense of bridging social capital. While the food delivered through the AFN may be healthier, there are social drawbacks that should be considered to increase the potential of AFNs to contribute to food well-being within a society. We believe MSF is a successful AFN model, but that it still has drawbacks that should be considered.

Macromarketers have been advised to provide a better understanding of how marketing systems work and don’t work for people in societies (Layton 2007; Peterson 2016). AFNs are a strong example of the alternative to the predominant capitalist system. Based on our extensive research of this AFN, we believe that obesity can be mitigated by involvement in AFNs. Customers consume healthier, less-processed food. They have a greater understanding of what they are eating and who made it. We conclude that AFNs hold promise for connecting consumers with more natural foods embedded with social meaning.

However, the dark sides of AFNs should also be considered. As such, we present qualitative data of when the beneficiaries of MSF experienced several dark sides. While much less prominent than the well-being outcomes, the dark sides provide a cautionary word of what AFNs should avoid in order to grow in their importance in improving consumer’s health in developing countries like Turkey. Our conference presentation will also offer recommendations to guard against the vulnerabilities of AFNs for their continued growth and impact. For example, we suggest that owners and participants of AFNs show restraint in their involvement in order to avoid burnout and that the network remains open enough so that if participants leave they are not burdened by guilt. The detailed analyses will be presented at the conference.

References


Prohibitions, Boycotts, and Resisting the Green Dragon: Right-Wing Anti-Consumption in America

Terrence H. Witkowski, Department of Marketing, California State University, Long Beach

Abstract
Most anti-consumption scholarship has focused on left-wing movements in societies past and present. This paper develops a counternarrative that explores strains of anti-consumption thought and action driven by right-wing interests. The research investigates prohibition movements, boycotts of media content, brands, and companies, and, most recently, resistance to sustainable consumption, also known to some opponents as the “green dragon.” The different aims, executions, and societal impacts of these anti-consumption efforts in the American experience are analyzed. Implications for the domain of anti-consumption research and potential global study are discussed.

Keywords: Anti-consumption, right-wing, prohibition, boycotts, sustainable consumption, green dragon, consumption history

Introduction
Anti-consumption movements have frequently opposed conservative institutions in society. In late nineteenth and early twentieth century America, for example, labor unions organized thousands of small-scale boycotts that targeted businesses seen as mistreating workers and gouging consumers (Glickman 2009). Around 1900 when cities and states in the South passed new Jim Crow laws imposing racial segregation on streetcars, African Americans refused to patronize the trolley companies (Meir and Rudwick 1969, 1973). Though these protests proved unsuccessful at the time, they served as a template for later boycotts motivated by blatant racial discrimination. Starting in Chicago in 1929, and spreading to cities across the North until reaching Harlem in 1934, blacks picketed retail stores demanding greater employment opportunities under campaign taglines such as “Don’t Buy Where You Can’t Work” (Cohen 2003, p. 44; Frank 1999; Greenberg 1999). In the 1950s and 1960s, the burgeoning civil rights movement boycotted buses and staged sit-ins protesting segregated sites of consumption (Friedman 1999).

Other notable challenges to conservative interests in the U.S. have included the California grape boycott from 1965 to 1970 spearheaded by the now iconic labor leader and civil rights activist Cesar Chavez (1927-1993) who lambasted grape growers for oppressing immigrant Mexican farmworkers. From 1977 to 1980 gay rights activists announced boycotts of Florida orange juice as a tactic in their battle with that state’s religious right led by the homophobic beauty queen, pop singer, and Florida Citrus Commission spokeswoman, Anita Bryant. The rise of environmental and animal rights movements in the 1970s eventually led to all sorts of anti-consumption activities, such as voluntary simplicity, avoidance of products tested on animals, and veganism and vegetarianism (see, e.g., Etzioni 1998; Singer 2009; Witkowski 2010). Much anti-consumption activism in the twenty-first century, in its questioning of capitalism, corporations, and materialism, has an ideological foundation in the political left (Kozinets 2002; Kozinets and Handelman 2004).

The purpose of this paper is to introduce a counternarrative where right-wing interests drive different strains of anti-consumption thought and public action. The term “right wing” generally refers to “the conservative or reactionary section of a political party or system” (Oxford Dictionaries 2018). Its precise meaning will vary across societies and over time, but right-wing politics typically support traditional racial, gender, and economic hierarchies and
inequalities, as well as various forms of religious morality and fundamentalism opposed to women’s rights, tolerance of homosexuality, and other expressions of progressive social values. Though right-wing anti-consumption has had a very long global history – sumptuary laws enforcing social class distinctions date back to ancient Greece, Rome, and China – this research will be limited to events in America from the 1600s to the present. In the American context, the right-wing worldview has favored whites, men, the wealthy, and Protestants, and has opposed abortion, welfare, immigration, and gay and lesbian rights. Since the late 1960s, these positions have been championed most often by the Republican Party and their allies among evangelical Christians. Extreme right-wing zealots in the white power movement have made targets of Jews, Muslims, communists, and the government itself (Belew 2018).

Three different manifestations of right-wing anti-consumption will be investigated: 1) prohibition movements, 2) boycotts of media content, brands, and companies, and 3) resistance to sustainable consumption. Prohibition movements have been around the longest and have restricted consumption considered immoral and unhealthful. After a quick recounting of some colonial era sumptuary decrees, the paper will describe the political evolution of alcohol and cannabis prohibitions from the late nineteenth into the twenty-first century. Calls for boycotts of motion pictures by religious conservatives drew national attention in the 1930s and again in the 1980s and 1990s when criticism turned toward television programs and sponsors. Right-wing opposition to companies has ranged from boycotts of firms with gay-friendly customer and employment policies to the rejection of brands daring to leverage progressive political and social stances. Resistance to sustainable consumption, a relatively recent phenomenon, has been encouraged by the fossil fuel industry, many Republican politicians, and the extreme religious right where the term “resisting the green dragon” originated. This messaging appears to have resonated in America, particularly among young, white males who have been acting out hostility to the natural environment and to electric vehicles. These histories will be brief, but detailed enough to identify a range of practices and underlying thought that comprise right-wing anti-consumption. The concluding section will provide an assessment of the three cases, consider their societal impacts, and suggest avenues for further research.

This study approaches right-wing anti-consumption as a multifaceted macro phenomenon with a temporal dimension that can have significant market and societal implications. Unlike much work in anti-consumption, where the social-psychology of individual actors is of prime interest (see, e.g. Chazidakis and Lee 2013; Klein, Smith, and John 2004; Sandikci and Ekici 2009; Stanley, Wilson, and Milfont 2017), the present research focuses upon organized political movements, actual events, and social outcomes over time. Right-wing anti-consumption discourses and associated public-sphere activities have affected product classes, specific brands, companies, communities, and individuals. As will be shown, these impacts have been considerable and long lasting in some cases and negligible, transient, or indeterminate in others. The following historical narratives are based upon a combination of primary and secondary data sources with the latter relatively more important when recounting events occurring further back in time. Primary sources mostly consist of contemporaneous academic articles, media mentions, and participant web pages. Secondary sources come from the literature written at a later date.

Prohibition Movements

American anti-consumption in the form of a prohibition can be traced to the seventeenth-century when, in an effort to forestall impious materialism and, more importantly, maintain class distinctions, New England’s Puritan colonies enacted sumptuary laws regulating clothing and hairstyle choices, especially among the less affluent (Hollander 1984). A Massachusetts law of 1651 specified a ten shilling penalty for either men or women with a net worth under
£200 who wore gold or silver buttons or lace, bone lace above two shillings a yard, and silk hoods or scarves. Enforcement was sporadic, but not uncommon. For example, the authorities charged an apparently incorrigible Hannah Westcarr with the crime of wearing silk in 1673 and again in 1675 and 1677. In 1676, the second year of King Philip’s War, a deadly conflict between settlers and New England’s remaining Indians, 38 maids and wives and 30 young men were accused of wearing silk, flaunting manners, and displaying other extravagances (Ulrich 2001, p. 125).

In a similar spirit, the Massachusetts Bay General Court banned all Christmas festivities in 1659 and penalized scofflaws with fines. Christmas was celebrated much differently at the time and the ban appeared aimed at the rowdy public behavior of the lower classes. This prohibition remained in effect until 1681, when it was revoked under pressure from English authorities unhappy with stern Puritan morality that had been repudiated by the Restoration twenty years earlier (Restad 1995). Vestiges of strict Christian prohibitionism, such as state and local “blue laws” banning shopping activities on the Sabbath, persisted, but attitudes eventually changed and most Sunday laws have been repealed. Other sweeping restrictions, such as on prostitution, child pornography, and casino gambling (Humphreys 2010), may coincide with religious orthodoxy and find strong support among believers, but also may embody more progressive motivations.

In the early nineteenth century a national temperance movement began to emerge. Alcohol consumption had reached disturbingly high levels by the 1830s and people were rightfully concerned about its abuse (Rorabaugh 1979). By the end of the century, temperance had morphed into a crusade to prohibit drinking entirely and to crush saloons in the process. Prohibitionists argued that too many working-class men wasted their earnings in these bars. This movement had progressive impulses in its desire to protect families and drew strong support from women. Its proponents even favored women’s suffrage based on the assumption that enfranchised female voters would support prohibition. The Women’s Christian Temperance Union was formed in 1874 and the even more politically astute Anti-Saloon League in 1893. Anti-alcohol sentiments flooded the mass media and more and more states and localities banned alcohol. With the ratification of the 18th Amendment to the U.S. Constitution along with its enabling legislation, the Volstead Act, federal law prohibited the manufacture, sales, and transportation of intoxicating beverages starting on January 16, 1920. Although the Amendment did not explicitly ban consumption, possession, and production for personal use, its intent was to shut down the market and make obtaining alcohol as difficult as possible.

Right-wing influences on the alcohol prohibition crusade eventually overshadowed its progressive impulses. Prohibition was much more popular in conservative rural areas and small towns in the South and Midwest than in the rapidly expanding cities (Gusfield 1963). Its supporters tended to be native-born, white Protestants who showed disdain toward ethnic Germans and Catholic Irish, not to mention the newly arrived immigrants from southern and eastern Europe. The major breweries that had gone national, such as Anheuser-Busch, Blatz, Miller, Pabst, Piels, and Schlitz, were all owned and operated by German-Americans. These companies gave considerable promotional support to saloons, but their ethnic links became a liability during World War I when public opinion turned quite hostile to Germany and Germans. The Ku Klux Klan, which flourished in the 1920s spouting hatred of blacks, Catholics, and Jews, ardently supported Prohibition (Okrent 2010). These divides became exacerbated as the decade progressed, especially since thirsty urban and ethnic consumers flaunted the law and frustrated the goals of its conservative supporters. The November 1928 election resulted in large dry majorities in both the U.S. Senate and the House of Representatives. They passed the harsh Jones-Stalker Act in 1929, which turned Volstead Act violations from misdemeanors into felonies, but this vengeful law resulted in countervailing
political organization among wets that the press covered favorably (Okrent 2010). After the onset of the Great Depression, Republicans lost elections in 1930 and 1932 and were replaced by alcohol-friendly Democrats. In 1933, the 21st Amendment repealed Prohibition at the federal level, but it remained in force in some states until 1966 when Mississippi finally ended its ban. Today, hundreds of counties and municipalities still remain dry (Keyes 2015).

Similar to alcohol, the movement to prohibit cannabis consumption had diverse political support initially. Turn of the century progressives concerned with moral issues added cannabis to their regulatory wish list and began to create public sentiment against the drug until, in 1914, the New York City Sanitary Laws prohibited cannabis. States began to follow suit and by 1933 a total of 33 had banned its use (Bonnie and Whitebread 1974). By this time, however, conservative interests were leading the charge. The newspapers controlled by William Randolph Hearst (1863-1951), a notorious racist whose journalism for several decades had railed against the Asian “yellow peril” and had bashed Japanese and Japanese Americans (Frank 1999, 2017), ran stories in the 1930s associating black, Mexican, and West Indian pot users with heinous criminal activities. These wicked meanings were transferred to cannabis and its consumption. Critics called the herb marijuana or marihuana to emphasize its Mexican connection. Commissioner Harry J. Anslinger of the Federal Bureau of Narcotics (established in 1930), who was for many years a leading anti-cannabis crusader, clearly expressed his sentiments in a rant from 1936:

There are 100,000 total marijuana smokers in the U.S., and most are Negroes, Hispanics, Filipinos and entertainers. Their Satanic music, jazz and swing result from marijuana use. This marijuana causes white women to seek sexual relations with Negroes, entertainers and any others (cited in Wing 2014).

Given that cannabis smoking was perceived to be prevalent amongst Mexican and African Americans in an era of extreme racial prejudice, it should come as no surprise that dominant whites, their political representatives, and law enforcement interests would opt for its criminalization. Apparently, they had learned little from the failure of Prohibition a few years earlier. Anti-cannabis campaigning, which included preposterous Hearst newspaper headlines – one from 1936 claimed “Marihuana Makes Fiends of Boys in 30 Days; Hasheesh Goads Users to Blood-Lust” – and the risibly inflammatory film, Reefer Madness (1936), resulted in the Marihuana Tax Act of 1937, the federal law that effectively made possession itself, as well as distribution, illegal throughout the U.S. The general public did not know much about the drug and little debate and virtually no scientific evidence accompanied new legislation (Bonnie and Whitebread 1974). One film, Assassin of Youth (1937) took its name from an article Anslinger published in The American Magazine in July 1937 and reprinted in Reader’s Digest in 1938. During the 1950s, pulp fiction paperbacks with titles like The Marijuana Mob (1952), Reefer Club (1953), and Reefer Girl (1953), conveyed a form of cautionary education about drugs, but their highly sexualized covers may have induced some readers to experiment (Gertz 2008). New laws in the 1950s imposed even harsher punishments for possession.

In the 1960s cannabis acquired an army of new users and set of politically charged meanings that further inflamed right-wing opinion. It became a popular recreational drug among young people, counter-culture types, and Vietnam War protesters. Smoking pot became a symbol of political protest and opposition to the establishment. In retaliation, the Federal Controlled Substances Act of 1970 classified marijuana as a Schedule I drug with no medical benefits, thus equating it with heroin (Pacula et al. 2002). Scientifically dubious, this law clearly aimed to punish users for their presumably left-wing views and lifestyles. A decades long crusade to destigmatize and decriminalize cannabis ensued (Lee 2012). The passage in 1996 of California’s Proposition 215, the first successful medical cannabis initiative in the U.S., helped
to shift public opinion and, as of May 2019, 33 states have some form of medical access law and ten states and the District of Columbia have legalized recreational (adult use) cannabis sales. Increasingly on the defensive, right-wing prohibitionists continue to lash out against the weed. Elements of the alcohol lobby fear the loss of business to another legal intoxicant; pharmaceutical companies worry about an alternative pain medication; racist and reactionary police resent limits on the scope of their authority; and prison guards unions dread a decrease of non-violent drug offenders who have created their jobs by filling jail cells (Paul 2019). Many states and the federal government still arrest and incarcerate people caught with cannabis. In 2017, there were a total of 659,700 marijuana arrests, 599,282 for possession and 60,418 for manufacturing or sales (Angell 2018). A flurry of op-ed pieces in January 2019 promoted a new anti-marijuana book, Tell Your Children: The Truth About Marijuana, Mental Illness and Violence (Berenson 2019). Such works have been a cottage industry for many years. Public opinion polls show that support for legalization remains weakest among Republicans and white evangelical Christians, two reliably conservative groups (Hartig and Geiger 2018; McCarthy 2018).

**Boycotts of Media, Brands, and Companies**

The suppression of media content on conservative moral and political grounds goes far back into American history. In 1650 Puritan authorities in Massachusetts confiscated copies of The Meritorious Price of Our Redemption written by prominent layman, William Pynchon (1590-1662), and printed in London. Seen as heretical on theological grounds, as well as not being sufficiently subservient to the opinions of leading clergy, the pamphlets were promptly burned, the first in a long saga of American book banning (Crown 2015). Two centuries later, an 1873 federal Law named after its chief proponent, Anthony Comstock (1844-1915), the founder of the New York Society for the Suppression of Vice, prohibited “Trade in, and Circulation of, Obscene Literature and Articles of Immoral Use.” Such censorship of consumption relies on the deployment of state power.

Media boycotts, in contrast, leverage the marketplace rather than government dictates to reduce and redirect consumption. This section’s survey begins in 1933 with the formation of the Legion of Decency (aka Catholic Legion of Decency) and its call for movie boycotts (Friedman 1999). For a number of years religious leaders had protested what they saw as brazen indecency in the popular cinema and by the early 1930s some films had become quite racy and violent by the standards of the day. Rather loosely organized, the Legion asked Catholic parishioners to sign a pledge to "remain away from all motion pictures except those which do not offend decency and Christian morality" (cited in Time 1934, p. 39; see also Friedman 1999). In theory, watching a condemned screening could be a mortal sin. The Legion aimed to enlist half of the then 20 million U.S. Catholics along with other like-minded people and by 1934 claimed to have two million members. Fearing that this boycott could reduce audiences and invite new federal laws (Schallert 1934), the studios censored themselves through the Motion Picture Production Code, also known as the “Hays Code.” William H. Hays (1879-1954) was a Republican politician who represented the industry as Chairman of the Motion Pictures Producers and Distributors of America. Early television also conformed to the Hays Code. Among other curious standards, married couples could only be shown sleeping in twin beds. By the late 1960s, however, the Production Code had been abandoned and the Legion had lost its battle.

As broadcasting in the 1970s began reflecting changing sexual and cultural mores, a new generation of morality cops became alarmed. In 1977 the Reverend Donald Wildmon, a minister of the United Methodist Church from Tupelo, Mississippi, formed the National Federation for Decency – renamed the American Family Association (AFA) in 1988 – to
combat excessive sex, violence, and coarseness on television. Jiggle shows and ostensibly immoral comedies, like Charlie’s Angels and Three’s Company, annoyed this United Methodist minister. In 1980, he teamed up with Jerry Falwell (1933–2007), a Southern Baptist pastor, televangelist, and conservative political commentator, to form a new organization called the Coalition for Better Television (CBTV). Wildmon instructed CBTV volunteers to monitor prime-time shows and threatened boycotts of companies advertising on offensive programs. Procter & Gamble and other major corporations capitulated to this pressure in 1981 and withdrew advertising from some shows. Wildmon’s group next turned on the NBC network and its owner, RCA, but boycotts carried out in 1982 appear to have been ineffective (Friedman 1999). Wildmon and Falwell had a falling out and CBTV disbanded in 1982, but the AFA continued to threaten and carry out boycotts against a number of companies from the 1980s up to the present (AFA 2019).

One of the better-known campaigns of the religious right targeted the Walt Disney Company in 1996 for its “gay friendly” policies toward employees and theme park visitors and for broadcasting, on the Disney-owned ABC network, the comedy series Ellen (1994–1998) whose eponymous lead character, multi-talented Ellen DeGeneres, came out as a lesbian. The Southern Baptist Conference joined the AFA in urging a Disney boycott (Friedman 1999). Twenty years later, in April 2016, the AFA, now led by Donald’s son Tim Wildmon, promoted a boycott against Target for its policy of allowing transgender team members (i.e. workers) and guests (i.e. customers) to use restrooms and fitting rooms that correspond with their gender identity (AFA 2016). Perhaps as a backlash against the 2015 Supreme Court decision legalizing gay marriage, not to mention the extensive media coverage of transgender people and issues, bathroom use became a hot button issue for right-wingers in 2016. Legislation in North Carolina and elsewhere restricting bathroom access to the sex recorded on a person’s birth certificate triggered retaliatory boycotts against these states from companies, private groups, some government bodies, and the LGBT community. At this writing, the AFA still encourages a boycott against Target (AFA 2018). The Southern Poverty Law Center has identified the AFA as a hate group, and Tim Wildmon as an extremist, because of rabid opposition to LGBT people (SPLC 2019).

Other recent calls for boycotts have implemented right-wing racial, patriotic, and gender concerns. Nike has been criticized for an ad campaign launched September 3, 2018 featuring former San Francisco 49er football quarterback, Colin Kaepernick, who in 2016 grabbed national attention when he took a knee during the pre-game playing of the Star-Spangled Banner. Kaepernick was protesting racial inequality and the murder of young black men by police, but conservatives insisted this was an insult to the American flag and to military personnel. The Nike print ad riffed on its “Just Do It” slogan by superimposing “Believe in something, even if it means sacrificing everything” on an extreme close-up of Kaepernick’s face. Social media became the vehicle for expressing outrage and calling for a boycott of Nike. Some customers even posted photos of their Nike apparel being burned or the logo being cut off. They were encouraged, naturally, by President Trump who tweeted disparaging remarks about Kaepernick and the NFL. The kneeling controversy may have been one reason, along with concerns over player on-field head injuries and off-field misbehavior, for the league’s television ratings to decline over both the 2016 and 2017 seasons. They rose slightly in 2018. Nike sales soared 31 percent immediately after the ad’s release and gained ten percent over its entire second quarter ending November 30, 2018 (Youn 2018).

On January 13, 2019, Procter & Gamble’s Gillette brand took on the issue of toxic masculinity in a nearly two-minute-long video titled “The Best a Man Can Get.” It addressed bullying and sexual misbehavior among men and visualized how more enlightened males could combat these problems. A poll conducted January 15-16 by Morning Consult, an online survey
research firm, found that 61 percent of U.S. adults viewed the ad favorably vs. 17 percent who did not. Women showed more somewhat more approval than men (64 vs. 57 percent), but the biggest difference was between Democrats and Republicans (73 percent vs. 48 percent approval) (Piacenza 2019). Right-wing gadflies took this as an opportunity to renew their complaints about a “war against men” and quickly attacked the company. Meanwhile, men’s rights advocates vowed on social media to boycott the brand (Baggs 2019; Hanbury 2019; Stanley-Becker 2019). One tweet on January 15 featured a photo of a razor in a toilet bowl under the words “Goodbye Gillette. Hello Schick #GilletteAd.” The longer-term impact of such blowback on Gillette sales remains to be seen.

Resistance to Sustainable Consumption

Resistance to sustainable consumption has emerged from a confluence of forces. Seeing efforts to combat global warming as a major economic threat, the fossil fuel industry has deployed its considerable financial resources to undermine climate science and underwrite right-wing politicians (Oreskes and Conway 2010). Koch Industries, a multinational petroleum and chemical company based in Wichita, Kansas, has lobbied against Corporate Average Fuel Economy (CAFE) standards and electric vehicle tax credits, while working to preserve the oil subsidies it receives. Efforts to promote sustainable consumption have invited anti-environmental contrariness among right-wing interests. In 2007, for instance, the World Wildlife Fund launched the “Earth Hour,” an annual turning off of electricity for 60 minutes intended to call awareness to sustainability and build the environmental movement. In response, the Competitive Enterprise Institute, a libertarian outfit in Washington D.C., promoted a “Human Achievement Hour” that encouraged greater energy consumption to celebrate progress and simultaneously expose the pointlessness of Earth Hour (CEI 2018; Earth Hour 2019). President Donald Trump, a confirmed global warming denier, along with an increasingly reactionary Republican Party have championed coal and other fossil fuels and have weakened the regulatory oversight of the U.S. Environmental Protection Agency.

The religious right, which draws much of its support from white evangelical Protestants and some conservative Roman Catholics, has joined the efforts of secular conservatives to undermine environmentally friendly consumption. Though a respectable minority of evangelicals have endorsed sustainable practices and a theology of environmental stewardship, their proportion among co-religionists remains smaller than the share of greens among black and mainline Protestants, Catholics, Jews, other faiths, and non-believers (Jones, Cox, and Navarro-Rivera 2014). Catholic social teachings are quite progressive on environmental issues, but not all clergy and parishioners share progressive papal views. Anti-environmental opinion has been particularly strong over the past few decades among white evangelicals and Southern Baptists. One group in particular, the Cornwall Alliance, has railed against environmentalism with the slogan “Resisting the Green Dragon” and a series of YouTube videos produced in 2010 (Amos, Spears, and Pentina 2016). This team has accused environmentalists of being atheistic radical socialists trying to tear down America and its wonderful capitalistic system. The series appears to have targeted conservative evangelical congregations with a goal of “maintaining environmental skepticism in general, and climate denialism in particular, among a constituency already inclined to such skepticism” (Zeleha and Szasz 2015, p. 27). Many members of this community subscribe to an “end times” theology where divine judgement will destroy the planet and dispatch its inhabitants to heaven or to hell. In the minds of believers, climate change and environmental deterioration can be dismissed as insignificant problems given that biblical Armageddon is nigh (Zeleha and Szasz 2015).

Gender has played an important role in not consuming sustainably. Some American males have avoided forms of consumption they perceive as having feminine associations. By the
1990s sustainability researchers had established a link between gender and environmentally friendly attitudes, choices, and behaviors. Women cared more about the environment. They exhibited more overall concern than men, and especially when greater risk was involved (e.g. from a nuclear reactor accident), and when local environmental issues were at stake (Davidson and Freudenburg 1996). In December 2014 an advocacy law firm conducted a nationwide online poll of 1005 adults on environmental issues (Tiller, LLC 2014). They found that American women, compared to men, were more likely to show concern about increasing global warming (64 percent vs. 52 percent), to look for opportunities to go green (87 percent vs. 78 percent), and to feel guilty about not leading an eco-friendlier lifestyle (53 percent vs. 42 percent). Part of these differences could be explained by political motives in that American men tilt increasingly toward the Republican right and so might deny global warming for ideological reasons. In 2015 and 2016, Brough and his colleagues (Brough et al. 2016) conducted a series of studies largely using American undergraduates as subjects. The authors found that both males and females associated greenness with femininity. Through an experimental manipulation of gender cues, they also established that threats to masculinity resulted in men being less likely to choose green products. This last finding was consistent with the overcompensation hypothesis, which posits that men react to gender insecurities by demonstrating their masculinity in extreme ways (Willer et al. 2013). This response may include highly gendered forms of consumer behavior known as male compensatory consumption (Holt and Thompson 2004). Resisting sustainability may be one such outcome.

During the presidency of Barack Obama a few men created a new anti-sustainable consumption subculture. Mostly rural, youngish, and white, these “coal rollers” retrofitted their diesel pick-up trucks so that they could spew out clouds of black smoke at the flick of a switch in case a fuel-efficient Toyota Prius or an even greener bicycle rider happened to appear nearby. Some even stuck “Prius Repellent” stickers on their bumpers (Tabuchi 2016). As David Weigel (2014) observed, “The motivation for political coal rolling is roughly the same one that gets people buying guns and ammo after mass shootings. The expectation, every time, is that liberals will capitalize on the shootings to ban guns, so it’s time to stock up.” Since liberals were perceived to drive Priuses, these cars became the enemy. The number of coal rollers is unknown, but likely smaller than the media coverage suggested. Several states, including conservative Utah and Texas, have laws banning this activity.

In late 2018 a new twist emerged with reports from North Carolina and other places about white men parking their gasoline-powered pick-up trucks in front of Tesla supercharging stations in order to block electric vehicles from topping off. In one incident at a Sheetz convenience store in Hickory, North Carolina, truckers were reported to have chanted “F” Tesla” (Rapier 2018). This form of obstruction is known as ICEing where ICE denotes internal combustion engine. Since about 2016, other reports have chronicled vandalism of charging plugs and cables at Tesla stations. These acts may be just the most visible demonstrations of more broadly held attitudes among American men and even some women proudly hostile to environmentalism. Ironically, Tesla is an American company with factories in Fremont, California, Reno, Nevada, and Buffalo, New York.

**Discussion and Conclusions**

The three histories illustrate different types of right-wing anti-consumption in America. Prohibitions have involved government action through the passage of laws and their enforcement. Applied to entire product classes, and either absolute or class and time specific like sumptuary and blue laws, prohibitions can curtail markets and reduce consumption assuming widespread public acceptance and depending upon the level of state coercion applied. Media boycotts, in contrast, have addressed specific creative productions, brands, and/or
companies. They implicitly redirect consumption to alternative offerings and depend upon market forces to succeed in pressuring content creators and sponsors to change their policies. Boycott organizers have ranged from large institutions (Roman Catholic Church) to smaller but ongoing groups (American Family Association) to leaderless individual posts on social media. Resistance to sustainable consumption is an aggressively promoted ideology that has served conservative economic, political, and theological interests. Some forms of resisting the green dragon have been directed at specific product types (electric vehicles) and brands (Prius, Tesla). These public displays appear to be an entirely white male preoccupation.

Right-wing anti-consumption in America has achieved considerable success. The passage of the 18th Amendment and the ensuing thirteen years of Prohibition constituted a major political triumph after decades of grassroots mobilization. Alcohol consumption initially fell to 30 percent of the immediate pre-Prohibition level, but within a few years drinking returned to 60-70 percent of the baseline and continued to rise until Repeal in 1933 (Miron and Zweibel 1991). Backed by the extensive resources of federal, state, and local law enforcement, cannabis prohibitions at one or more levels have been in force for over a century. Their effectiveness in reducing consumption is hard to determine. One would assume strict laws have kept some people from imbibing, but all the negative, often ludicrous publicity may have aroused curiosity and incited rebellion. So far no credible research has been found documenting that legalization of medical and recreational marijuana at the state level has been associated with a big upsurge in its consumption. Defiance of cannabis prohibition has been widespread and the economic and societal costs of implementing restrictive laws has been very high. Alcohol and other drug prohibitions have encouraged organized crime and have resulted in high rates of incarceration of black males, which in turn has devastated their families and communities.

Religiously and politically inspired boycotts of media and brands have garnered considerable publicity, but in practice their societal impacts have been relatively modest. The Legion of Decency achieved the most significant results. Its pressures induced serious film (Hays Code) and later television industry self-regulation that lasted for over thirty years. Whether the announced boycotts alone would have reduced box office receipts in the 1930s remains doubtful since criticism by the Legion might have attracted fans of the lurid and erotic. In the early 1980s, some major advertisers bowed to boycott threats by withdrawing support from a few television programs (Friedman 1999). Yet, despite the continuous venting of outrage by the religious right, sex and coarse language in the media are much more prevalent today than when Donald Wildmon first complained publicly about cheesy TV shows. Campaigns hostile to the LGBT community appear not to have not changed corporate policies very much. This should not be a revelation since the preponderance of American public opinion, particularly among youth, has moved rapidly toward LGBT acceptance (see, e.g. Gallup 2019). So far, Nike’s politically edgy advertising may have alienated some customers, but early sales results suggest it has gained the respect and patronage of many more. Nonetheless, boycotts can be successful in other ways. As Friedman (1999) explains, they can be value expressive, a therapeutic venting of frustrations, even if ineffectual in terms of changing behavior.

Overt demonstrations opposing environmentalism through conspicuous pollution, such as coal rolling and ICEing, appear to be sporadic and fringe acts, easily ridiculed. But less obvious forms of such anti-consumption may be widespread. Sales and market share data indicate that American consumers have developed strong attachments to less than fuel-efficient pick-up trucks and SUVs. Several factors may have shaped these preferences, but to some extent automotive purchasing decisions may have been influenced by an induced urge to stick it to pagan and politically correct environmentalists (especially those in California) and what some perceive to be their attitude of virtuous superiority. Right-wing organizers have been quite adept at stoking resentments and manipulating identity politics, especially among less-educated
white males, to serve larger economic and ideological interests. Thus, the persistent messaging that has dismissed and disparaged sustainable consumption may have had subtle, but long-term market and societal impact in America.

A common through line connecting these three historical examples of right-wing anti-consumption is the concern with, criticism of, and control over someone else’s consumer behavior. A few instances discussed above, such as small-scale boycotts of Nike and Gillette or aggressive coal rolling and ICEing, could be interpreted as personal statements about self-identity, but prohibition movements, organized attacks on the media, and anti-sustainable consumption propaganda mostly stigmatize the consumption of other persons. This dynamic has been underemphasized in the anti-consumption literature, whose contributors appear more absorbed by individual consumers, their personal lifestyle choices, and causes in opposition to the establishment. Not once does the review article by Chazidakis and Lee (2013) mention the terms right wing, prohibition, and conservative. The macro, historical evidence presented herein indicates that the domain of anti-consumption has been clearly much broader than the current body of left-leaning theory and research.

This essay has focused on anti-consumption in America, but similar examples of right-wing thought and action can be found globally, both in the past and at present. Sumptuary laws date to ancient times and today some societies take a notable interest in regulating female attire. For thousands of years Judaism, Islam, and other religious traditions have proscribed certain forms of food consumption as treif (non-Kosher in Yiddish) or haram in Arabic. Most secular societies have allowed alcohol and tobacco consumption, but in the twentieth century they banned cannabis and other drugs like the U.S. had done. The idea of resisting sustainable consumption, on the other hand, does not appear to be quite so universal. Compared to most other rich countries, American politics appear skewed to the right.

Right-wing boycotts have crossed national borders. The ominous April 1, 1933 boycott of Jewish businesses in Germany organized by the then recently empowered Nazis inspired similar antisemitic outbreaks in several other central European countries. One of the targets in Germany, F.W. Woolworth Co. GmbH, was a subsidiary of the American parent company. Following suit in 1938, the pro-fascist Roman Catholic priest and popular radio preacher, Father Charles E. Coughlin (1891-1979), promoted holding “Buy Christian” rallies around the U.S. (Holocaust Encyclopedia 2019a, 2019b). Throughout the Middle East, fundamentalist inspired boycotts of Danish products, particularly the brands of Arla Foods, started in September 2005 to protest cartoons depicting the Prophet Mohammad that had appeared in Jyllands-Posten (Abosag and Farah 2014). The worldwide scope of right-wing anti-consumption presents many research opportunities.

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Abstract

To achieve sustainable levels of consumption while maintaining or improving well-being, it is necessary to gain a better understanding of the complexity of consumption. Existing research models consumption as personality trait (materialism) or focuses on specific consumption types. The operationalisation of well-being is generally basic. This paper conceptualises the relationship between categories of consumption, based on consumer needs and well-being facets and presents a conceptual model. Preliminary results from a quantities study conducted in New Zealand will be presented at the conference.

Consumption is an essential part of people’s lives with the potential to greatly enhance – or reduce – individual well-being (Dittmar, Bond, Hurst, & Kasser 2014; Sirgy 2018; Van Boven & Gilovich 2003), and social and ecological well-being (Kilbourne, McDonagh, & Prothero 1997; Sheth, Sethia, & Srinivas 2011). It satisfies a variety of human needs, spanning from basic necessities like food and shelter, to social experiences, enabling the display of status or expertise in an area of life, or fostering personal growth (Maslow 1943, 1954). This research builds on need theory to study the relationship between categories of consumption and well-being facets (Diener 2009; Diener, Lucas, & Oishi 2018). Maslow’s taxonomy (Maslow 1943, 1954), the most succinct and best known need satisfaction model (Csikszentmihalyi 2000) provides a yardstick to categorize consumption. All levels of consumption including non-discretionary consumption, largely overlooked in existing research streams, is included.

Consumption should enhance peoples’ subjective Quality of Life and well-being, but studies from different research backgrounds reveal different and complex relationships between these two broad concepts. The three most prominent research streams exploring consumption and well-being model consumption either as material well-being, emphasize over-consumption by exploring the trait-like personal characteristic of materialism, or look at specific (types of) consumption:

Research that focuses on the link between material well-being, or related concepts like financial satisfaction or perceived economic well-being, generally finds a positive relationship between the perceived possibility to consume and Life Satisfaction or SWB (Sirgy 2018). Multi-dimensional models also reveal Satisfaction with Standard of Living to be a strong predictor of Life Satisfaction (Cummins et al. 2003; Ganglmair-Wooliscroft & Lawson 2011; International Wellbeing Group 2013). While this research stream supports the idea of money/income as an enabler of consumption, and subsequently an enabler of SWB (Howell & Hill 2009), the complexity of consumption is reduced and no details regarding patterns of consumption can be detected.

The most prominent research stream on consumption and well-being focuses on materialism defined as “the extent to which an individual believes that it is important to attain money, possessions, image, and status, relative to other aims in life“ (Kasser 2018, p. 821). Consumption is modelled as one facet; a personal disposition to (over-)consume, a belief that money can buy happiness – and more money could buy more happiness. An extensive meta-analysis by Dittmar, et al. (2014) containing over 250 samples found overwhelming evidence that when consumption is conceptualized as materialistic tendencies, it is negatively correlated with well-being and SWB.
Van Boven and Gilovich’s paper “To Do or to Have” (2003) marked the emergence of a third stream of research that explores the role of material versus experiential purchases and their influence on SWB - or, as authors within this research stream term it, ‘happiness’. Studies aim to counterbalance the restrictive (and negative) implications of materialism and explore how “particular purchases affect happiness” (Nicolao, Irwin, & Goodman 2009, p.188). Research consistently finds that experiential purchases have a stronger and more enduring impact on happiness and/or SWB than material purchases (Bhattacharjee & Mogilner 2013; Nicolao et al. 2009; Van Boven & Gilovich 2003), are more central to the self (Carter & Gilovich 2010; Gilovich, Kumar & Jampol 2015), encourage storytelling and foster social connections (Kumar & Gilovich 2015). A related research stream focuses on the motivation underlying types of consumption and finds that pro-social spending is stronger related to happiness (Aknin, et al. 2013; Caprariello & Reis 2013; Dunn, Aknin, & Norton 2008; Hill & Howell 2014).

Schmitt, Brakus & Zarantonello (2015) criticise this stream of research for omitting existing knowledge in consumer psychology and marketing (e.g. experimental marketing (Hirschman & Holbrook, 1982)) or brand experiences (e.g. brand communities (McAlexander, Schouten, & Koenig 2002)). Studies also focus on a specific range of spending (e.g. $50 to $300) that enables memorable experiences but might be not enough to capture important large material purchases, and – last but not least – question the false dichotomy between material and experiential purchases (Schmitt, et al 2015), as an experience is generally enabled, but not the core of what is purchased; for example, one purchases a meal at a restaurant, but does not ‘pay for’ the experience of a pleasant evening in good company.

None of these research streams emphasizes the complexity inherent in consumption and the role it plays in peoples’ life. Consumption is either operationalized as (highly abstract) personal evaluation of the ability to consume (e.g. Standard of Living), modelled as overall trait-like characteristic to over-consume (materialism), or focuses on one specific type of consumption (experiential purchases or pro-social spending).

Parallel to the simplified treatment of consumption, most studies also reduce the complexity inherent in SWB and well-being. Since the 1960s, subjective well-being (SWB; Diener 1984) has been the most frequently studied well-being concept by psychologists and marketers (Diener, Oishi, & Tay 2018; Ryan & Deci 2001; Sirgy 2012). SWB has been traditionally operationalized as satisfaction with life as a whole / Life Satisfaction, an overall holistic assessment (Diener et al. 1985; Pavot & Diener 2008), or by exploring the satisfaction with specific life domains – as for example in Cummin et al.’s (2003) Personal Wellbeing Index (PWI).

Two research traditions, hedonism and eudaimonia provide the foundations for modern psychological well-being research (Delle Fave et al. 2011; Peterson, Park, & Seligman 2005; Sirgy 2012; Waterman, Schwartz, & Conti 2008). In psychology research, well-being and subjective Quality of Life (QoL) lends itself to a three part categorization and subsequent operationalization: hedonic well-being (orientation to pleasure), eudaimonic well-being (flourishing) and the cognitive evaluative component of SWB (Ganglmair-Wooliscroft & Wooliscroft 2016; 2019; Graham and Nikolova 2015; Sirgy 2012).

There is increasing support to emphasize the complex nature of well-being and the parallel investigation of different facets of the construct is encouraged, including; cognitive judgements - life-satisfaction (Pavot & Diener 2018), hedonic approaches - positive and negative mood (Kahneman, Diener, & Schwarz 1999) and conceptualisations related to eudaimonic ideas - flourishing (Diener et al. 2010) or self-determination theory (Ryan, Huta & Deci 2008; Deci & Ryan 2008). Research suggests that Orientation to Pleasure (hedonic well-being, Peterson, et al. 2005) or flourishing (Diener et al. 2010) might have a stronger relationship with categories
of consumptions than SWB. For example, Ethical Consumption Behaviour (Ganglmair-Wooliscroft, and Wooliscroft 2016, 2019) or Energy Saving Behaviour (Wooliscroft & Ganglmair-Wooliscroft 2014) are most strongly related to flourishing.

The proposed research will broaden the context of consumption and explore its impact on different facets of well-being. Consumption activities are mapped onto different categories of need-satisfaction, using Maslow’s (1954) model as conceptual framework, and subsequently related to different facets of well-being, specifically flourishing, Orientation to Pleasure and SWB.

Figure 1: Conceptual Model: Multiple consumption activities’ effect on facets of well-being

It is proposed that different consumption categories relate differently to facets of well-being (e.g. Tay & Diener 2011; Vittersø & Søholt 2011); for example, an evaluative, cognitive judgement of one’s personal circumstances as implied in measures capturing satisfaction with life domains will be stronger related to consuming basic necessities, while consumption aimed at mastery of a skill is stronger related to flourishing. The research will provide a more nuanced understanding of the relationship between a variety of consumption categories and facets of well-being. Results from a preliminary survey (to be conducted in April 2019) will be presented at the Macromarketing Conference.

References:


Teaching (Macro)marketing
Ben Wooliscroft, University of Otago, New Zealand

We, the macromarketing community, gather around the central subject of the interactions between markets, marketing and society. There are very few macromarketing courses in the world, but a number of business and society courses, and sustainable marketing/business courses. This paper posits that teaching macromarketing does not require macromarketing to be in the title or the course outline. What is it that makes a macromarketing course? What is it that makes a macromarketing teacher? This paper proposes four attributes of both. It also asks the question what our goal should be regarding teaching macromarketing.

In recent years I’ve taught Business and Society (first year course in the core/compulsory papers), Marketing Past and Future (MBA course), Marketing Theory (doctoral course) and our Introductory Marketing course. None of those courses are called macromarketing, nor do they have a significant named macromarketing component. But, they are all taught as macromarketing courses, by a macromarketer.

What is it that makes teaching macromarketing? Is it the label macromarketing? Is it a committed macromarketer at the front of the room? I suggest that macromarketing teaching requires the inclusion of some or all of four attributes:

1) Consideration of the impact of business/marketing/markets on society and vice versa, including typical and extreme cases (at both ends of the continuum)

2) Critical reflection on, among other things, the current dominant ideology — what it is, its philosophy, its implementation, its strengths and weaknesses, benefits and costs. This includes a recognition of historical marketing systems — they have been and can be different to today’s model

3) A systems approach to market phenomena including being open to externalities

4) Considering quality of life and societal well-being as the goal of marketing systems instead of profit. This is a different starting point for the ethical component of business and consumption choices

Consideration of the impact of business/marketing/markets on society and vice versa

This is at the very heart of the definition of macromarketing (Hunt and Burnett, 1982) and the bi-directional relationship, with feedback loops, is one of this attributes of deep macromarketing teaching that is not negotiable. Too much of the curriculum in many marketing departments considers what business does to (potential) consumers, and to what consumer behaviour that leads. The impact of business on wider society and the impacts of society on business is all too often ignored.

Critical reflection on the current dominant ideology and recognition of historical marketing systems

The very act of making explicit the dominant social paradigm is the first step in this action (Kilbourne, McDonagh and Prothero, 1997; Kilbourne, Beckmann, Lewis and Van Dam, 2001; Kilbourne, Beckmann and Thelen, 2002). What are the hidden assumptions in our/your society?

This is not the same as being a critical marketer. It does not require readings from dead French philosophers, Marx, etc.. At the same time a reflective reading of those authors may be useful to contextualise the theories and assumptions in the current, and past, dominant ideologies.
What is required is the life long skill and practice of critical reflection. What is the counter argument and evidence? Is this a logical conclusion? Which assumptions are required to make that conclusion logical and are they really tenable? My view of marketing is informed by a very old definition/conceptualisation of marketing:

Marketing is not primarily a means of garnering profits for individuals. It is, in the larger, more vital sense, an economic instrument used to accomplish indispensable social ends. Under a system of division of labor there must be some vehicle to move the surplus production of specialists to deficit areas if society is to support itself. This is the social objective of marketing. (Breyer, 1934, p. 192)

Anything that happened before a student was in high school is generally considered ancient history and as far from today as the wearing of togas (a heavily ‘branded’ status oriented act of conspicuous consumption). Reading some of the earlier writing on marketing might jar with our ‘enlightened’ views, being set in the time of the author, but there is much value in seeing how the market(ing) system operated in historically recent times. With less dominant major players and more competition markets were more efficient. At the same time production often took place close to market, meaning that the benefits of employment flowed into the same society as the benefits of consumption. Taxes have also been much higher in most countries at times during the last century, during times of high growth.

A systems approach including considering externalities


Macromarketing is in many ways a matter of scale, moving beyond micromarketings focus on the:

- single firm to customer relationship/ interaction/ exchange/ communication
- single firm to single firm relationship/ interaction/ exchange/ communication

Micromarketing shares some of the ceteris parabus assumptions or simplifications of economics. Macromarketing looks at the more complex interactions between multiple firms/ industries/ customers/ governments, with associated difficulties.

The vast majority of micromarketing theory and practice is fully committed to ignoring externalities. Macromarketing is the subdiscipline where externalities are most frequently discussed and solutions are proposed (Mundt and Houston, 1996, 2010; Mundt, 1993). While there is clearly work still to be done in this area — externalities remain ubiquitous and have great impact — macromarketing scholars are those with the head start in this area.

Quality of life and societal well-being as the foundation of the ethical component of decisions

When GDP is a proxy for quality of life, a war, natural disaster or disease outbreak leads to an increase in the ‘quality of life’ (GDP) of a country. Macromarketing teaching does not allow GDP to be the summative variable for societal/national well-being, measures of quality of life are required. (Diener and Fujita, 1995; Frisch, Clark, Rouse, Rudd, Paweleck, Greenstone and Kopplin, 2003; Granzin, 1987; Ganglmair-Wooliscroft and Lawson, 2005; International Wellbeing Group, 2005; Lee and Sirgy, 2004; Malhotra, 2006; Peterson, 2006; Sirgy, Meadow and Samli, 1995; Sirgy, 1998).
Both the decisions and philosophy of business (Mitchell, Wooliscroft and Higham, 2010) and consumers (Wooliscroft, Ganglmair-Wooliscroft and Noone, 2014) are considered when macromarketers teach. It is not enough to blame the ills of the world on either consumer sovereignty (Birmingham, 1968) or evil business (Klein, 2000). Nor is the consumer without blame and the business always virtuous in the manner that Henry Ford (cited in Sinclair (1962, p.369)) suggested when he stated that,

There is something sacred about big business. Anything which is economically right is morally right.

Macromarketing authors such as Mitchell et al. (2010) challenge this view and provide a vision for a more socially responsible business model.

Discussion

There are two ways we can teach macromarketing: 1) in a course titled macromarketing (or something similar) likely to be an option paper or high level paper or 2) by bringing our macromarketing insights to every class we teach. Having never had the luxury of the first I have committed myself to the second at every possible moment.

Does this mean that many of us have been teaching macromarketing in non-macromarketing marketing courses? Given the marketing textbooks available to us, with the exception of Peterson (2012) and the out of print Fisk (1967), have none of the above attributes.

The Future of Macromarketing Teaching?

Economics frequently has two papers in the core of business studies: micro and macro economics. Marketing is not always present in the core of an AACSB batchelors programme (not at my school). What do we need to do to have micro and macromarketing present in the central knowledge required of a business student? What would a macromarketing introductory course look like? Do we speak with the same (misguided) authority as (macro)economics? Perhaps that is our problem, we recognise that real market places are messy, complex, confusing and unpredictable — difficult places to research (Wooliscroft, 2016).

Can we create a curriculum that is at an introductory level, that provides a set of models and tools equivalent to the 4Ps, Maslow’s hierarchy, etc.?

- Which two by two matrices and models can we provide?
- What will our mnemonic be?

What abstractions of our rich field that allows a student to enter the world of macromarketing without being confronted with the complexity, chaos and messiness of high level macromarketing thought and reality. This would be a course that leaves the individual firm and the individual consumer to micromarketing and operates in the systems space.

Is it time to revisit Alderson and Cox (1948) and propose a collection of sources for macromarketing teaching and research?

References


Oreos and Kombucha? The Effect of Big Food Companies Acquiring Health Brands on Shareholder Value

Wonjoo Yun, Hankuk University of Foreign Studies, South Korea
Nicole Hanson, Idaho State University, USA

Consumers are increasingly seeking out healthier food options, such as natural and organic products. Sales of organic food in the U.S. continue to steadily increase over the past decade. In 2008, annual sales of organic foods totaled $20.4 billion, and by 2017, sales increased to $45.2 billion (Organic Trade Association’s 2018 Organic Industry Survey). This rapid growth has led many “big food” companies to enter the marketplace, and as a result, product mix portfolios are being altered. Some recent acquisitions include General Mills purchasing Annie’s, Cola-Cola acquiring Honest Tea, PepsiCo buying Naked, and Kellogg’s taking ownership of Kashi.

Such acquisitions allow firms to pursue a marketing strategy of altering their product mix portfolios by acquiring existing organic and natural food brands instead of building a new one from the scratch. Our research seeks to understand how the acquisition of existing organic and natural food brands impacts the shareholder value of “big food” firms. Our research examines abnormal returns to stock market performance and also investigate various firm and industry specific variables.

Many “big food” firms are interested in acquiring established natural and organic brands, and such acquisitions are attractive for many reasons. Consumers who seek out organic and natural products tend to have much higher disposable incomes when compared to the general population (Hughner et al. 2007). Also, smaller companies tend to have more flexibility and are able to respond faster to changing consumer trends (Rowan 2018). Finally, many consumers view these smaller brands as more transparent, authentic, and trustworthy (Charles 2016; LeBlanc 2016; Rowan 2018).

Because of changing food preferences and behaviors, there is reason to believe that stockholders may react favorable to these types of acquisitions. Diseases associated with poor health choices, such as obesity and diabetes, are increasing annually and are drastically altering the lifestyle of millions of consumers, resulting in reduced lifespans (Cordain et al. 2005; Wyatt et al. 2004). As a result, food companies are coming under increased pressure to modify their portfolio offerings, and the acquisition of organic and natural foods brands may be one way to help accomplish this objective. Also, there is a growing movement from policy makers, advocacy groups, governmental agencies, and consumers to blame big food companies and their marketing of junk food for increasing obesity levels.

However, there may also be some unique challenges with big food companies acquiring organic and natural food brands. For example, possible product denigration may occur after the acquisition where cheaper quality ingredients are substituted and a commitment to sustainable practices, such as animal welfare and corporate social responsibility are diminished (LeBlanc 2016). Firms also face difficulties in understanding how their existing consumers will respond to healthier product offerings. For example, many consumers exhibit negative beliefs when it comes to healthy food and tastiness, believing that healthy food cannot taste as good as unhealthy food (Raghunathan, Naylor and Hoyer 2006).

Therefore, it is unclear if shareholder value increases when acquiring organic or natural food brands. Furthermore, the existing acquisition literature is mixed when it comes to studying the impact of acquisitions on shareholder value. For example, Moeller, Schlingemann and Stulz
(2005) examine acquisitions from the 1980s to the early 2000s and find that overall, acquisitions result in a negative wealth effect on shareholder value, suggesting that firms are better off not engaging in acquisitions. Also, a meta-analysis examined the long-term effects of acquisitions and basically finds no positive effect on the acquiring firm, and in the case of certain variables, a negative effect is found (King et al. 2004).

Our research questions are as follows: (1) What are the stock market returns from acquiring organic and natural brands? (2) What is the impact of the merger motive on stock market returns? (3) What is the impact of marketing intensity on stock market returns? (4) What is the impact of the target firm’s tenure on stock market returns?

To empirically test our research questions, we compile a unique data set and collect data on key variables to understand how acquisitions of organic and natural food brands impact shareholder value. Our sample has 59 publically traded U.S. food companies and their 165 announcements between the years of 1997 and 2015. Our sample of announcements is compiled by searching through Factiva and Lexis Nexus.

To estimate the impact of an acquisition on short-term stock returns we utilize an event-study methodology. This methodology is used extensively in the field of marketing and can answer a wide range of questions. This methodology relies on the efficient market hypothesis, which assumes that all publically available information is fully reflected in the current stock price. As investors take in new information, the stock price will adjust accordingly; an upward adjustment takes place for positive news, while negative news results in a downward adjustment to a firm’s stock price. To test the impact of merger motive, marketing intensity, and target firm’s tenure, we regress the Cumulative Abnormal Returns (CAR) on our focal and control variables.

Our initial research results find that such acquisitions result in a positive return on the short-term shareholder value. On average, acquiring firms experience a 1.25% return on the announcements of health and natural brands acquisition. We also find a significant positive effect when the primary objective of the merger is to gain market power by combining two firms with similar products. There is also a significant positive effect for marketing intensity. Finally, we also find a significant positive effect for a target firm’s length of tenure.

Our contributions to the literature include the following: 1.) Providing research findings from a nascent and underexplored area; 2.) Assessing the short-term returns from acquisitions of organic and natural food brands; 3.) Analyzing the impact of merger motive, marketing intensity and target firm tenure on shareholder value; and 4.) Discussing managerial recommendations.

Although the study shows interesting results on how food companies being sustainable and responsible by adding organic or all natural food products via M&As, this study’s finding is at best micro perspective to the business arena, not macro perspective.

Overall, we find that big food acquisitions of organic and natural brands are viewed favorably in the short-term, resulting in an abnormal return on shareholder value of 1.25%, on average. In the short-term, a firm merging to gain market power by combining two firms with similar products experience higher returns. Also, firms with higher levels of marketing intensity experience higher returns. Finally, big food companies that acquire target firms with more experience receive a higher amount of stock-market returns in the short-term.
References


