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The Value of Connection and Macromarketing Research in
Addressing Critical Global Issues

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*Listed in alphabetical order; both co-chairs contributed equally to the conference organization and success.

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Cultural (Digital) Phenomena, Markets and Marketing Systems Track

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Introducing the Algorithmic Intersectional Feminist Activist Movement: Macromarketing Disclosures of the Heterogeneous Interdependence of Hidden Data Labor

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Disclosing the full extent of otherwise hidden artificial intelligence (AI) labor yields a hyper-complex pattern of willful exploit upon a culturally heterogeneous workforce facing overlapping power imbalances (Steinfield and Holt 2020). In tracking how a consumer resistance movement could even exert counter-pressures upon structural domination, we follow (Valor, Diaz, and Merino 2017) in conceding there are macroprocesses at work that make resistance hard to assign against any single target oppressor. However, in contrast to their appeal to the works of Foucault and Arendt, intersectional social justice theory holds that women of color from the developing world have been both intentionally and unintentionally subjected to unjust domination through systemic racism not attributable to the conscious will of a single moral agent (Burrell and Fourcade 2021). As a guiding premise to complement the primacy of race, gender, and class as strong demographic determinants for participation in hidden data labor, one abiding constant to disclosing its practice is unveiling the ways in which intersectional tenets can be applied to marginalized stakeholders that may bring competing voices, collective memories, gendered experiences, and racial testimonies to the same material experiences (Davis 2007; Saatcioglu and Corus 2014; Steinfield and Holt 2020).

One macromarketing contribution would be to propose actionable improvements in quality of life through recognition of laborers that serve as necessary conditions for the possibility of globalized AI applications. Once the true social, moral, and monetary value of their contributions is brought to light, intersectional activist networks document and publish warranted distributive justice aims. These include but are not limited to eliminating unpaid labor, providing more stable work conditions, and offering access to full time benefits like a salary, healthcare, retirement savings, and paid leave. Data labor intersectional solidarity emerges through the shared disclosure of common negative experiences among hidden digital laborers in domains as diverse as search, facial recognition, audio transcription, image labeling, and geo-mapping. As a macromarketing objective of this research, we seek to pair up this hidden labor force with a growing body of consumer market activists concerned with their own moral culpability.

In terms of methodological commitments, we agree with Helma Lutz in positing "Intersectionality as Method" (2015) when construing intersectionality as 'a heuristic device or method that is particularly helpful in detecting the overlapping and co-construction of visible and, at first sight, invisible strands of inequality' (39). When wedding intersectional methodologies to macromarketing aims, we can make 'meso' societal connections between individual acts of micro-consumption and macro systemic institutions. Platform-mediated marketplaces demonstrate macromarketing institutional traits of high complexity, system heterogeneity, and species interdependence (Mittelstaedt, Kilbourne, and Mittelstaedt 2006). Once macromarketing aids intersectional scholars in demystifying the 'magic of AI' (Elish and Boyd 2018), their shared aim to disclose the intersections of race, gender, and class as crucial demographic indicators for detecting the presence of 'ghost work' (Gray and Suri 2019), 'data janitors' (Irani 2015), and 'fauxtomation' (Taylor 2018) exposes the dark side of data

automation. This is as an actionable first step toward mitigating the unwarranted moral harm of systemic racism. Teasing out the adverse impacts that tech entrepreneurs otherwise attribute to workers in a better place, their quality of life is too often cast through neoliberal images of happy, non-white, female, and global South workers to veil the systematic labor displacement we are all increasingly complicit in willing through everyday platform-mediated acts (Irani 2015).

In what we will term intersectional 'algoactivism,' figures like Noble, Buolamwini, Payton, Benjamin, and Burrell not only leverage their status as elite female scholars of color and privilege disseminating their work in the top journals of their respective disciplines, but they also wed their scholarly efforts to social activism (see Tables 1 and 2 below for more detail). For Noble, she began this path toward algoactivism through a testimonial experience of how teenage female family members of color ran queries on Google (Noble 2018). She observed that even in circumstances of private information searches concerning intersecting gender and racial identities, media of algorithmic socialization reflected the virtual public sphere of tying the search of 'black girls' immediately to pornographic sites as among the top 100 searches when searches for white girls showed no similar pattern (Noble 2018). Similarly, for Buolamwini (Joy 2018), the activity of a public researcher of emergent technologies that dealt with facial recognition could not be separated from her testimonial experience that had fueled her algo-activism into what she has termed the 'coded bias.' In her early doctoral studies, she found that she, as a woman of color, could not be algorithmically identified as the private subject she claims by name. Through the performative act of critical research on facial recognition, she discovered that she must wear a white mask for the technology to register her face as human. Shifting intersectionality to the domain of public health, Professor Payton's participatory approach to disclosing the ways in which medical data infrastructures often marginalize the women of color they are funded to serve (2014), has carried her to leadership prominence with the NSF. Payton gives community-based participatory models an intersectional spin in calling public health messaging to run through processes of co-creation among digital designers and those marginal groups most immediately affected as program co-curators worthy of recognitional input (Kvasny and Payton 2018).

Table 1. Opportunities for Future Macromarketing Systems Research using Intersectionality

Theory	Area	Macromarketing Systems Research Opportunity
Intersectionality	Digital Colonialism	Seek to amend, reconsider, and advance ICT4D research from the theoretical stance of intersectional theory with the testimonial experience of women of color as the social scientific evidence for addressing historical colonial injustice.
	Criminal Justice Surveillance Technologies	Encourage scholars to draw upon the theoretical resources of intersectionality to ask whether a more equitable balance of demographic representation in datasets will address more pervasive forms of culturally embedded systemic injustice.
	Epistemic Apartheid	Ask which theoretical framings are most missing from macromarketing scholarship and why. Consider initiatives that would encourage disciplines outside of STEM to read, cite, and engage with social-scientific bodies of research that might embolden researchers to forge more eclectic interdisciplinary theoretical framings.
	Algorithmic Bias	Consider reframing bias from the standpoint(s) of those experiencing intersecting forms of gender and racial discrimination and question the efficacy and feasibility of a neutral unbiased research perspective.
	Workplace Discrimination and ICT Diversity Initiatives	Encourage the inclusion of interdisciplinary perspectives directly engaging topics of gender and race in the A-list marketing journals, including special issues, the composition of the journal editorial teams, and selection of journal reviewer theoretical competencies.
	Biometric Identification and IoT Technologies	Encourage mixed-method scholarship that pairs together quantitative research on technological efficiency with a fair measure of qualitative and ethnographic studies that incorporate the voices and standpoints of persons affected, especially at intersectional margins.

Table 2. Key Scholars in AIFAM – The Algorithmic Intersectional Feminist Activist Movement

Name	Institution	Themes	Literature	Algoactivism
Jenna Burrell	Berkeley	Algorithms constitute a new means of production owned by the propertied coding elite as a class differentiator from the cyberteriat	'Society of Algorithms' (Fourcade 2021) 'How the Machine Thinks: Understanding Opacity' (2016)	Executive Research Director for Data and Society Institute
Safiya Umoja Noble	UCLA	Google search algorithms and other epistemic gatekeeping platforms evince tremendous bias toward women, minorities, and persons of color	Algorithms of Oppression: How Search Engines Reinforce Racism (2018)	One of the 25 members of the Real Facebook Oversight Board; Co-Director of UCLA Center for Critical Internet Inquiry
Fay Cobb Payton	NC State	Calling attention to health care information technology and intersectional disparities of race and gender by designing participatory models of community health provisions based on those most marginalized	Leveraging Intersectionality: Seeing and Not Seeing (2014)	American Council on Education Fellow; 2016 White House Summit on the United States of Women; National Science Foundation; *Essence Magazine* #BlackWomenIn; SAS Institute Fellow; NPR
Joy Adowaa Buolamwini	MIT	Algorithmic bias is pervasive in facial and voice recognition technologies, financial lending practices, policing measures, healthcare services, and many more domains that disproportionately harm historically underrepresented groups	'Gender Shades: Intersectional Accuracy Disparities in Commercial Gender Classification' (2018)	Founder of the Algorithmic Justice League; featured in the Netflix documentary film Coded Bias and the mini documentary The Code Gaze; heralded by Fortune magazine as 'the conscience of the AI revolution'

| | | Research at the interface of technology, race, and gender with a focus on how algorithmic code has institutionalized new forms of oppression against women, minorities, and persons of color | Race After Technology: Abolitionist Tools for the New Jim Code (2019); | Founder of the JUST DATA Lab (2018); Executive Board for Princeton Center for Digital Humanities; One of the 25 members of the Real Facebook Oversight Board |
| Ruha Benjamin | Princeton | | | |

Professor Benjamin's (Ruha 2019) approach takes the macro-societal dynamic to yet another classification of vulnerable consumers as denizens of virtual spaces algo-governed by what she terms 'the new Jim Code.' Benjamin has made a career of activism in researching the training data and biases that go into new technologies increasingly utilized by the carceral state in the form of recidivist (likelihood of repeat criminal offense) algorithms to determine lengths of incarceration. As an explicit critique of the limited powers of even the most technically astute data curation, datasets cannot be parsed apart from the structural inequalities that comprise the society from which the data curation is drawn. Lastly, for Professor Burrell, as the current research director of Data and Society, she pairs her unique command of AI in tandem with her encyclopedic command of the history of sociological theory to question whether the democratizing promise of the information revolution has brought about new forms of digitalized colonization (Burrell and Fourcade 2021). Burrell adds new meta-categories to our intersectional framing with three distinct typologies to the opacity that helps keep data curation labor hidden from public censure (Burrell 2016). First, proprietary opacity protects algorithms under the guise of state-sanctioned private property protections that ensure for-profit personalization indices cannot be gamed (or recalibrated or critically assessed) by relevant stakeholders as diverse as advertisers, influencers, competitors, or even state actors. Second, literacy-based opacity deals more with the interpretive framing of algorithmic personalization whereby data curation factories are recast as technological centers to mask modes of crowdsourced divisions of labor as micro-tasked informational gatekeeping. Thirdly, opacity due to complexity of application scale begins to parse out the manners in which rule-based algorithmic learning (such as recognizing numbers, faces, or handwriting) sharply differs from human learning in manners whereby we are often left with 'known unknowns' that emerge through otherwise seemingly spurious correlations that have yet to find equivalences in human information processing and learning. For Burrell, while each level of opacity merits its separate conceptual classification, she also warns that the intersections of proprietary, literacy, and complex application scale opacities, when embedded within systems of maximizing market performance at the cost of those most vulnerable, show a decided tendency to accelerate epistemic and material disparities in reinforcing systemic patterns of racism. Insofar as the most advanced algorithmic models are under the proprietary domain of GAFAM (Google, Amazon, Facebook, Amazon, and Microsoft), for better or worse, one contribution of our research is to show that macromarketing takes on arguably the heaviest onus of responsibility for intersectional systemic injustices since once constant to GAFAM is the unrivaled sophistication of their personalized algorithms for strategic purposes of targeted marketing (Gray and Suri 2019).

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No Place to Hide: In-School Marketing, the Commodification of Children and the Commercialisation of Education

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In-school marketing (ISM) is a widespread global practice that is the focus of much debate and increasing concern. The tension between commercial imperatives and educational priorities has been recognised by the United Nations' Special Rapporteur for Children who has called for centrally mandated regulation of ISM. In response, a variety of policies have been developed in different countries to regulate the practice. However, understanding the nature and extent of commercial activities in schools is difficult and a growing number of academics have called for more research in this area. Accordingly, this paper explores the nature and extent of ISM in NZ primary and intermediate schools. Results suggest extensive incidence of ISM in a variety of forms including product branding, corporate merchandise, sponsorship and curriculum materials.

Introduction

ISM is widespread across all levels of education and is increasingly normalised as new marketing opportunities arise within and around schools, blurring the boundaries between private and public, profit and philanthropy (Enright and Macdonald 2020; Marsh 2017). Schools, struggling with inadequate public funding, are welcoming the perceived benefits of ISM without necessarily recognising the threats that increased exposure to marketing can bring to children's wellbeing or to the integrity of the education they receive (Molnar et al. 2015; Thrupp et al. 2020). Balancing the need to provide the resources necessary for an effective education with the consequences of reduced budgets, ISM seems to provide a mutually beneficial solution to the problem. However, there is growing concern with the potentially negative effects on children of increased exposure to marketing (Opree 2014), and the consequences of increased commercial influence on educational imperatives (Marsh 2017; Molnar et al. 2010). ISM is also cause for concern given the susceptibility of children to commercial messages (Oates et al. 2002) and that they are a captive and credulous audience in an educational environment where marketing messages are legitimised by their on-going presence in and around the school (De Lulio 2019; Molnar et al. 2011).

The increasing incidence of ISM and research on the negative impacts of marketing on children's social and psychological well-being has resulted in increasing ethical concerns with its appropriateness and a recent UK report states that "commercialising programmes in schools bring with them serious threats to children's education and to their psychological and physical well-being" (Molnar et al. 2013). One key concern is that ISM contributes unnecessarily to the already marketing saturated world of children who are vulnerable to its affects (Brent and Lunden 2009). Concerns about children's vulnerability to the effects of exposure to marketing are based on their limited ability to understand its motivations and their susceptibility to persuasive advertising (Calvert, 2008; Oates et al. 2002).

Specifically, literature raises concerns that commercial partnerships can harm children educationally by displacing other educational activities and messages (Robinson et al. 2016), for example through the presence of soft drinks and unhealthy foods which contradict nutrition education. Another important harm is the threat that it poses to critical thinking given the implicit endorsement of particular brands and products (Farinha 2015). (Molnar et al. 2011) suggest that the values and goals of education are incompatible with the imperatives of business and that the need to foster critical thinking, independent (and freedom of) choice and self-determination do not sit easily with the preferential promotion and endorsement of particular brands and products. As (Robinson et al. 2016) caution, ISM resources are shaped by corporations' biased, value-laden, and ideological views, and 'the desired knowledge(s) of corporations are necessarily present, if not influential or foundational, when such resources are conceived, produced, and distributed.' (p1). A final concern is the extent to which ISM normalises the relationship between consumption and education. As complementary sites for the inculcation of social values, schools have a responsibility to socialise children as citizens rather than consumers.

Summary
Children are exposed to an increasingly wide range of ISM that marketing research and educational policy have not kept up with. Research is required, therefore, to understand the nature and incidence of ISM to inform policy development and make recommendations for its management.

Research Question
What is the nature and extent of ISM in NZ schools?
Study 1 provides an objective analysis of children's total in-school exposure to marketing through an ancillary study of the NZ Kids'Cam data.
Study 2 offers a qualitative analysis of the nature and types of ISM found in schools.

Study 1 – Kids'Cam Data analysis

Methodology
Kids'Cam was a cross-sectional, observational study that used automated wearable camera devices to capture the everyday experiences of children in NZ (Signal et al. 2017a). The cameras captured a 136 degrees image ahead of the wearer every seven seconds (see ISM image examples in Figure 1 below). Full details of the Kids'Cam methods, sampling and coding are published elsewhere (Signal et al. 2017a, 2017b). The data used for the Kids'Cam branding study (Watkins et al. 2019; Watkins et al. 2022) on which this ancillary study is based, analysed the images of a random sample of 87 participants stratified by sex, ethnicity and deprivation which were coded for all marketing exposures for two full days. Coding was based on a four-tier framework, including the marketing brand name, setting, marketing medium and product category (Watkins et al. 2022).

Analysis
For the present study we analysed the in-school exposure to determine the nature of advertising children were seeing in this setting. Mean daily exposure rates to commercial marketing were estimated using negative binomial regression models, represented by the count of individual exposures divided by the exposure duration.

Results
In the school setting children encountered 53.9 messages per day. Significant differences in product category exposures by demographics were also examined. While few significant differences were found, Māori children see more brands in total, and more 'Other' brands than NZ European children.

Study 2 – School Audit
To provide a fuller picture of the context within which children were exposed to marketing, we conducted an observational analysis of ISM in 20 NZ primary schools.

Methodology
Using the Ministry of Education school directory, principals were contacted in three major NZ cities to provide a range of population sizes and decile ratings. Direct observation was considered to be the most appropriate method for this study given that it could be undertaken by the research team and not require additional time from school staff (Velazquez et al. 2017). Examples of ISM were identified visually and recorded manually on separate spreadsheets in columns labelled Location, Brand, Medium and Frequency. A column for General comments was also included.

Results
Initial coding revealed the main marketing mediums to be brand labels, print media (especially posters), and promotional/merchandising. The majority of exposure was to brand labels for 'expected brands' e.g. Office Max, stationary; Nike, sports equipment; Apple, electronics and Panasonic hardware. Print media in the form of posters and flyers, mostly located in classrooms, common areas and gymnasiums, were the most prevalent. Specific examples of Brands noted for their frequent presence in multiple schools were Scholastic Book Clubs and Fonterra.

Discussion
Results from both studies show that children are exposed to a significantly high, and increasingly varied, amount of marketing in school. Indeed, children's exposure to marketing in schools is higher than it is in other settings such as at home and in the community. Some examples of ISM include social marketing messages that discourage smoking, encourage sunsmart behaviour and promote the importance of mental wellbeing. Clearly, these examples of socially acceptable marketing are to be encouraged in an environment where the provision of reliable information, advice and support are to be expected. Of concern, however, is the level of marketing saturation within which they compete for attention. One of the most common forms of ISM observed was sports sponsorship and merchandising. In relation to leading sports teams and competitions, the names of the major sponsors were prominent on posters, flyers, wallcharts and calendars advertising their relationship. Apart from leading sports brands, such as Nike, Adidas and Reebok, none of the other major sponsors had a direct or obvious association with sport, for example large banks (ANZ, Westpac and ASB). In relation to physical equipment, the same pattern of associations was evident. Westpac bank, for example, provided sports bags, and Lotto, NZ's national gambling organisation, provided cones and Frisbees. Perhaps the most common, and certainly the most widespread, example of ISM is represented by Scholastic Book Club. In addition to books and reading materials, Scholastic also offers a wide range of activity products

such as puzzles, colouring sets, jewellery, toys, and branded merchandising products such as Roblox, Minecraft and Pokemon. This integration of educational and non-educational products in a non-retail setting, positions children as customers and blurs the line between commercial interests and educational values.

In relation to health and food, the most conspicuous example of ISM was the presence of two of NZ's leading food producers, Fonterra and Sanitarium. Following a nationwide initiative to provide free milk in schools, Fonterra aligned with Sanitarium, a leading producer of breakfast cereals, to make free breakfasts available to schoolchildren throughout NZ. The merits of such schemes have been discussed in a number of academic studies and while there is agreement on the need for a healthy start to the school day, there is concern with the branded nature of the products being provided. For a captive and impressionable audience, for whom early brand experiences lead to later brand preferences (Connell et al. 2014; Nairn and Ormrod 2005), the benefits of a branded breakfast need to be understood in relation to the strategic benefits it brings to its sponsors (Aitken and Watkins 2017).

Increasingly, concerns with ISM are also focussing on schools' reliance on privately produced commercial resources to supplement their work in response to changing curriculum priorities and reductions in central funding. The increasing availability of commercially produced educational programmes is part of a global education industry which is redefining how education is marketised, privatised and commercialised (Enright et al. 2020). In addition to concerns with the propriety of industry partners and the ideological imperatives of commercially produced educational materials, are those concerned with equity. In short, the implications of schools' increasing reliance on commercial sources of funding, is the extent to which inequalities arise as schools in poorer areas become disproportionately dependent on alternative sources of income (Valequez et al. 2017; Brent et al. 2009).

Conclusion
Results from the present research show that ISM is a common feature of the school environment and a normal part of children's educational experience. It features explicitly in the form of sponsored programmes and products and implicitly in the provision of equipment and teaching resources. Increasingly, curriculum needs are being met by commercial contributions as schools work to balance reduced budgets and increased demands. Uncritically, the relationships between commercial interests and educational imperatives could be seen as mutually beneficial. Schools need the resources to achieve their aims and businesses have the resources to enable them. A more critical analysis, however, would suggest that the implications of this relationship are not fully understood or adequately addressed. Concerns have been raised about children's exposure to ISM and the increasingly branded nature of their educational experience. A key concern is that ISM contributes unnecessarily to the already marketing saturated world of children who are vulnerable to its affects (Brent and Lunden 2009). A final concern is the extent to which ISM normalises the relationship between consumption and education. As complementary sites for the inculcation of social values, schools have a responsibility to socialise children as citizens rather than consumers. The tension between commercial interests and educational imperatives has been recognised by the United Nations' Special Rapporteur for Children who has called for centrally mandated regulation of ISM (2014). Identifying the nature and extent of ISM as presented in this research is an important step to inform such regulation.

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The Nature of "legitimate profit" from the Perspective of Catholic Social Teaching: Implications for Macromarketing

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No profit is in fact legitimate when it falls short of the objective of the integral promotion of the human person, the universal destination of goods and the preferential option for the poor, and we can add, the protection of our common home (Francis 2022)

In early 2023, the well-known home goods chain Bed Bath & Beyond prepared for bankruptcy following a run of poor sales, a situation faced by other U.S. retailers such as Sears Holdings Corp, which filed for bankruptcy in October 2018 after not turning a profit since 2011 (Reuters 2023). Profits are essential for the running of the business and businesses that do not make a profit such as the examples of Bed Bath & Beyond and Sears Holdings and who file for bankruptcy often face the possibility of being closed. For instance, Bed Bath & Beyond as of early February 2023 had closed about 400 stores over the past year (Valinsky 2023) and in April 2023 announced that it would close all its stores by June 2023 (Holman and Hirsch 2023). Such closures affect many thousands of lives of employees, suppliers etc. and create a disruption in the social fabric and the marketing system. Therefore, one element that bestows legitimacy on profit is its connection to the very existence and growth of the business enterprise. However, is the existence of the business a sufficient justification as to the legitimacy of profit?

The Merriam-Webster (2023) dictionary lists several definitions for the word "legitimate." Some of these include "lawfully begotten;" "being exactly as intended or presented;" "genuinely good, impressive, or capable of success;" "accordant with law or with established legal forms and requirements;" "conforming to recognized principles or accepted rules and standards;" etc. While the term "legitimate profit" has an element of being in accordant with the law, its usage in Catholic social teaching is better aligned with conforming to recognized principles of accepted rules and standards. In this paper, we explore these accepted rules or standards in Catholic social teaching that lend legitimacy to the "profit" dimension of a business enterprise. First, to be clear, our usage of the word "profit" relates to the financial bottom line of the business. Our focus here is on for-profit businesses. It is possible that there might be different conceptualizations of profit in not-for-profit or social enterprises or even indigenous contexts. However, that discussion is beyond the scope of this paper. We begin with a quick overview of Catholic social teaching (CST) and then discuss what in our opinion are four criteria that Pope Francis provides us to evaluate the legitimacy of profit. We then connect the notion of legitimate profit with macromarketing, using the concept of socially responsible marketing (Laczniak and Shultz 2021) as the prism.

Catholic social teaching: A brief overview

Catholic social teaching (CST) comprises of all the official writings of the Catholic church regarding social issues. While CST is rooted in the Christian scriptures and the teachings of prominent Catholic theologians over the years, a generally accepted starting point is the encyclical of Pope Leo XIII (1891) titled *Rerum Novarum*. This encyclical addressed some of the abuses of the Industrial Revolution that were an affront to human dignity. Since *Rerum Novarum,* over the course of the last 132 years, the church has issued a number of documents

that address varied social issues. Prominent among these are *Quadragesimo Anno* (Pope Pius XI 1931); *Mater et Magistra* (Pope John XXIII 1961); *Pacem in Terris* (Pope John XXIII 1963); *Populorum Progressio* (Pope Paul VI 1967); *Octogesima Adveniens* (Pope Paul VI 1971); *Laborem Exercens* (Pope John Paul II 1981); *Sollicitudo Rei Socialis* (Pope John Paul II 1987); *Centesimus Annus* (Pope John Paul II 1991); *Caritas in Veritate* (Pope Benedict XVI 2009); and *Laudato Si'* (Pope Francis 2015). At the heart of the corpus of CST are four foundational principles also called the permanent principles of CST. These are: the dignity of the human person; the common good; subsidiarity; and solidarity. The United States Conference of Catholic Bishops (2023) list seven key themes of CST. These are: (1) Life and dignity of the human person; (2) Call to Family, Community, and Participation; (3) Rights and Responsibilities; (4) Option for the Poor and Vulnerable; (5) The Dignity of Work and the Rights of Workers; (6) Solidarity; and (7) Care for God's Creation.

An encyclical of special importance is *Centesimus Annus* (Pope John Paul II 1991) which states that "the Church acknowledges the legitimate *role of profit* as an indication that a business is functioning well" [emphasis in original]. However, the encyclical adds "but profitability is not the only indicator of a firm's condition…..In fact, the purpose of the firm is not simply to make a profit, but is found in its very existence as a *community of persons* who in various ways are endeavouring to satisfy their basic needs, and who form a particular group at the service of the whole of society." The encyclical calls on businesses to consider other human and moral factors together with profit which are also important for the life of the business. Here the legitimacy of profit draws from it being an indicator of a well-functioning business. In the encyclical *Caritas in Veritate* Pope Benedict (Benedict 2009) states that "once profit becomes the exclusive goal, it is produced by improper means and without the common good as its ultimate end, it risks destroying wealth and creating poverty." Pope Francis (Francis 2022) goes a step further by providing us with criteria to evaluate the legitimacy of profit. We elaborate on these in the section below.

The legitimacy of profit
Pope Francis (Francis 2022) during his address to the participants of the meeting of Deloitte Global lists four criteria to evaluate the legitimacy of profit: (a) Integral promotion of the human person; (b) Universal destination of goods; (c) Preferential option for the poor; and (d) care for our common home. The first three were mentioned in a document published by the Congregation for the Doctrine of the Faith and the Dicastery for Promoting Integral Human Development (Vatican 2018) to which Pope Francis adds the 4th, namely, care for our common home.

Integral promotion of the human person: A foundational principle of CST is that of the dignity of the human person (Pope John XXIII 1961; Vatican 2004). This dignity is not something that is merited or acquired by one's efforts but rather is a given (Santos and Laczniak 2009). In keeping with such dignity, it becomes imperative to create structures that help the development of the individual. In fact, "the integral development of every person, of every human community, and of all people, is the ultimate horizon of the common good that the Church…. seeks to advance" (Vatican 2018).

Universal destination of goods: The foundation of the universal destination of goods is that "the earth, by reason of its fruitfulness and its capacity to satisfy human needs, is God's first gift for

the sustenance of human life" (Vatican 2004). The material goods needed for the human person's existence are indispensable for the person to survive and to attain his or her purpose in life. The universal destination of goods does not mean that "everything is at the disposal of each person or of all people, or that the same object may be useful or belong to each person or all people" (Vatican 2004). Instead, the purpose of this principle is to invite an economic vision that aims at fairness and solidarity.

Preferential option for the poor: The principle of the universal destination of goods requires that the poor and the marginalized be the focus of particular concern. The fact that a vast number of people in the world lack access to housing, nutrition, adequate healthcare, sanitation etc. is an affront to development. As the United States Catholic Bishops (1986) in their pastoral letter *Economic Justice for All* point out, "the justice of a society is tested by the treatment of the poor." They further add, "this 'option for the poor' does not mean pitting one group against another, but rather, strengthening the whole community by assisting those who are most vulnerable."

Care for our common home: Pope Francis (Francis 2015) elaborates on the need for caring for the physical environment in his encyclical Laudato si'. This encyclical is aimed at bringing the whole human family together to think about the future of the planet and to seek a path towards sustainable and integral development. Klein and Laczniak (Klein and Lachznaik 2021) contend that Laudato si' provides a macromarketing manifesto for a just and sustainable environment.

Implications for Macromarketing

Laczniak and Shultz (Laczniak and Shultz 2021) define socially responsible marketing (SRM) as consisting of "practices and perspectives mandated by an implicit *social contract* (SC), which requires marketing policies, actions and outcomes to adhere to a *corporate* ["good"] *citizenship* (CC) that is proactive and non-discretionary." They further add that SRM "is informed by a *stakeholder orientation* (SO) that recognizes an authentic consideration of stakeholder claims, especially those of the customer/consumer and vulnerable stakeholders. Further, SRM seeks *social and environmental sustainability* (SES) in all its actions." At the heart of Laczniak and Shultz's definition of SRM is the concept of the social contract (SC). Laczniak and Shultz (Laczniak and Shultz 2021) elaborate that the "social contract is the explanation and justification for caring about and engaging in SRM" and further, "the core of a social contract is that there exists an *implicit* but deducible understanding between collective members of society and business organizations, including marketers." In many respects, the specifics of the social contract are elaborated in the elements of corporate citizenship, stakeholder orientation, and social/ecological sustainability. While one could argue for the legitimacy of profit from the perspective of these three elements, we hold that the four criteria mentioned in the section above provide a defensible set of principles that are grounded in Catholic social teaching. We list four normative propositions based on each of the four criteria that Pope Francis mentions below:

1. Profit should not be attained by any means that violate or compromise the dignity of the human person.
2. Profit should not be attained by unfair means or means that deny fair access to goods and services.

3. Profit should not be attained by taking undue advantage of the poor and marginalized populations. Further, profit should not result in these populations being worse off on account of business operations.
4. Profit should not be attained through any means that result in environmental degradation.

Conclusion

In this paper, we have elaborated on the concept of "legitimate profit" from the perspective of Catholic social teaching. Four criteria are provided that allow us to evaluate the legitimacy of profit of a for-profit enterprise. These are: (1) Integral promotion of the human person; (2) Universal destination of goods; (3) Preferential option for the poor; (4) Caring for our common home. We use the recently provided definition of "Socially Responsible Marketing" by Laczniak and Shultz (Laczniak and Shultz 2021) to draw implications for macromarketing. In our opinion, using the four CST criteria to evaluate the legitimacy of profit provides a sounder basis for the social contract and complements the SRM definition provided by Laczniak and Shultz.

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Socially Responsible Marketing and Engaging Impoverished Populations Towards a Sustainable Future: Lessons from Covid-19

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Introduction

The Development Data Group of the World Bank released a policy research working paper in October 2022 that attempts to quantify the impact of Covid-19 on Global Inequality and Poverty (World Bank 2022). According to the report, in 2020 the world witnessed the largest increase since the year 1990 to global inequality and poverty. Increased inequality and poverty globally implies an unsustainable future. It is no surprise then that two of the seventeen United Nations' Sustainable Development Goals (SDGs) are directly connected with inequality and poverty. SDG#1 is aimed at ending poverty in all its forms everywhere and SDG#10 aims are reducing inequality within and among countries. The SDGs also known as the 2030 Agenda for Sustainable Development were adopted by the United Nations' member states in 2015 (United Nations 2015). The signatories of the SDGs in 2015 had no idea that the world would be hit by a global pandemic a few years later, wreaking havoc to these well-made plans. Covid-19, in fact, shone light on the acute disadvantages and challenges that the poor and disadvantaged face. The advice of public health experts to avoid or minimize the effect of the pandemic such as avoiding crowds, stockpiling groceries, working from home or contacting a doctor if ill could hardly be followed by impoverished populations because of "their lack of economic resources, deprived locations, employment demands, or the absence of reliable healthcare (Santos and Laczniak 2021, p. 142; Vesoulis 2020). In effect, as Santos and Laczniak (2021, p. 142) point out, "the poor bear a disproportionate burden of the pandemic and this social outcome is 'unjust and unfair." As we move into a somewhat post-pandemic future, businesses need to engage impoverished populations in light of the lessons learned during the pandemic so as to move towards a more sustainable future, one that works for all humanity, but particularly for the impoverished. This paper draws on a conceptually rich document, one that proposes a normative-ethical and macro definition of "socially responsible marketing" (Laczniak and Shultz 2021) to recommend normative guidelines towards a sustainable future when engaging impoverished populations.

In a seminal article published in the *Journal of Macromarketing,* Laczniak and Shultz (Laczniak and Shultz 2021) begin by stating that "if marketers are to create a better world through socially responsible marketing, they require a comprehensive roadmap of what that means and where it leads." According to Laczniak and Shultz, a clear definition of socially responsible marketing is needed to evaluate social progress. Thus, their aim in their paper is "to articulate and justify a comprehensive definition of socially responsible marketing that marketing managers and academic researchers can utilize to evaluate and to improve ethical and socially compatible marketing (Laczniak and Shultz 2021). The comprehensive definition they propose is (Laczniak and Shultz 2021), emphasis in original):

Socially Responsible Marketing (SRM) consists of practices and perspectives mandated by an implicit *social contract* (SC), which requires marketing policies, actions and outcomes to adhere to a *corporate* ["good"] *citizenship* (CC) that is proactive and non-discretionary. It is informed by a *stakeholder orientation* (SO) that recognizes an authentic consideration of stakeholder claims, especially those of the customer/consumer and vulnerable stakeholders. Further, SRM seeks *social and environmental sustainability* (SES) in all its actions. The manifestation of SRM should be evaluated by a normative ethic of *distributive justice* (DJ) and coordinated with a macromarketing disposition for *constructive engagement* (CE), when addressing the marketing/society interface.

According to Laczniak and Shultz, corporate citizenship, stakeholder orientation and social and environmental sustainability are at the core elements that define socially responsible marketing. The social contract, distributive justice and constructive engagement are the dimensions that vitalize the doctrine of SRM. Commenting on the Laczniak and Shultz (2021) paper, Santos (2022) points out that even though social and environmental sustainability is one of the core elements of the SRM definition proposed, Laczniak and Shultz give scant attention to social sustainability. In responding to commentaries on their paper, Laczniak and Shultz (2022) acknowledge Santos' (2022) assessment and state that: "We hope Santos'[s] paper stimulates further analysis of the connection between SRM and social sustainability." This paper partially takes up this invitation by first highlighting some lessons learned during Covid-19. We then propose a framework for macromarketers to consider when evaluating social sustainability, namely, the Integrative Justice Model (Santos and Laczniak 2009a, 2009b). The IJM has been previously presented in the macromarketing literature (Facca-Miess and Santos 2016; Laczniak and Santos 2011). The IJM is a normative ethical model for just and fair marketplace exchange, particularly critical when engaging with impoverished or otherwise vulnerable consumers (Laczniak and Santos 2021). The IJM posits five core tenets that, when adhered to, can facilitate social sustainability through the evaluation of socially responsible marketing. The IJM requires 1) authentic engagement with non-exploitative intent, 2) value co-creation 3) investment in future consumption without endangering the environment, 4) interest representation of stakeholders and 5) a long-term profit management perspective rather than short-term profit maximization. Further, we submit that the evaluation of these core tenets and related decision principles (Santos and Laczniak 2012) should be grounded in the voices of the impoverished consumer or beneficiary impacted by SRM, or lack thereof (Facca-Miess 2021; Facca-Miess and Santos 2016).

Lessons from Covid-19
Since the time of the onset of the COVID-19 pandemic in early 2020, there have been a number of studies that examined the strengthened focus of organizations on Corporate Social Responsibility in response to the pandemic, both internally from an employee care and workplace safety perspective and externally from a marketing and communications orientation. He and Harris (2020) describe a shift in the process of consumer ethical decision making and a desire on the part of companies and consumers for authentic CSR and products and firms that are authentically addressing the world's most urgent social and environmental challenges. This not only aligns with the Stakeholder Orientation (SO), but also signals a broader awareness of the role of businesses and organizations in affecting the well-being of multiple stakeholders.

From service-oriented businesses to more traditional producers, socially responsible business operations and marketing gained heightened awareness in the wake of the pandemic, with both positive and negative examples of organizations' responding to COVID-19 and the many challenges surrounding it. Large-scale crises, such as the COVID-19 pandemic, can be seen to test the moral resolve of firms to remain committed to social responsibility or catalyze new efforts to promote and proclaim CSR as a core value (Schwartz and Kay 2023). Many firms responded swiftly to the crisis by committing to support employees, communities, and even governments in the collective fight against the spread of the virus, but with the backdrop of economic declines across firms, industries and regions as the effects of the pandemic escalated, this commitment was often tested.

The integrative justice model: Practical and pedagogical implications
As mentioned before, COVID-19 presented a host of challenges to vulnerable and marginalized populations. At the same time, as the section above alludes to, it forced companies to exhibit greater attention to the three core elements that constitute SRM, namely, corporate citizenship, stakeholder orientation and social/ecological sustainability. Eizenburg and Jabareen (2017) point out that there has, in general, been a lack of theoretical and empirical studies regarding social sustainability. Regardless of individual perceptions, understanding, or political perspectives, we need, as corporate marketers, policy makers, and macromarketers, to focus on teaching core concepts of social sustainability that includes respect for human dignity and working in solidarity toward the common good.

The IJM provides a tool, a framework, for evaluating the extent to which justice, inclusive of the aforementioned principles, is evident in an exchange, be it B2C or B2B. With a myriad of perspectives challenging each individual's perceptions and perspective every minute of every day, literally, we need well-grounded frameworks that can be considered when evaluating right from wrong, good from bad, sustainable from unsustainable. The IJM with its grounding in religious doctrine, moral philosophy perspectives and management theories, provides such a well-grounded framework (Santos and Laczniak 2009b). We present evidence from students at a U.S. business school in the context of a capstone marketing experiential learning project who presented, and won in two categories, at the 2023 annual International Business Ethics and Sustainability Competition. Students selected their target audience as the International Association of Jesuit Universities, but the hope and intent is that the message resonates regardless of our institutions' mission, be it private or public, faith based or not. Using the IJM, business leaders and students can assess the ethical implications of their decisions while considering economic, social, and environmental justice, and the Catholic Social Teaching (CST) principles of respect for human dignity and the common good. The United Nations' Sustainable Development Goals (SDGs) addressed include #4 Quality Education, #12 Sustainable Consumption & Production, #16 Peace, Justice & Strong Institutions, #17 Partnerships for the Goals. We provide evidence of students' responsiveness to the IJM as an ethical decision-making tool and means to implement the SDGs. Applying the IJM, educators can develop morally courageous business leaders who create a culture of transparency and accountability within companies by prioritizing the impact of their decisions on others, especially the poor or marginalized. By promoting morally courageous leadership and aligning Jesuit institutions with a shared framework for business ethics, we can create a more just and sustainable future for all. Moreover, we can collaborate on a shared promotional strategy to attract and give hope to the

youth, inspire them during their business education, and accompany them throughout their career. This work details the links between not only marketing theory and just marketing, but marketing practice and the SDGs.

Conclusion

In this paper we focused on the recently proposed definition of socially responsible marketing (SRM) proposed by Laczniak and Shultz (2021) with special consideration for vulnerable and impoverished populations. These populations had to face numerous challenges during Covid-19. At the same time, Covid-19 also presented a test to companies to evaluate their own moral response to the three core elements of SRM, namely, corporate citizenship, stakeholder orientation and social/ecological sustainability. While the concept of social sustainability gets neglected in conversations around sustainability, it is important to give this special consideration especially as marketing educators. The Integrative justice model is proposed as a framework that can be used both to evaluate and to promote social sustainability. An example is given of students at a U.S. business school who used the IJM in their capstone marketing class.

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Kaepernick, Jay-Z, and Du Bois:
Racelighting as a Wicked Problem and Violation of Hyper Norms of Global Conduct

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The purpose of this paper is to examine racelighting in its systemic macromarketing manifestations by construing it as a wicked problem. While my use of the case study method follows a narrative reconstruction of Colin Kaepernick and Jay-Z in their competing approaches to race in the NFL (National Football League), what might be perceived as unique to the US culture industry could be reframed from a macro-social marketing approach considering UN social development goal (SDG 16) as pertains to facilitating the inclusion of diverse perspectives to advance peace, justice, and strong institutions. Insofar as the NFL has been openly accused of discriminatory abuse of labor rights, we also find a transgression of the Hyper Norms of global codes of conduct that ought to guide societal impact research into macromarketing systems. The originality of the paper is to address an unexplored Kaepernick tweet as an instance of (anti)brand activism that directly references three strands of black nationalist critiques of white nationalism in the works of Marcus Garvey, W.E.B. Du Bois, and Booker T. Washington. Although it is common to trace some of the genealogy of critical race theory (CRT) back to Du Bois, the tweeted literary reference by Kaepernick allows us to broaden the historical currents feeding into the situated epistemologies of those persons most marginalized by racial oppression in the market systems that structure NFL production, distribution, and exchange in its multi-billion-dollar culture industry. The analysis finds that we also look to amend wicked problems of the present with a psychological dynamic in looking at how Garvey, Du Bois, and Washington approach the epistemic psychology of Whiteness critically. Garvey's insights lead to the novel conceptual genesis of a (neo-)colonial variant of racelighting. Du Bois's reflections on critically reflective communicative interaction with Whiteness disclose how his interlocutors presume an ethnic framing often quite at odds with their Black counterparts to enact cultural racelighting. Washington's preference for interracial discourse of a purely economic nature leads to a third variant of market capitalist (neo-liberal) racelighting. We lamentably conclude that if the culture industry led by White NFL owners continues its racelighting epistemological framing, there is no reason to expect any substantive systematic change soon. As contemporary macromarketing systems increasingly incorporate and circulate the exchange of documented visual media, the domestic and global spread of the moral outrage will likely escalate tendencies toward more pronounced and informed expressions of athlete social marketing activism.

Introduction

In their Opinion Piece in *Diverse Issues in Higher Education* on 'Racelighting: A Prevalent Version of Gaslighting Facing People of Color,' Harris and Wood appeal to the example of Colin Kaepernick and Trump (2021). They first note that racelighting shares with gaslighting the notion that a successful perpetrator gets the victim to second guess reality. However, while gaslighting is typically communicated from one subjective consciousness to another, racelighting is uniquely systemic. The authors explain the distinction as follows: 'Although gaslighting is usually discussed as occurring at the individual level (i.e., one person to another), racelighting is both systemic and experienced individually' (Harris and Wood).

To illustrate this in the context of the ensuing case study of the Kaepernick, Trump, and Jay-Z narrative to follow, at the level of one subjective consciousness to another, the authors use the NFL example to show that President Trump gaslighted Kaepernick's individual perception of reality. Trump shifted the epistemic framing from the objective reality of police abuse to the very different context of patriotic sentiment. At the individual level, we can even concede fitting instances of Kaepernick questioning his own motives and methods early in the history of his protests, for instance, in shifting the form of protest messaging from sitting to kneeling. However, for the more systemic dimensions to gaslighting that are more in line with the basic tenets of critical race theory, while their clarifying example of Colin Kaepernick is helpful in opening their explanation of gaslighting, they never return to it as a potential manifestation of racelighting.

While Harris and Wood's purpose is to critique the systemic racelighting of critical race theory in American discourses to eliminate its teaching from public education, the task of this paper is to employ the methods of macromarketing to demonstrate that racelighting took place in this instance when Trump shifted the focus from the reality of police brutality to perceptions of patriotism. This social and epistemological shift led many Blacks as a collective racial group to question and critique the message of Kaepernick. This notion of systematic epistemological assault on persons of color is best captured in the critical race theory principle that racism most typically occurs at macro-institutional levels (Kaepernick 2021). The patterned reconstruction of replete micro-aggressions can often escape the direct awareness of perpetrators and victims alike. In setting up the introductory case as laid out by Harris and Wood for further development, we ought to begin with their full account:

> A more contemporary example of gaslighting occurred when former National Football League player, Colin Kaepernick, was widely criticized and lost his career because he chose to kneel during the national anthem in silent protest against racial injustices experienced by Blacks in the United States. Responses by those who opposed Kaepernick's silent protest accused him of being "unpatriotic" and "desecrating a national ritual" while completely disregarding the systemic racial oppression that was the impetus of Kaepernick's protest. Perhaps the most visceral gaslighting response to Kaepernick's actions came from former U.S. President, Donald Trump, who had this to say during one of his rallies: "Wouldn't you love to see one of these NFL owners, when somebody disrespects our flag, to say, 'Get that son of a b**ch off the field right now. Out! He's fired. He's fired!'" The pervasiveness and passion with which these claims were made led some Black people to question Kaepernick's actions. Overall, the tactic of deliberately asserting false information to and about communities of color has been used as a weapon against them—a weapon made even more powerful when they themselves begin to believe them (Harris and Wood 2021).

With this preliminary illustration, Harris and Wood support their opening characterization of individual gaslighting of Kaepernick by Trump as moving toward a systemic racelighting messaging that leads entire marginalized groups to second-guess lived experience (Harris and Wood 2021).

Building upon where Harris and Wood start, we will continue to draw upon the Kaepernick case to delineate three forms of systemic racism into three additional typologies of racelighting. Employing the transdisciplinary framing of critical race theory (hereafter CRT), racelighting takes on overlapping political, cultural, and economic dynamics that undergird its sprawling systematicity. While the conventional approach to CRT is to reconstruct it as a phenomena emerging from legal debates in the late 1980s to mid-1990s, we will offer a much wider historical contextualization back to three major philosophers of post-Reconstruction Black philosophy. Although it is relatively commonplace to trace hints of CRT tenets back to the manifold socio-cultural reflections of W.E.B. Du Bois (Francis 2021), we expand this genealogy. What ensues is a dialectical reconstruction of the historical and philosophical currents informing Du Bois's own reflections on race. While we take liberty to develop a notion of *cultural racelighting* out of the work of Du Bois, we will also highlight strands of *colonial racelighting* from the contemporaneous works of Marcus Garvey and *capitalist racelighting* from the corpus of writings from Booker T. Washington.

In following Harris and Wood's practical appeal to the Kaepernick example to tease out the systematic side of racelighting in accord with macromarketing tenets, our contribution is to redeploy the rich philosophical exchanges between Washington, Du Bois, and Garvey in the spirit of addressing systemic racism as a wicked problem. This allows us to argue that any discussion of racism cannot be fully developed without linking the systems logics of three transdisciplinary movements: the socio-cultural genealogy of racism (Du Bois) back to institutional intersections between colonialism (Garvey) and capitalism (Washington) as visually expressed in Figure 1.

Figure 1: Racelighting as a Wicked Problem in the Works of Black American Sociology
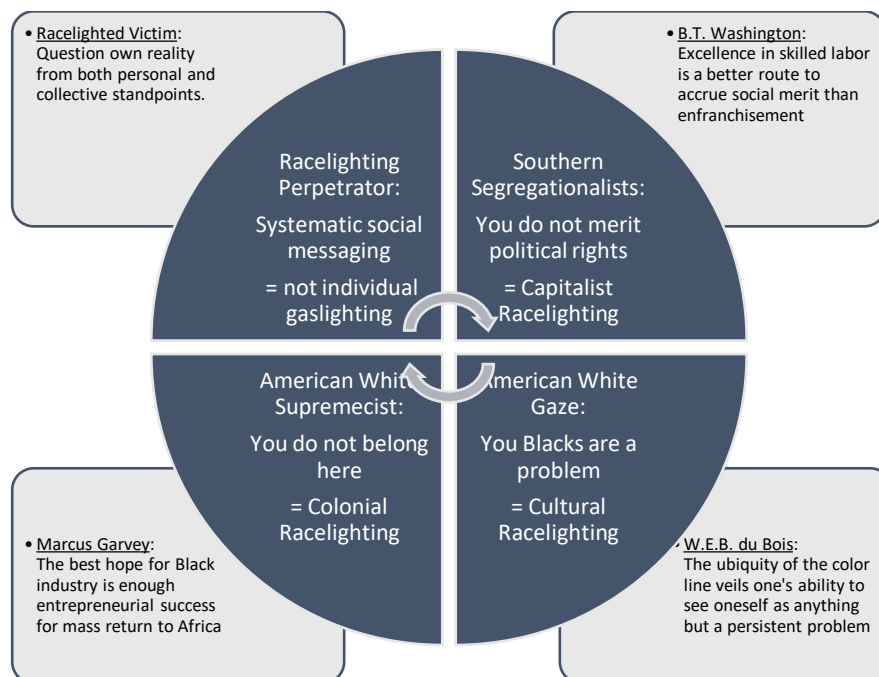
As an initial step in understanding the full force of the contemporary conservative backlash against NFL attempts to reconcile its labor relations with its 70% minority workforce through concessions like the inclusion of a separate Black Anthem prior to games, we affirm recent macromarketing advances as pertain to brokering conviviality and welfare in the context of the superdiversity that characterizes intercultural marketing and public relations (Vorster et al. 2020). There the authors note that acknowledging a minority group's need for recognition through ethnic marketing faces two risks. On the one hand, 'it only represents a certain subset of the marketplace, leaving consumers not targeted by these strategies feeling excluded or alienated' (60). On the other hand, 'emphasis on and/or exaggeration of cultural characteristics—whether intentionally or unintentionally stereotypical—may evoke backlash from consumers targeted by these strategies' (60). As a mediating position between the extremes, we propose looking back to these seminal Black minds, and focusing specifically on how they offer three very different takes on how best to engage in discourse concerning racial reconciliation with White interlocutors. The hope behind such an approach would be to illustrate the internal richness of the Black philosophical heritage to glean insights into at least three systematic forms of racelighting. This is a helpful manner to circumvent the perceived polarization of extremist dualism of White conservative or White liberal perspectives. It offers a richer appreciation of the productive dissent, heterodoxy, and creative conflict running internal to past, present, and future theorizing from Black voices. We also take this as an advance beyond the default colorblindness of stakeholder theory through a concerted commitment to the epistemic supremacy of testimonies of those most immediately affected by structural oppression. Moreover, as a last opening qualification, what might be misconstrued as a domestic debate better addressed internal to US political dysfunction could also be reframed from a macro-social marketing approach considering UN social development goal (SDG) sixteen as pertains to facilitating the inclusion of diverse perspectives to advance peace, justice, and strong institutions (Kennedy and Smith 2022).

Critical White Studies and the Ideal Speech Situation
As an extension of Harris and Wood's characterization of racelighting as both an individual and collective assault by perpetrators on the psychology of the victims (protesting players with labor rights), we want to extend their analysis more broadly to tap into the collective White epistemology of perpetrators (NFL owners). As such, we hope to establish racelighting as an explicit violation of hyper norms of global conduct in its denial of the entitlement of labor to engage in worker advocacy (Laczniak and Kennedy 2011). If we are to develop potential communicative means to disclose the harmful effects of racelighting as a paradigmatic wicked problem (Kennedy 2016), we ought to attempt to enter the tacit psychological assumptions of both sides of prospective modes of dialogue oriented toward exchanges of knowledge. Since even the daily forms of communicative exchange that comprise racelighting will always already take place in institutional contexts with their own situated epistemological nuances, we follow scholars of Critical White Studies to employ transdisciplinary methods that attempt to capture the layered nature of systematic oppression (see Figure 2 below). As our social-psychological lens on Whiteness, we turn to the transdisciplinary sociology of race most eloquently portrayed in Du Bois's seven decades of unrivaled scholarly reflection and activism on these topics (Rabaka 2021). As our colonial lens feeding into the political psychology of Whiteness, we appeal to the corpus of writings and orations of Garvey. And for probing into the psychology of

economic intentions of Whites feeding into the commercial exchanges that aid in racelighting practices, we turn to the teaching, and oration of Washington in his career role of founder and head of the Tuskegee Institute (see Figure 3). So, while Harris and Wood appealed to the Kaepernick example to illustrate the effects of gaslighting on the situated epistemologies of individual victims, our additional contribution is to disclose the epistemological assumptions of White perpetrators in the intercultural framing of these seminal Black minds (Table 1).

Figure 2: Critical White Studies and the Transdisciplinary Epistemology of Whiteness

Racism/Du Bois
(Sociology)

Colonialism/Garvey
(Politics)

Whiteness
(Epistemology)

Capitalism/Washington
(Economics)

Figure 3: The Heritage - A Philosophical and Historical Genealogy of Black Athlete Activism

Kaepernick's 8/30/2019 reply to Jay-Z's announced Roc Nation partership with the NFL demonstrates a dialectical mix of Black Intellectual history and Black Activism as he claims ' Reading always gives me clarity.' The level of intellectual acuity in Kaepernick's thought, speaking, and activism comes from the mentorship, readings, and friendship with Stanford Lecturer Dr. Ameer Hasan Loggins (left of Kaepernick) as their intellectual exchanges came while Loggins got his PhD in African Diaspora Studies at Berkeley and Kapernick took his Pop Culture course

Black Intellectuals and Social Movements
Kaepernick models his activist efforts off of the 1960s liberation movement in Robert Allen's Black *Awakening in Capitalist America (1990)*

The History of Black Activism in Sport
Kaepernick's mentor Professor Harry Edwards organized the 1968 Olympic protests and authored *The Revolt of the Black Athlete (1969)*

Marcus Garvey (1887-1940) was a Jamaican activist, publisher, orator, founder of the UNIA, and strong proponent of successful Black enterprise funding a return to Africa

William Rhoden's *Forty Million Dollar Slaves (2006)* traces Black sports from plantation to present as a neo-colonial enterprise

W.E.B. Du Bois (1868-1963) received his PhD in history from Harvard, was a prominent civil rights activist, and documented all the Black American experiences of the color line

Howard Bryant's *The Heritage (2018)* recommends Black athletes study how patriotism in sport divides along the color line

B.T. Washington (1856-1915) founded Tuskegee University, was raised in the South, and advocated the economic social integration of Blacks instead of civil rights

Michael Eric Dyson's *Made in America (2019)* regards Jay-Z as perfecting a form of Black hustle as distinctly capitalist as it gets

Table 1: Four Communicative Variants on Market-Mediated Political and Economic Integration

Key = (X, Y)
Political Integration with Whites? = **X**—Yes (1) or No (0)?
Economic Integration with Whites? =**Y**—Yes (1) or No (0)?

Responses

Whiteness Epistemology (1, 0)	Du Bois (1, 1)
Ideal Speech Situation: teaching, debating, and discussing tenets of Critical Race Theory an illegal activity tantamount to treason Summary: Since persons of color already live in a colorblind society where all are treated as political equals, there is no need to address structural material inequality; the theoretical template for these guiding assumptions comes from living in a post-racial society that ought to bear no responsibility for past injustices that our nation is beyond (Trump)	Ideal Speech Situation: full inclusion of Black intellectual greats in academic curriculum, especially Reconstruction era philosophy Summary: In terms of the classical is/ought dilemma, the sociological description of how society is suggests widescale systematic political and material inequality; however, we ought to strive for higher ideals of full economic and political integration among Whites and citizens of color if we are ever to create a true republican democracy (Bryant)
Garvey (0, 0)	Washington (0, 1)
Ideal Speech Situation: Garvey noted the irony in finding his discussions with the KKK and White Supremacists as most productive Summary: Given that Blacks continue to live under conditions of colonial exploitation (Fanon), they ought to seek full economic self-sufficiency as communities (nations) within a nation-state under current conditions of White supremacy to one day achieve sufficient political autonomous self-determination to recolonize the African homeland (Kaepernick)	Ideal Speech Situation: the highest ideal a is to be sought out in word-of-mouth commercial exchanges with Whites as the best skilled Summary: In conceding the failures of Reconstruction era efforts at full political integration of persons of color, the most pragmatic route for Southern Blacks is to gain a degree of self-sufficiency in perfecting skilled trades that they then can bring to a society of economic exchanges between Blacks and Whites without full civil rights as a feasible ideal (Jay-Z)

To schematize the multi-level complexity to discourses feeding into any wicked problem with multiple stakeholders that may 'not only add confusion to the problem definition, but also summon myriad interpretations of the focal problem' (Kennedy 2016), the main features social discourse run as schematized in Table 1. We concede that we are creatively deploying the Kaepernick case by extracting Kaepernick, Trump, and Jay-Z as our primary points of focus that have sacrificed some complex nuances for the sake of conceptual parsimony. On a very general

characterization, we employ Trumpism as the paradigmatic expression of an epistemological framing of reality through a very myopic lens of Whiteness in cultural, political, and economic strands. This leads to the communicative assumption that any privileging of marginalized groups is akin to a reverse racist assault on White hegemonic normativity. Here lies the uncanny rhetorical flourishes of Trumpism. Culturally, its epistemological framing of public discourse views Whiteness as impartial, fair, and even patriotic with the convenient assumption that persons of color have already achieved full political integration to justify structural exclusion from real economic exchanges among political equals. Its political persona thus can quickly morph to a neo-colonial logic of strategic might makes right, hyper-masculinity, and appeals to law and order as the bridge between White procedural justice and political realism (Kaepernick 2021). Economically, appeals to the logic of the free market as a meritocratic order regard any concession to historically systematic patterns of material justice as an affront on White merit.

In tracing out the genealogy of Kaepernick's communications with the NFL and owners, his approaches come closest to those associated with Marcus Garvey. As we will see in a focal Kaepernick tweet to follow, he views any attempts to cooperate with White NFL owners on matters of economic exchange as complicity with their neo-colonial efforts to continue to profit off Black bodies, minds, talent, and labor. As far as hopes for Black political integration into the American democratic republic, like Garvey, Kaepernick views the repeated White rhetoric of reform toward progress as an excuse for maintaining a status quo of systematic oppression— specifically in the domain policing and surveilling Black bodies (Kaepernick 2021).

As something akin to the Black counterfoil to Kaepernick's activism would be the strategic alliance forged between Jay-Z, Roc Nation, and the NFL. For our purposes, we associate Jay-Z's emphasis on economic exchange and individual entrepreneurship as the contemporary manifestation of B.T. Washington's priority on economic integration as the cost of more comprehensive civil rights to political participation. Jay-Z offers the quintessential narrative of Black achievement of the American Dream through Washington's ideal of diligent disciplined labor. Jay-Z also manifests Washington's highest ideal of word-of-mouth referencing of Whites soliciting elite talent in the music, entertainment, and culture industries.

As the contemporary proxy for Du Bois's calls for pursuing both full political and full economic integration into a multi-national republic, the contemporary work of journalist and author Howard Bryant will offer the best approximation of Du Bois's ideals as pertain the relevant case study of Kaepernick, Trump, and Jay-Z. Bryant's *The Heritage: Black Athletes, a Divided America, and the Politics of Patriotism* (2018) places the cultural racelighting of Kaepernick (and Reid) within a wider heritage of racelighting as an one abiding constant of American sport history. In addition, as a communicative ideal behind Bryant (and Du Bois's) ideal speech situation between Black athletes and their White political and economic counterparts entail a deep intellectual dive into what Bryant calls a responsibility to learning, studying, and living 'the Heritage' of athlete activism in the United States. Since it is this latter category most in need to deeper explanation and development, we turn to a brief reconstruction of that heritage in terms of the new categories and major players introduced up to this point.

Towards a Black Philosophical Genealogy to the Heritage of Athlete Social Activism: Tracing Origins Back to the Washington, Du Bois, and Garvey Dialectic

In one of the rare elite transdisciplinary journal treatments of race as pertains to (macro) marketing and political economy in the United States, Crockett and Wallendorf investigate the role of normative political ideology in along three categories: Black liberalism, disillusioned liberalism, and Black nationalism (2004). As such, we need the preliminary disclaimer that such a taxonomy is typically avoided by more orthodox CRT scholars in their overt rejections of liberalism as impartial. In complementary pieces from Marston (2021; 2017), while they differ slightly, he also appeals to the pioneering work of Dawson on the history of Black political ideology in the construction of a parallel taxonomy (2001). As for the common theoretical genealogy, each of these streams of research first describe Black liberalism as an offshoot of traditional colorblind liberalism (in the academic sense of John Locke, Alexander Hamilton, and The Federalist Papers) that celebrates individual liberty, basic rights, moral equality, and the inherent dignity of the person.

Marston, Crockett, and Wallendorf all agree that the major points of differentiation between classic liberalism and Black liberalism would be the greater concession amongst the latter on the necessity of ethnic social solidarity, ethnic ties feeding into one's individual identity, and a much tighter relationship between liberty and equality than classic colorblind liberalism would concede (L'Ouverture and Aristide 2008). Likewise, all three writers concur on a greater tendency of Black liberalism to depart from the racial colorblindness of classical liberalism. They provide sound empirical support behind their shared commitments to the view that racial inequality has historically hindered Black liberal progress (Henderson, Hakstian, and Williams 2016).

At the other extreme of the spectrum, Crockett and Wallendorf posit Black nationalism as an explicit political ideology of regarding Black communities in the United States as bound by group double-consciousness (Johnson 2017; Du Bois 1996). The dual identity is best described as akin to simultaneously inhabiting a nation within a nation. The general idea would be to accept and concede the systemic fault lines that race inhabits within the United States as proving to be something much less than the melting pot so often taught in U.S. elementary, middle, and high school. As a minority community embedded within a White culture, Black nationalists believe in preserving—by not ignoring—a shared colonial heritage that ought to strive towards an ideal of autonomous self-determination. These measures include striving for fully sustainable and self-sufficient economic communal infrastructures, Black-owned industries of commerce, and consumption patterns reflective of a discerning embrace of this political identity.

In between Black liberal and Black nationalist extremes, the third group they characterize as disillusioned and/or disenchanted Black liberalists. This mediating position tends toward an ideological bent more skeptical than Black liberals of the consummating ideal of full cultural integration of Blacks within the wider U.S. national culture of an unspoken White majoritarian sentiment. Crockett and Wallendorf characterize this group as disillusioned in the sense that they may have at one point held some optimism toward full integration but when that ideal was not achieved, there was a retroactive revision in mindset. However, the collective disenchantment does not lead to full resignation as they still seeking greater degrees of liberal political integration in domain of basic rights, social participation as equals, and democratic inclusion in decision-making.

This effectively melds the narrative and pedagogical lessons into what Howard Bryant, in the domain of the history of the Black sports culture industry, calls the heritage of the Black athlete in the U.S. It comprises a historical pedagogy that encourages every Black athlete to share a collective responsibility in learning, understanding, and transmitting on models of reproducible leadership by exemplary praxis (Bryant 2018; Edwards 2017). Along these lines, second-generation sport anthologist Renford Reese offers a concise reconstruction of the varying social contexts contributing to the heritage of sport (dis)integration in the United States (1998). Most pertinent to our present purposes, we will follow Reese in adapting the major typologies of liberalism as emphasized by Crockett, Wallendorf, Marston, and Dawson as they pertain to our consummate focus on rooting theory in major cases, events, and figures in the history of the intersections between sport activism and race in the U.S. In a distinctive melding of the narrative and epistemological (paying homage to his father as the first Black sports journalist to write for a major newspaper in the South in Atlanta), Reese summarizes his brief reconstructive history of integration with a taxonomy he developed through years of discussion with his father. It effectively lays out a working schema of major Black sports figures in the history of the United States up to the close of the 20th century (1998). Their reconstruction runs as follows: liberal conservatives were nonthreatening to the system by abstaining from opinions regarding racism (Joe Lewis, Willie Mays, O.J. Simpson, Hershel Walker, Evander Holyfield, Marcus Allen, and Michael Jordan), race-conscious (Crockett and Wallendorf's 'disillusioned') liberals were respectful of their culture but did not engage in overt activism (Jackie Robinson, Ahmad Rashad, Kareem Abdul-Jabbar, Wilt Chamberlain, and Doug Williams), and activist Black nationalists were known to confront racism publicly to different degrees of radical expression (Arthur Ashe, Mohammed Ali, Curt Flood, Jim Brown, Bill Russell, Tommie Smith, and John Carlos).

While Crockett, Wallendorf, Marston, Dawson, and Reese do offer hints at tracing their taxonomies back to the earliest stages of U.S. history—particularly the liberal strand—they also note that the other two strands really came to the fore with the Reconstruction era following the Civil War. In treating them now in reverse order, we must add yet another layer of illustrative industry examples from the three centuries of sport history of the Black athlete in the U.S. that date back to the advent of sport for the colonial entertainment and status display of competing plantation owners (Rhoden 2006). To this, we can also overlay the athletic heritage with a lesser-known heritage of epistemic apartheid (Rabaka 2010), insofar as the variable historical contexts bore witness to the emergence of equally monumental 'Heritage' of Black minds that materialized from the same crucial context of Reconstruction era history (see Figure 3) that reverberates in Kaepernick's present contributions to that long heritage.

Firstly, at the radical extreme, the conflation of U.S. Reconstruction sport and associated Black intellectual schools, led authors and commentators to make the direct identification of Marcus Garvey and his United Negro Improvement Association (UNIA) with the heritage of Black nationalists that became profoundly disillusioned with the Reconstruction era shortcomings in advancing the economic, cultural, and political welfare of Blacks in the United States (Garvey 2014). With the home office of the UNIA in New York, Garvey played a huge role in the Harlem Renaissance of the 1920s and 1930s, encouraging Blacks to inculcate distinctive culture forms of art, music, entertainment, and commerce publicly to embrace the dual identity of a nation within a nation (Garvey 2004). Reese and Rhoden note that Garvey, while himself not greatly

successful as an entrepreneur, held an enormous intellectual influence on the history of the evolution of the heritage of Black athletes in the U.S. In the context of baseball, Fleet Walker, was the first Black major leaguer in baseball history in 1884. He has since been subjected to epistemic apartheid as all but forgotten outside the heritage although he presaged Jackie Robinson by 63 years (Rabaka 2010). While Walker was treated well by his White teammates, the contrasting vitriol he frequently faced by opposing fans led him ultimately to become a radical advocate of Garvey's Back to Africa movement (Rhoden 2006). Rhoden notes that 'By 1919 the violence directed at African Americans had reached genocidal proportions' (109). This bloodiest year of racial violence that the U.S. had seen since emancipation was, for Rhoden, also a turning point in the fusion of growing Black nationalism with cultural enterprise through sport.

The violent and racist narrative faced by Fleet Walker became an important factor in the 1920 success of an even more egregious instance of epistemic apartheid with the epistemic erasure of perhaps the most important and successful figure in the history of Black sport in the U.S., (un)known as The Father of Black Baseball: Arthur 'Rube' Foster (Rhoden 2006; Rabaka 2010). As a former professional pitcher, he founded an economically viable alternative to Major League Baseball through the appeal of a faster, more entertaining Negro baseball league as commissioner, manager, marketer, and team owner (101). The Garvey-inspired model was owned, managed, organized, marketed, and played by African Americans reaching its height of popularity between 1943 to 1946 (Rhoden 2006), only to begin to crumble with Jackie Robinson (re)breaking the historic segregation barrier in 1947.

Marston associates the contextual emergence of the strand of disenchanted liberalism with Garvey's longtime ideological opponent and intellectual contemporary W.E.B. Du Bois (Marston 2017). The beginning of his prominence comes with Du Bois's rise to founding leader of the National Association for the Advancement of Colored Peoples (NAACP), assuming the role of editor of its monthly periodical *The Crisis: A Record of the Darker Races*. While Du Bois devoted relatively little writing to sport in his major academic works, with his romantic notion of the "saga of Blacks' second-sight," Du Bois draws upon the disillusionment of the Black experience of apartheid, colonization, slavery, and genocide (Francis 2021). This ability to see 'behind the veil of the color line' makes an epistemic virtue of the unique capacity 'to see both Africa (the Black world) and America's (the White world's) strengths and weaknesses, and the ways in which these two worlds could and should learn from and, even more, aid each other' (Rabaka 2015; Bryant 2018; Rhoden 2006).

As for his limited reflections on sport, we do know from a crucial debate Du Bois chronicled in *The Crisis* that he publicly supported students at his *alma mater* Fisk University in protesting the elimination of its intercollegiate athletic department. This administrative decision came after the 1919 cessation on athletics ended at the close of WWI. The administrative justification was driven by the chancellor's desire to placate Northern White donors that saw intercollegiate sport as corrupting education. This was due to sports' growing Northern propensity to accompany gambling and to lead to the elicit recruitment of top Black athletes for pay. In *Crisis*, Du Bois chronicled the protest of 6 students and rebuked Fisk's suspension of 4 students in calling them martyrs in a front-page headline. While Fisk responded by vowing to continue intramural athletics and called for students to play the empowering dual role as coaches, Du Bois justified his support for the reestablishment of the athletic department on three main grounds. Firstly, he

resisted the political notion of White donors wielding authority over Fisk administration and its students. Secondly, he placed the student demands for competitive athletics on equal par with expressive artistic freedom against authoritarian discipline, as one might likewise find in the student newspaper and student government as socialization outlets for free speech and free expression (Anderson 2006, pp. 35-36). Thirdly, not only did he regard the development of bodily and mental strength as mutually reinforcing, but he also began to see sport in its potential as an elevated cultural expression of Black soul (Du Bois 1996) and style with political resonance (especially activism against segregation).

As for the last of Crockett and Wallendorf's groups, the Black liberal, we could also point to the other contemporary and major ideological rival of Du Bois on another end of the political spectrum with Booker T. Washington as founder of the Tuskegee Institute. As crucial points of differentiation concerning their competing views on education and the role of sport, Du Bois disagreed with Washington's views of education as primarily vocational. Since the conservative leanings of Washington saw play as an idle pursuit potentially leading to lack of discipline and degradation of character, he openly commented that he had no favorite sport nor did he have any care for them. Insofar as Washington was indebted to a conservative base of Northern White donors that thought likewise, he regarded their ongoing support for his programs of rigorous discipline through minimal leisure as essential for Black Southern school identity and distinctive branding. As such, Tuskegee was a predominately Black trade school founded by Washington in Alabama with the aim of working toward cultural integration in the Reconstruction era South through the economic means of a distinctively conservative variant of Black liberalism (Washington 2020). Washington, as Du Bois's leading intellectual rival of the time, went as far as reversing Du Bois's educational platform and branding of the ideal Black college as not in the business of espousing or teaching racial political equality. Washington openly discouraged the extension of antebellum voting rights to Blacks in the South and wedded his model for adolescent socialization on the meritocratic ideology of White neo-liberalism. As such, for Washington, the overt purpose of Black vocational schools in the Tuskegee model was for Black tradesmen to prove their worth to White communities through their economic contributions as the best means for social (but not full political) integration (Washington 2000).

Washington's utter lack of interest in sport and mere fifteen minutes per day allotted to recreational leisure allowed the tight Tuskegee variant of conservative Black liberalism to spill over indirectly as a competing pressure against progressive counter currents pushing for sport racial integration. Reese refers to the prominence of Washington as one rationale behind the lack of demands for equality from most Black athletes from the Reconstruction era. Reese traces this cultural lineage all the way up to Jackie Robinson's (re)breaking of the color barrier in baseball in 1957. As a concrete example of the spirit of Washington's teaching in practice, under the characteristic logic of liberal instrumentality, the abiding rationale behind even the selection of Jackie Robinson (contrary to Reese's taxonomy) could likewise be viewed as stemming more from the market-based model of interest convergence than disillusioned Black liberalism (Smith and Hattery 2020, p. 179). On this view, if the grooming and strategic choice of White owners eager for Black talent on their teams derived from a liberal market mindset, sport integration is not driven by strictly comparative measures of talent (there were better Black players than Robinson at the time) but also by other economic factors, such as how Robinson's his calm

demeanor, decent education, and obedient character would be perceived by the White consumer base of fans (Bryant 2018; Rhoden 2006).

Kaepernick's Reference to Allen's *Black Awakening in Capitalist America* (1990): Kaepernick (Garvey) Calling Out Jay-Z as the Middle-Man (Washington)
In returning to the opening illustration of the Kaepernick and Trump dynamic, we see a clear instance of *cultural racelighting* by appeal to the disproportionately White salience imbued to patriotic virtues (Sorek and White 2016) and of *colonial racelighting* in so far as Kaepernick's own published works have made convincing ties between the colonial legacy of slavery and the historical origins of American law enforcement (Kaepernick 2021). However, as far as Kaepernick is concerned, the most pernicious form of racelighting employed by White NFL owners is *capitalist (neo-liberal) racelighting*. This form of reality distortion comes to Kaepernick with the threat of making a commodity fetish out of Black excellence in sport, entertainment, and culture industries.

In foreseeing the inherent threat of White owner infatuation with market growth, revenue increase, and viewership ratings, Kaepernick saw the Jay-Z and NFL partnership as a step in the wrong direction. It took Kaepernick a week to respond to the NFL announcement of its new partnership with Jay-Z. In a short and direct response to Jay-Z as employing a tandem of colonial gaslighting in diverting the focus away from police brutality with the capitalist gaslighting aim of securing marketing access to a more diverse portfolio of entertainers of color. In address the former, Kaepernick first tweeted a picture of solidarity and a message of care and support for his brothers still kneeling during August 2019 preseason games even in the face enduring repeated death threats. The second tweet in its direction to the latter, was lost in the haze of consumer reactions to the Roc Nation announcement, its flurry of backlash and support, and rush of speculation over whether a signing of Kaepernick to a team was part of a Black liberalist deal Jay-Z had brokered.

In this second deeply reflective tweet, he posted a Twitter shot of a highlighted paragraph from R. L. Allen's disruptively titled *Black Awakening in Capitalist America* (1969) with the short comment 'Reading always gives me clarity.' In the larger context of the manuscript and its themes, Allen pays continual tribute to Washington (Allen 1990), Du Bois, Garvey, and others in noting their respective roles in contributing to stages, nuances, and variations of Black nationalism (see Figure 4 below). Note that Allen's highlighted remarks on the displayed page are a Civil Rights era radical critique of the methods and motives of CORE (the Congress on Racial Equality), as it was founded in 1942 at the University of Chicago on a platform of pacifist racial reconciliation. That pacifist platform made it a social movement that eventually matured into a key player in the 1960s civil rights movements, forming strategic corporate alliances among major urban industries (like Ford) on the hopes that CORE might be able to silence a growing number of urban social movements, including many that erupted out of direct concern for excessive police use of force in attempts to break up public protests. What Kaepernick found as a timely critique already advanced almost 50 years prior saw Black intellectual nationalists warning those persons of color most affected against the same strategic deployment of the racelighting neo-colonial opiate of promises for progress through the strategic placement of Black middle-class politicians as extensions of the White interest in keeping impoverished poor

urban Blacks from rebellion against police violence. With the politicization of White fears over late 60's urban race-related violence between impoverished Blacks and law enforcement officials, the Ford Foundation sought to extend its corporate influence into quelling the violence, particularly in American urban centers that housed its largest manufacturing plants. In other words, in contrast to the CRT epistemic priority of those most adversely affected, they were encouraged to remain submissively patient for the future hope of a better tomorrow that, fifty years later, is still yet to come (Kaepernick 2021). However, in strategic exchange for the Ford Foundation in the 1970s utilizing its corporate resources and influence to maintain the status quo, this time it is the corporate might of the 32 NFL owners, with Jay-Z—their new entertainment and marketing manager—to play to capitalist racelighting role of pacifying peace-enforcer by offering better (more profitable) mass marketing entertainment.

Figure 4: Kaepernick's Analogy—Jay-Z Is to Black Proxy Leaders as the NFL Is to CORE

When rereading the tweet above in its multi-layered temporal valence, for yet another contemporary application, we can substitute Jay-Z's Inspire Change social justice initiative as

the corollary to CORE mass marketed peace under the guise of public outreach. In short, Kaepernick believes that the capitalist motives driving Jay-Z's complicity with the White colorblindness of the NFL, its owners, and the newest wave of the pacifying American culture industry (Hylton 2010), will call it progress by simply inserting piecemeal reforms like the new ritual of including the Black anthem, the sale of themed racially conscious jerseys and apparel, and providing the most relevant and lucrative Super Bowl entertainment from performers of color to continue to support White owner interests and revenue (Montez de Oca 2021). Like Garvey, Kaepernick questioned whether better and more engaging entertainment would ultimately help those born Black and poor, most often facing premature death at the hands of White law enforcement in moments of greatest vulnerability, with military service openly marketed to them (through the allure of professional sport) as their best hope in a trade of their bodies for an exit to systemic poverty (McCain and Flake 2015).

Concluding Lessons for Intercultural Marketing in Superdiverse Society: Learning from a Half-Century Heritage of Racelighting Black Athlete Activism
We ought to conclude by echoing Harry Edward's abiding sentiment as pertains to the Bryant's heritage of Black athlete activism: 'Those who do not learn from history are bound to repeat it' (2017, xi). Edwards brought up this claim in the context of his lack of surprise at the astounding effectiveness of the social marketing activism of Black athletes at the University of Missouri threatening to boycott its November 2015 football game against BYU for unaddressed campus patterns of systemic racism (Bryant 2018). The mere tweet of their collective solidarity led in just two days to the immediate dismissal of its President Tim Wolfe (Edwards 2017). Edwards made this claim insofar as he was able to organize a similar game boycott with a very similar response at what was then San Jose State College 48 years earlier in 1967 (ix-xi).

As complement to Edward's more radical stances on Black athlete activism, Howard Bryant makes carefully reflective notes to contextualize the Kaepernick moment within the broader political backdrop of the post 9-11 propagandizing of sport with patriotic ritual. This period runs from George Bush's World Series pitch in October 2001 up to the McCain-Flake expose of 'paid patriotism' as the outcome of a 2015 investigation into pork-barrel government spending (McCain and Flake 2015). McCain and Flake disclosed $7 million dollars in paid anthem displays to major American sports leagues by the Department of Defense, at taxpayer expense, for the purposes of marketing recruitment that the NFL (as the major beneficiary) masked as voluntary public outreach in its Salute to Service efforts (akin to the reiteration of this pattern in its Inspire Change mix of public outreach and strategic marketing).

This wider backdrop helps explain the rationale behind the NFL's amplified racelighting efforts in response to Trump's observations that Kaepernick's displays were hurting the NFL ratings and brand. As the NFL discreetly admitted to collusion in a February 2019 settlement of up to $40 million with Kaepernick in violation of its collective bargaining agreement with its players' association (Rische 2019), its efforts toward rebranded communal outreach included staging a more diverse array of entertainment influencers by signing with Jay-Z and Roc Nation six months later (see Figure 5 for the more comprehensive timeline). The most immediate rationale for the NFL's deal with Jay-Z was directly related to Kaepernick's influence. The NFL struggled to sign A-list entertainers to headline its February 3, 2019, Super Bowl LIII with most entertainers of color opting out in labor solidarity with Kaepernick and his cause.

Figure 5: A Visual Timeline of Half-Century Heritage of Racelighting Black Athlete Activism

10/16/68	10/30/01	11/04/15	09/01/16	09/24/2017	08/17/19	02/02/20	08/23/20	10/20/21
John Carlos and Tommy Smith raise fists in a Black Power salute during the playing of the national Anthem at the 1968 Mexico City Olympics Smith and Carlos were encouraged and supported in their actions by academic and civil rights activist Harry Edwards	President Bush throws out the first pitch in Game 3 of the World Series in New York This was a symbol of courage and patriotic pride after a day of visiting the World Trade site post 9/11/01 and began a new era of sport and patriotic displays	Senators McCain and Flake (both AZ-GOP) slam Pentagon for spending $6.8 million to the NFL and other sports for 'paid patriotism' Kaepernick was by no means the first actor in politicizing the NFL as it was complicit in these paid post -9/11 marketing rituals	Kaepernick kneels along with teammate Eric Reed in their last preseason game Kaepernick went from sitting to kneeling after a discussion with former Green Beret Nate Boyer after Boyer wrote an open letter to stop kneeling in the 08/30/16 *Army Times*	As the protests continue more than a year later and without Kaepernick on a team, President Trump tweets that NFL ratings are down due to the protests former Vice President Pence leaves a Colts home game against the 49ers three weeks later when players kneel	The NFL announces its partnering with Jay-Z's Roc Nation to focus on entertaining efforts and social justice initiatives Jay-Z takes the meritocratic stance of the Black entrepreneur in calling to 'move beyond kneeling' and into the bargaining suite for productive change	Jay-Z catches some brief media attention for sitting during the playing of the Anthem along with his seated wife and daughter at Superbowl LIV When asked if it was a protest, he said he was 'working' and that the all Latina Anthem and halftime was the loudest protest of all	Following the May 2020 murder of George Floyd and a summer of protest, Goodell issues his first public exchange with Kaepernick since a 2/18/19 $20 million settlement for collusion Goodell admits fault: 'I wish we would have listened sooner' as the shift in focus to patriotism racelighted the QB's real reasoning behind kneeling	The NFL settles with Black retirees to qualify for the $1billion concussion claims In a league of majority Black players, its Black retirees were less likely to demonstrate sufficient mental decline as they were race-normed to start at lower cognitive levels than White counterparts

Jay-Z's rationale for heeding their call was that after 3 years of player protests, the movement needed to go beyond kneeling. Jay-Z positioned himself as making the move from protest as an outsider to activist as an NFL insider with rumors of positioning him (a billionaire) to become the first Black owner in the NFL at some unknown future date. Since then, the NFL has steadily incorporated Roc Nation as an ally in its more public albeit highly orchestrated 'Inspire Change' initiatives for advancing racial equality (Bryant 2018; Rugg 2020). As such, the NFL has continued to adapt its racelighting strategies towards Kaepernick's protests as they have even begun to coopt NFL player activists into their overt branding strategy from the 2020 season to the current middle of the 2022 season (Bryant 2018; Montez de Oca 2021). As of the onset of the 2019 season, around the time of the 2019 collaboration announcement with Jay-Z, most of the 32 owners of the NFL still condemned Kaepernick's protests as bad for the NFL brand, led by Roger Goodell, the Commissioner of the NFL. Goodell, in initial complicity with Trump's promotional teams that tracked public sentiment of the NFL viewing audience, imposed fines against players and teams engaged in such anthem protests and instituted league-wide policies that mandated standing during the anthem, with the qualified option for players to stay hidden in locker rooms until the close of the anthem, if opting against standing.

Jay-Z's rationale and justification seems most closely to align with the strand of Black liberalism (ala Washington) that seeks out a seat in the boardroom to negotiate steps of interest convergence among affected stakeholders to continue along the linear march to increased revenues in a trickle-down economic logic (Dyson 2019a; Dyson 2019b). Jay-Z already has to his credit an impressive record of success in working with the NBA in its branding through his co-ownership and financing of the move of the New Jersey Nets to the impoverished urban streets of his native home, Brooklyn New York (Carter 2011; Oates 2020). Jay-Z has the social capital required to pull off successful Super Bowl halftime entertainment along with a network of

performers to draw upon as the NFL incorporated the Black Anthem. Jay-Z even caused a bit of stir at the 2020 Superbowl as he and his wife Beyonce sat during the playing of the Anthem along with their young daughter. His response was that he was 'working' as he was focused on possible adjustments needed to the audio with the real 'protest' being his fully Latina line-up of star singers for the Anthem and Superbowl (Demi Lovato, Shakira, and Jennifer Lopez).

In a turn of irony for those sensitive to placating contemporary public sentiment only noticed by the likes of Bryant as a student of the 'Heritage' (2018, pp. 6-7), the initial August/September 2016 public outcry against Kaepernick came in the immediate context of nation-wide mourning of the June 2016 death of Muhammad Ali whose refusal to serve in Vietnam was a monumentally unpopular turn in the late 60s civil rights movement. Sadly, as sentiments always shift more than principles, it took the May 2020 murder of George Floyd to stir on the staged August 2020 public apology of NFL Commissioner Goodell to Kaepernick as another iteration of racelighting. Goodell's astute marketing tracked public sentiment and recognized the increasing power of athlete activists of color that brought every major American sports league to a halt (except the NHL). Goodell is quoted stating: "I wish we would have listened earlier, Kaep, to what you were kneeling about and what you were trying to bring attention to" (Selbe 2020). But then in a classic racelighting twist, Goodell subtly shifts reality and places the implicit fault on Kaepernick: "We had invited him in several times to have the conversation, to have the dialogue. I wish we had the benefit of that, we never did. We would have benefited from that, absolutely" (Selbe 2020).

As for the latest development of the NFL's seemingly ceaseless heritage of racelighting, the candid conclusion of this analysis is that we have no reason not to expect more of the same. As support for this lamentable state, our final most recent case precedent shows the confluence of *cultural racelighting, colonial racelighting, and capitalist racelighting* in their newest corporate, technological, and legal manifestations. In sum, an an explicit victory in realizing the hyper norms of global codes of conduct that grant stakeholder entitlement to worker advocacy, the rights of corporations never to trump those of persons, and the right of labor to have their voice heard (Laczniak and Kennedy 2011), an October 2021 settlement with Black NFL retirees found that many had been disproportionately denied claims to access the NFL's $1 billion concussion settlement monies that White retirees had little trouble getting processed. The settlement found that Black players were race-normed by the algorithmic determination of settlement eligibility. In an overt transgression of the hyper norms of global codes of conduct prohibiting workplace abuse (Laczniak and Kennedy 2011), Black players were presumed by the algorithm to have begun their lives at a lower cognitive level. They in turn were judged to have not met the sufficient degree of cognitive decline to justify payment since the default for Whites was automatically set higher that allowed for greater quantitative 'measured' decline post retirement. Cultural racelighting recurs here with Whiteness as meriting automatically higher initial thresholds for intellectual ability. Colonial racelighting recurs with post-CTE awareness participation of White youth in tackle football on the decline, while Black minds and bodies for colonial exploit have shown no decrease in participation (thus leading to an even more Black future NFL to exceed 70%). Capitalist racelighting recurs in this case insofar as the former players and their families continue to fight costly legal battles for reassessment while White retirees have already received their due compensation for mental, physical, and psychological loss. However, as the Heritage continues to mold new athlete social marketing activists testifying

to new injustices from the 1967 S.J.S.C. boycott to the 2015 University of Missouri one, the White timeline for not conceding a systemic pattern is objectively on the wrong side of the historical color line.

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Externalities Track

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Exploring Controversy and Emblematic Externalities Through Psychedelic Markets: When Rules Change, So Does Meaning

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"It seems like a lifetime, or at least a Main Era — the kind of peak that never comes again. San Francisco in the middle sixties was a very special time and place to be a part of. Maybe it meant something. Maybe not, in the long run... but no explanation, no mix of words or music or memories can touch that sense of knowing that you were there and alive in that corner of time and the world. Whatever it meant...There was madness in any direction, at any hour. You could strike sparks anywhere. There was a fantastic universal sense that whatever we were doing was right, that we were winning...
And that, I think, was the handle — that sense of inevitable victory over the forces of Old and Evil. Not in any mean or military sense; we didn't need that. Our energy would simply prevail. There was no point in fighting — on our side or theirs. We had all the momentum; we were riding the crest of a high and beautiful wave...
So now, less than five years later, you can go up on a steep hill in Las Vegas and look West, and with the right kind of eyes you can almost see the high-water mark — that place where the wave finally broke, and rolled back."
— Hunter S. Thompson, Fear and Loathing in Las Vegas, 1972

Introduction

This extended abstract presents a scoping review (Mays et al. 2001; Munn et al. 2018) and initial exploration into emblematic externalities occurring through the burgeoning legalisation, commercialisation, and subsequent marketing of psychedelics (World Drug Report 2021) and also sets an agenda for further research on this topic. While medical researchers may focus on health outcomes and political scientists may focus on policy development, this extended abstract looks specifically at the emblematic and cultural externalities of psychedelics in the marketing domain. As will be explored further, the fracturing of associations in meaning act at a subtle level, making this shift truly unaccounted for – an externality (Padela, Wooliscroft, and Ganglmair-Wooliscroft 2021).

Blanchet and Depeyre (2016) present knowledge as performative, in that the development of expertise on a market actively shapes and transforms the market itself. In the case of commercialising psychedelics, there are multiple streams of expertise both clashing and converging - clinicians, entrepreneurs, policymakers, researchers, investors, advocates, and 'psychonauts' to name a few — each with vested interests in commercial, economic, political, personal, or social outcomes.

As a knowledge synthesis regarding a controversial topic, this extended abstract aims to contribute to the discussion of conflicting practices in markets (Blanchet and Depeyre 2016) with a view to excavate cultural externalities at the level of meaning-making and discourse. While

conventionally, there may be a tendency to focus on controversies surrounding practical, material concerns such as bodily harm or environmental harm (Blanchet and Depeyre 2016), the process of commercialisation also brings externalities in terms of collective meaning making and cultural influence (Padela, Wooliscroft, and Ganglmair-Wooliscroft 2021).

As such, this article aims to both identify a research gap and begin to explicate emblematic externalities within psychedelic and psychedelic-influenced markets. This work contributes to discussions on the role of governmental interaction with market players in shaping markets (Wiebe and Mitchell 2023) and also provides a novel perspective by considering both positive and negative externalities — the unaccounted-for costs and benefits of exchange (Mundt 1993), within the controversial product category (Blanchet and Depeyre 2016) of psychedelics.

Research Approach

Scope And Span: What Are Psychedelic Markets?

Psychedelics are a group of psycho-active substances which produce hallucinatory effects in those who ingest them (World Drug Report 2021). The term psychedelics is often used interchangeably with hallucinogens, dissociative drugs, and more recently entheogens (World Drug Report, 2021). From a neuroscientific perspective, when taken in acute or sub-acute doses, psychoactive substances act on several neurological facets including reasoning, creativity, attention, recall, and social cognition (Bălăeţ 2022).

For the purposes of this article, the topic of psychedelics has been delineated according to the World Drug Report's (2021) description of psychedelics or hallucinogens as substances which produce different hallucinatory effects and alter the users' state of consciousness. These substances include psilocybin mushrooms, d-lysergic acid diethylamide (LSD), hallucinogenic amphetamines, mescaline, and phencyclidines (PCPs), and some New Psychoactive substances (NPS) (World Drug Report 2021). In some cases, cannabis is cases included in the category of hallucinogens, and in other cases it is excluded (MAPS 2018; World Drug Report 2021). As such, articles on cannabis are only included in the scoping review only where the subject of the paper holds further relevance to externalities or marketing involved in cannabis as included in the category of psychedelics.

Here, the commercialisation of psychedelics is addressed as a marketing system following Layton's (2007, p.230) definition of marketing systems as "…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." Given the contextualising of his product category within emblematic externalities, symbolic applications of psychedelic-associated ephemera are also included within this scope.

Method: Scoping Review

This extended abstract scopes the body of literature on the marketing of psychedelics and identifies a gap as a precursor to further study (Munn et al. 2018). As a result of the scoping review, a brief history of psychedelic markets is provided alongside preliminary discussion of emblematic externalities in psychedelic markets.

An initial search on Scopus for "marketing and psychedelics" produced limited results (Table 1, p.5). Therefore, following Mays et al. (2001) instructions for scoping reviews, a scoping review was conducted to identify a gap in knowledge and inform further analysis (see Table 1, p. 5 for a record of databases and search terms). Due to the small quantity of extant literature on the topic in question, no limitations are applied regarding time of publication. From an initial return of 1303 articles, 369 abstracts were read, and 27 articles were included in the review. Following review, reference lists of included articles were also scanned and reviewed where relevant (Mays et al. 2001). As per Mays et al. (2001) instructed method for scoping reviews, materials were included or excluded based on both relevance and quality of evidence. Of the limited extant research on the marketing of psychedelics, many reviewed results originated within the disciplinary bounds of public health and drug policy or anthropology but were relevant to the topic in question with only three articles originating in marketing journals (see Table 2, p. 6).

Table 1. Scoping Review Search Terms – Marketing psychedelics

Search terms (Title, abstract, author specified keywords)	Database	Number of results
marketing AND psychedelics	Scopus	103
marketing AND psychedelics AND externality	Scopus	0
marketing AND psychedelics AND controversy	Scopus	2
Selling AND psychedelics	Scopus	28
marketing AND hallucinogens	Scopus	60
marketing AND psychedelics	Business Source Complete	24
marketing AND psychedelics AND externality	Business Source Complete	0
marketing AND psychedelics AND controversy	Business Source Complete	4
Selling AND Psychedelics	Business Source Complete	11
marketing AND psychedelics	Wiley	1034
marketing AND psychedelics AND externality	Wiley (Business)	32
marketing AND psychedelics AND controversy	Wiley	7
Total returned		1305
Abstracts read		369
Items included		27

Table 2. Scoping Review – Disciplines of reviewed research

Research Discipline:	Marketing	Public health and policy	Culture/Anthropology	Non-academic/Commercial documentation
Number of articles reviewed	3	*13*	5	6

Additionally, this extended abstract employs the methodological tactics laid out by Blanchet and Depeyre (2015) for case selection, data collection, and analysis to explore how a controversial market is shaped through multiple perspectives. Specifically, the case selected (marketing of psychedelics) is clearly delineated, public, and a present or 'live' controversy (Blanchet and Depeyre 2015). Sources have been included where appropriate for a scoping review (Mays et al. 2001; Munn et al. 2018) across academic, media, and trade documents considering temporality, relevancy, and pluralism (Blanchet and Depeyre 2015). Thirdly, data has been analysed with care to consider significant events through time and through multiple facets of the issue at hand (Blanchet and Depeyre 2015). The following discussion synthesises findings from the scoping review to examine the issue of psychedelics from within the constructed frame while also aiming to address overflow in the form of externalities (Blanchet and Depeyre 2015).

Discussion

Much like markets, psychedelics have been a part of human lives and cultures for centuries (Guerra-Doce 2015). However, despite a market projected to reach 8.3 billion USD by 2028 (Bloomberg 2022), there is little available literature on the marketing or history of marketing of psychedelic substances. What's more, drug use overall is increasing globally (World Drug Report 2021). As of 2021, drug sales through the dark web alone represent a multimillion-dollar market (World Drug Report 2021). What's more, over the course of the last decade, multiple governments have implemented significant drug policy reform coinciding with processes of both the commercialisation and medicalisation of these substances for clinical therapeutic markets (Calderon, Hunt, and Klein 2018; Chi and Gold 2020; Heal et al. 2018; Sellers and Leiderman 2018).

In recent years, there has also been a significant increase in the number of New Psychoactive Substances (NPS) that are 'new to the market' and, as such, remain to be regulated (World Drug Report 2021). At the same time, the advent of encrypted transactional technology and the associated dark web, create further complexity and availability of prohibited substances (Bălăeț 2022; World Drug Report 2021). Considering the many unknowns in both the mechanisms and impacts of psychedelics, the monetisation of these compounds for therapeutic use poses both significant risks and potential benefits for the treatment of neuropsychiatric conditions, as well as numerous second-order effects both within and beyond therapeutic settings (Bălăeț 2022).

Difficult as it is, the analysis of controversial topics in macromarketing enquiry contributes to the overall understanding of societal issues and participate in culturally relevant debates (Blanchet and Depeyre 2016).

The commercialisation and use of psychedelics is a complex and impactful social issue that is closely entangled with wider systemic challenges. Some proponents herald psychedelics and psychedelic experiences as potential solutions to broadscale ecological or spiritual crises (Elcock 2013). In examining other controlled substances, impacts on users' self-concept (Evans-Polce et al. 2015) and risks of criminal charges and misuse of punitive action also come into play. For example, Hart (2020) explicates a link between the tendency in psychological research towards overstating the negative impacts of recreational drug-use and patterns of police brutality against Black Americans. Overall, the issues of the buying, selling, and use of psychedelics is significantly in flux and coming into closer relationship with marketing-driven ideals through the process of commercialisation.

Shifting Histories of Psychedelics
Despite predating sixties psychedelia, the therapeutic aspects of the history of psychedelics are perhaps less well known than the psychedelics-fuelled counter-cultural movement which began in America during the 1960s (Elcock 2013). For example, MDMA was synthesised in Germany in 1914 and re-entered and exited experimental and therapeutic usage in multiple countries through the course of the 20th century (Heal et al. 2018). These changes ran concurrently with the development of increased drug control systems through both the United Nations and individual governments, perhaps most notably the *Controlled Substances Act* in the United States as influenced by political turmoil over the counterculture emerging at the time (Heal et al. 2018). Many governments have instituted elaborate prohibition regarding mind-altering substances on a case-by-case basis with classifications ranging from legal to legal and regulated, illegal, or decriminalised (Heal et al. 2018; Jacques et al. 2016). A longer standing example of complex drug laws is in Amsterdam whereby coffeeshops are legally permitted to retail hashish and marijuana, however obtaining a supply to do so is prohibited (Jacques et al. 2016). Due to the complexity of the issue and resulting societal impacts (of either criminalisation or legalisation), regulatory logic risks convolution to the point of incoherence.

While it may now appear as a rapid process of commercialisation, a non-profit organisation, the Multi-disciplinary Association for Psychedelic Substances (MAPS) has been actively advocating for the use psychedelics at a medical, legal, and cultural level since 1986 (Emerson et al. 2014). In 2020, MAPS' authors published a paper on the cost-effectiveness of MDMA-assisted therapy for patients with treatment-resistant PTSD (Marseille et al. 2020), thus cementing a foray into the commercial, or at least financial, legitimacy of psychedelic treatments while also continuing harm-reduction work for psychedelic usage outside of a supervised medical context (Emerson et al. 2014). Through close to forty years of research on the part of MAPS, while their operative principles are the same now as they were when the substances were illegal, legitimisation and greater cultural acceptance are not being realised by the substances' inherent therapeutic qualities alone but are beholden to what can be explained and also what can be controlled.

In some respects, the psychedelics-informed approach of MAPS appears to tend towards relational connectivity as the meta-argument for the use of psychedelics. For example, MAPS

founder Rick Doblin was inspired by Stanislav Grof's weaving of psychotherapy with spirituality and science (Emerson et al. 2014). Contrastingly, the current commercial momentum appears more closely centred around science, psychotherapy, changes in legality (arguably in a nascent rather than causal capacity), and commercial viability. One company, FieldTrip Health, raised in excess of $95 million USD in bought deal financing (Global Newswire 2021). Specialising in Ketamine therapy for the treatment of depression, FieldTrip Health was not founded by clinicians, but rather legally trained Ronan Levy and management professional Mujeeb Jafeeri (FieldTrip Health n.d.). While historically attached to idea of liberation and coupled with spiritual and ecologically driven ideas (Elcock 2013), and even before that as a sacred tool of indigenous cultures (Williams et al. 2022), the commercialisation process may shift associations with psychedelic substances further toward the clinical treatment of psychosocial imbalances which is at least in part now driven by commercial interests.

Furthermore, considering the explosion of the use of assemblage thinking in policy makers (Savage 2020), causal and virtually causal processes are integrated between an influencing external system on another open system with the view that emergent properties occur as a result of the interaction between the two (Marcus and Saka, 2006). Assemblage sees power as relationally constructed, rather than centralised (Savage 2020) – thus a controlling power, whether employing assemblage thinking actively or incidentally, may operate in such a way that power is retained through relationship to the dissenting forces, such as a counterculture, as in the case of psychedelics.

Transferred Meaning of Associated Ephemera And Co-Opted Symbols Of Psychedelia
Stylised psychedelic aesthetics have also been co-opted into seemingly unrelated categories. One such example can be seen in Coca Cola's Fruitopia. A product discontinued in the U.S.A, but available in Canada carries product names including 'Fruit Integration' and 'Tangerine Wavelength' (Coca Cola n.d.). The drinks ingredients include filtered water, fruit juice from concentrate, sugar, and a list of additives (Coca Cola n.d.). However, the marketing materials suggest something more psychedelic — Fruitopia expands awareness. In 1994, Coca Cola released a series of psychedelically styled commercials with soundtracks by the musician Kate Bush, whirling geometric patterns, and taglines such as:

> *There is a wonderful person inside you who is dying to get out. Please drink a raspberry psychic lemonade for him/her* (YouTube, n.d.)

At the time of writing, the product is described as follows:

> *Fruitopia gives you the "inspiration to unleash your full imagination with unique flavour combinations, bold colours and creative, inspiring personality."* (Coca cola, n.d.)

Continually, marketing thought is dynamically shaped by both concepts and context (Tadajewski 2022). The above presents just one among many examples of the commercialisation of countercultural psychedelic ephemera. Consider the contrasting sets of associated ephemera, be it a plastic bag of shrivelled fungi and a bearded character with a rainbow tie-die t-shirt, or a physician wearing a light blue shirt and tie distributing pills in clean, quiet room.

As with almost anything ingested, both the individual and social impacts are influenced by quantity and context (Hartogsohn and Petranker 2022); for example, whether the ingestion is considered as therapeutic or pathological is at least in part a function of the location of the user – be it clinical, recreational or illicit. Whether real or imagined, the association between an idea with a substance along with ephemera creates a structure of associations that seems fundamental to the premise and practice of marketing. During the period of increased availability and moves to decriminalise, or regulate substances for clinical use, policy tensions may arise when it comes to drawing a distinction between health use and recreational or illicit use (Luong et al. 2021). What's more, social, institutional, and cultural forces all interact in such a way that the outcome of similar policy implementation is likely to vary greatly on a case-by-case basis.

Conclusion and Further Research

A potential externality evident through the above discussion, and one that warrants further research, is an enmeshment of the use of psychedelic substances with market values. The adaptation to a clinical setting, which is ultimately a controlled commercial setting, brings many new symbolic attachments. These new associations risk disregarding the ritual and group aspects of psychedelic consumption and will also likely have flow on effects to those previously incarcerated for psychedelic use (Devenot et al. 2022; Emerson et al. 2014). Furthermore, through the adoption into a brief counter-cultural movement, and more so now as a vehicle of commercialisation, the indigenous psychedelic treatments among those being medicalised are at risk of being absorbed into the dominant market-logic driven system for supply without directly benefiting, or even preserving, the traditions which originated them (Devenot et al. 2022; Williams et al. 2022).

Bordering on the absurd, the combination of simultaneously prohibiting a substance while adopting them in other contexts for commercial gain contributes to a culture in constant tension. This is a phenomenon not without historical precedent, but rather mirrored in the prolonged tensions surrounding alcohol prohibition (Hall 2010), tobacco control (Evans-Polce et al 2015) and cannabis policy and commercialisation (Klein 2017). Not exclusively, researchers at MAPS have been advocating for psychedelics for over 40 years, so a clinical quasi-legalisation of certain substances approved for use in certain cases may not be as radical as it seems at first glance.

This work begins to demonstrate how the connection between political and legal frameworks with marketing rhetoric shapes the perceptions of a particular substance or human activity, in the absence of direct experience (empirically, n of 1). Just as the consistent marketing of a holiday to a Pacific location may produce a clear, standardised mental simulacrum of what the sensory experience entails – blue skies, blue water, and bright sand beaches – beyond the direct experience of it, marketing messages provide a consumer with enough information that they might imagine what it could be like, or even produce a mental image of who might partake in it. The topic of psychedelics is unique in that it significantly changes the state of experience in psychedelic usage and may significantly challenge ontological certainties (Elcock 2013). In this context, the shift of psychedelics from being classed as criminal activity into a clinical industry, while a significant shift from criminalisation, represents a managerial response to individual experiences with differing states of consciousness. As such, psychedelics have shifted in conceptual positioning from spiritual practices of indigenous cultures (Devenot et al. 2022;

Williams et al. 2022), to being adopted as a liberatory tool of a brief and radical counterculture (Elcock 2013), to now emerging as a controlled, cost-effective tool of the clinician (Devenot et al. 2022; Marseille et al. 2020).

The re-legalisation process presents a definitive split in the associations with these substances, as well as the more general cultural appeal to either adopting or rejecting participation in any related subcultures. However, as demonstrated above, neither of these shifts is entirely without either harm or benefit. This presents an opportunity to move beyond moral-logic and the intellectual-positioning of one's own point-of-view as definitively right, while others are distinctly wrong, and to create a social-communicative structure that is characterised by diminished polarisation, critical thinking, and greater nuance. As such, further research could include systematic analysis of the relationship between psychedelic research and commercial viability, content analysis of commercial providers of psychedelics and their management of externalities, ethnographies of set and setting in medicalised psychedelic markets, a comprehensive history of psychedelic markets beyond the scope of this document, or primary research interviewing indigenous practitioners regarding the medicalisation of psychedelic medicines. Cross-disciplinary research to establish ethical parameters for the promotion of psychedelics could also contribute to an integrated view of psychedelic markets.

Implications for Macromarketers
Through the example of psychedelic markets, this extended abstract begins to address how commercialisation continually contributes to the way one thing, or subset of things, may take on very different meanings at both the local and macrosocial levels over time. Significantly, this extended abstract illustrates how the combination of political, commercial, and sub-cultural interests influence the socio-cultural attachments pertaining to a particular product or substance. Considering psychedelic markets in this frame set an agenda for further research and provides a unique window into the understanding of how the interactions or collaboration between marketing and government led interests has influenced collective discourse on the ethics of an issue such as psychedelics. This enquiry also brings to light some complexities regarding the motivations and attachments among advocates of a particular approach.

Macromarketing researchers are uniquely poised to bridge the gap between cultural and anthropological work, public health and policy, and the commercial changes already taking place in the marketing of psychedelics. Therefore, this topic, while it may be delicate and challenging, warrants further discussion in the macromarketing domain.

While this article is contextualised within the commercialisation of psychedelics, as a topic mired with controversy, these lines of enquiry are also relevant to macromarketers aiming to address externalities in other fields (Blanchet and Depeyre 2016). Specifically, it considers positive and negative externalities in tandem, and invites macromarketers to further elucidate whether the focus of a particular line of enquiry is chiefly on gaining understanding (knowledge-driven), social beneficence, or on maintaining existing market structures while reforming their conceptualisations.

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Food Marketing Track

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Retail Sales Promotions for Suboptimal Food – How to Reduce Food Waste Without Harming Customers' Loyalty?

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Introduction

Food Waste – defined as the disposal of food by retailers or consumers (FAO 2019) – is a social issue of high importance. Globally, consumers and retailers waste up to 931 million tons of food every year (United Nations Environment Programme 2021), representing 17% of the food produced worldwide (FAO 2022). The negative effects of food waste are manifold. For instance, wasting food releases emissions and methane (Bernstad Saraiva Schott, and Andersson 2015).

One of the main reasons for retailers' food waste is suboptimal food (de Hooge et al. 2017), defined as "[…] foods that consumers perceive as relatively undesirable as compared to otherwise similar foods because they either: (1) are close to, at or beyond the best-before date; or (2) deviate (visually or in other sensory perception) from what is regarded as optimal" (Aschemann-Witzel et al. 2015, p. 6459). As consumers prefer products that closely meet their requirements, they tend not to buy or consume suboptimal food (Helmert et al. 2017; Mookerjee, Cornil, and Hoegg 2021).

Retailers are increasingly using sales promotions to promote suboptimal food (Hartmann, Jahnke, and Hamm 2021). For example, Lidl developed a suboptimal food strategy, whereby suboptimal foods are reduced by 30%. In doing so, retailers intend to reduce potential losses from food waste and contribute to a more efficient use of resources. However, it is not yet clear how sales promotions for suboptimal food affect consumers' loyalty to the retailer. On the one hand, prior research revealed positive effects of sales promotions for suboptimal food on consumers' product perceptions, willingness to pay, or purchase intention for suboptimal food, which could lead to higher loyalty to the retailer (e.g. Mookerjee, Cornil, and Hoegg 2021; Grewal et al. 2019). On the other hand, though, consumers have been found to distrust the retailer when they discover food close to the expiration date at the time of purchase (Giménez, Ares, and Gámbaro 2008), which might cause negative effects of those sales promotions for the relationship between customers and retailers. In order to further motivate retailers' food waste engagement, it is important to investigate how sales promotions for suboptimal food can reduce food waste without harming consumers' loyalty to retailers.

Literature Review

In general, the literature shows that the application of sales promotions is a promising approach to avoid food waste (Hartmann, Jahnke, and Hamm 2021). In particular, three characteristics of sales promotions have been the focus of previous studies: the type of price discount, the communication and the design of the promotion.

Several studies examined the impact of **the type of price discount** on decision-making regarding suboptimal food. Theotokis, Pramatari, and Tsiros (2012), for example, investigated the effects of Expiration Date Based Pricing – "[…] a pricing tactic in which a retailer charges different prices for the same perishable products, according to their respective expiration dates" (Theotokis, Pramatari, and Tsiros 2012, p. 72). They show that Expiration Date Based Pricing can lead to lower perceptions of brand quality; this effect is mitigated when retailers inform consumers that the objective of this sales promotion is to reduce food waste.

Other studies examine the impact of the **communication of the sales promotion** and compare different types of appeals accompanying sales promotions for suboptimal food. For example, prior research examined the effectiveness of budget-related (e.g. "reduced item/low price, save more!", Aschemann-Witzel et al. 2019) and sustainability-related appeals which make consumers aware of food waste (e.g. "Embrace imperfection: Join the fight against food waste!", van Giesen and de Hooge 2019).

Few studies have investigated the influence of the **design of sales promotions** on consumer behavior. For example, (Helmert et al. 2017) used eye tracking to investigate how the color of the discount tag can influence time to fixation and total fixation duration. The findings of the study reveal that red (compared to green) color reinforces consumers' attention, cognitive processing and purchase intention.

This study contributes to prior research on suboptimal food in two ways. First, we look at the consequences of sales promotions targeting suboptimal food on retailer loyalty. This is important given that sales promotions for suboptimal food can benefit or harm customer loyalty. With one exception (e.g. Louis and Lombart 2018), prior studies mainly focus on the consequences of sales promotions for product perceptions. Second, this study takes a holistic picture of sales promotions and considers multiple characteristics, thereby taking into account potential interactions among different characteristics of sales promotions.

Theoretical Background
We rely on signaling theory to shed light on the effects of sales promotions for suboptimal food (Spence 1973). When purchasing suboptimal food, consumers are confronted with high information asymmetries. Based on signaling theory, consumers actively search for signals to counteract this information asymmetry (Spence 1973). The characteristics of the sales promotion for suboptimal products, such as the color of the discount tag and the communication, can act as such signals to consumers and hence influence their product perceptions (i.e. product quality) and retailer perception (i.e. skepticism).

Building on signaling theory, we assume countervailing effects of the color of the discount tag on customer loyalty. On the one hand, the color of the discount tag can deliver information on the quality of suboptimal products to the consumer. Previous studies have shown that green color (compared to red) can arouse health expectations among consumers (Huang and Lu 2015). In turn, it can be assumed that green (compared to red) discount tags evoke more positive quality perceptions among consumers, in turn increasing loyalty to the retailer.

H1: Green discount tags, compared to red discount tags, have a positive effect on consumers' loyalty to the retailer, mediated by consumers' perceived product quality.

On the other hand, the color of the discount tag can be used to gain inferences on retailers' motives behind a sales promotion. According to prior research, unexpected signals tend to cause more explanation attempts among consumers than expected signals (Pyszczynski and Greenberg 1981). Given that green discount tags are relatively rare, these tags are more likely to trigger explanation attempts among consumers which in turn might stimulate skepticism regarding the sales promotion, thereby reducing consumers' loyalty to the retailer:

H2: Green discount tags, compared to red discount tags, have a negative effect on consumers' loyalty to the retailer, mediated by consumers' skepticism.

When multiple signals are combined, consistency among the signals determines its effectiveness (Spence 1973). Color of the sales promotion and the related communication are two independent signals that can be perceived as consistent or inconsistent by consumers. When consumers encounter consistent signals such as a green discount tag and sustainability-related appeal, they tend to trust the signals, resulting in positive perceptions of the product and higher loyalty to the retailer. In contrast, when consumers encounter inconsistent signals such as a red discount tag and a sustainability-related appeal, consumers will distrust the signal, stimulating negative perceptions of the product and reducing loyalty to the retailer.

H3: Sustainability-related appeals (compared to no appeals) (a) strengthen the positive effect of green discounts (compared to red discounts) on consumers' loyalty via perceived product quality, and (b) attenuate the negative effect of green discounts (compared to red discounts) on consumers' loyalty via skepticism.

Experimental Study
Research design and participants
We conducted a scenario experiment with a 2x2 between-subjects design, investigating the effects of color of the discount tag (red vs. green) and communication (no appeal vs. sustainable-related appeal) on consumers' perceptions of the product and the retailer. In total, 707 people participated in the experiment. The average age of participants was 32.4. 38.2% of the participants were male, 61.1% were female, and .7% were diverse.

The experiment was conducted online. All subjects received a scenario description that asked them to imagine that they were doing their weekly grocery shopping and would like to buy a vanilla-flavored yogurt. Depending on the experimental group, participants were shown a picture of a vanilla-flavored yogurt that was close to the expiration date with a red or a green discount tag. In addition, the discount tag either showed no appeal or a sustainability-related appeal pointing to the possibility to avoid food waste. Afterwards, participants had to fill out a questionnaire including key constructs, manipulation and realism checks and demographics. We relied on established scales to measure perceived product quality (White et al. 2016), skepticism (Eggert, Steinhoff, and Garnefeld 2015), and loyalty to the retailer (Dutta et al. 2019). All items were measured on seven-point Likert-type scales.

Results

We employed the PROCESS procedure (Model 7) to test the effects of sales promotions for suboptimal food on customers' loyalty (Hayes 2022). The results (see figure) reveal different effects of the two characteristics of sales promotions on customers' loyalty via product quality and skepticism. The indirect effect of the two-way interaction between color and communication on customer loyalty via product quality was not significant (b = .07, SE = .06, 95% CI = [-.04; .19]). In particular, color of the discount tag has no effect on perceived product quality, neither alone (b = -0.08, SE = 0.14, 95% CI = [-0.34, 0.19]) nor in combination with a sustainable-related appeal (b = 0.11, SE = 0.09, 95% CI = [-0.07, 0.29]), contrasting H1 and H3a. Yet, we find a significant indirect effect of the two-way interaction between color and communication on loyalty via skepticism (b = .06, SE = .03, 95% CI = [.01; .12]). That is, a green discount tag reduces loyalty due to increases in customers' skepticism, if no appeal is present ($b_{\text{no appeal}}$ = -.03, SE = .02, 95% CI = [-.08; -.01]), in line with H2. This negative effect can be mitigated by appropriate communication of the sales promotion, such that a sustainable-related appeal reduces the negative effect of a green discount on customers' loyalty via skepticism ($b_{\text{sustainable-related appeal}}$ = .02, SE=.02, 95% CI [-0.01, 0.06]), confirming H3b. Given that the direct effect of green (vs. red) discount tags on customers' loyalty is non-significant (b = .04, SE = .09, p = .62), we can conclude that the effect of the sales promotion on loyalty to the retailer is fully mediated by consumers' feelings of skepticism.
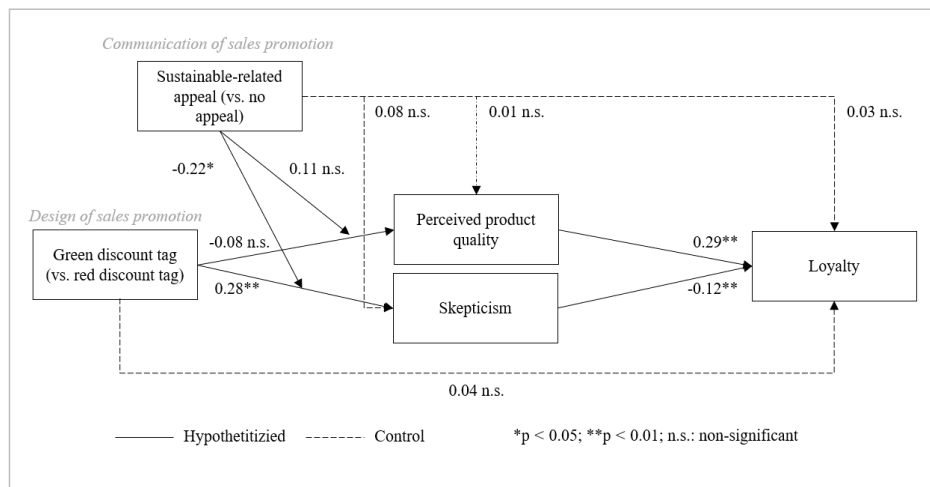
Figure 1. Conceptual model and results.

Discussion

We shed light on the effects of sales promotions for suboptimal food on customers' loyalty to the retailer, thereby making three important contributions.

First, our study reveals the importance to account for the effects of sales promotions for suboptimal food on the customer-retailer relationship. While past studies established mainly positive effects of sales promotions on the sale of suboptimal food, sales promotions can also negatively affect consumers' loyalty to the retailer. Particularly, sales promotions can spur customers' skepticism resulting in negative effects for loyalty behavior when the characteristics

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of the sales promotion are relatively unexpected (e.g. retailers use green discount tags without any further justification). Retailers should be aware of these potential dark side of sales promotions for suboptimal food.

Second, the results highlight the importance to consider potential interactions among different characteristics of sales promotions. Since the interpretation of signals strongly depends on the consistency among the signals, retailers should carefully design their sales promotions for suboptimal food. For example, retailers can prevent potential negative effects of green discount tags if they successfully communicate the sustainability-related motive of the sales promotion, thereby ensuring the credibility of the sales promotions.

Third, our study shows that effective sales promotions for suboptimal food have a positive effect on customers' loyalty. This may motivate retailers to use sales promotions that reduce food waste at the point of sale. Reducing food waste in turn leads to more efficient use of resources and a more sustainable society.

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Transitioning from Home to University: Navigating Liminality Through Student Food Practices

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Introduction

This study focuses on the food practices of young people transitioning into emerging adulthood at UK universities. In the United Kingdom, the move to university often involves a move away from a family home, where feeding the family and the work this entails largely falls upon the mother (Cairns and Johnston 2015). As students begin their university life, they also face the challenge of shopping, cooking and catering for themselves for the first time. Viewing student life as a transitional space, this paper explores the ways in which students develop food practices to navigate this transitory period and in particular the way they connect to family and friends as part of this process.

Transitioning into young adulthood via university life

The term liminality is derived from the Latin word "limes" meaning threshold and has been used in anthropological terms with reference to rites of passage (Van Gennep 1991). Rites of passage refers to the movement from one social position to another, and liminality refers to the transitionary phase between one stage and another. In the liminal phase individuals can find themselves in neither the old nor the new social position, but betwixt and between the two. We argue that life at university for students is one such liminal phase; in this phase established social structures associated with life at home are disrupted as they move away and take on increased responsibility and independence and new social structures are in the process of being established. As students navigate this period we look at how they approach and adapt their food practices and examine the role played by old and new connections ('communitas', Huseman et al. 2016) with others. The paper utilises Darveau and Cheikh-Ammar's (2021) theoretical framework of liminality in consumer research to consider the
behaviours that enable and embrace liminality as well as those which serve to hold off liminality.

Methodology

The research is based on in-depth semi structured interviews conducted with 25 students in the United Kingdom, in their first year of university and no longer living at home. The interviews took place and were recorded via Zoom. The interviews were transcribed and thematic coding was used to analyse the data (Braun and Clarke 2006).

Preliminary findings

Following on from the work of (Darveau and Cheikh-Ammar 2021), initial analysis reveals that participants engage in a range of food practices during their first year of student life. Some of the practices embrace the period of transition and liminality, using the opportunity to experiment and try out news things. Others work to overcome liminality and transition to a more independent living in terms of food consumption and others serve to postpone liminality and the transition.

1) Food practices which help students adapt to the experience of transition and liminality - When moving to university students are often in shared accommodation with other people in the same situation as themselves; the shared kitchen thus becomes a space in which to form a communitas of shared experiences. Within this space participants used food to make connections with others. It was a way of initiating conversation through discussing ingredients, passing on cookery tips or learning new recipes. Food was also a way to offer friendship and demonstrate kindness, for example baking cookies or cake specifically to share with others. In some cases participants reported how space was used to develop more formal approaches to sharing and connecting with others, for example using a specific shelf in the fridge on which to placed items that they wanted to share out. Other examples included individuals placing their kitchen equipment in the shared space for everyone to use. Technology was also utilised to develop a shared approach to domestic tasks, for example one student discussed a Whatsapp group which was used to highlight when the kitchen should be cleaned and arranging a time for all to do this. A number of participants reported that they had organised specific times and events for social connections to form. For example, some had organised and/or participated in a "Come Dine With Me" type of experience, whereby flatmates took it in turns preparing a three course meal which was consumed and then rated by the group. Others discussed how they organised pizza making evenings whereby everyone would make and then eat the pizza together. Sometimes the participants said they learned through experimenting with food together with their friends. *"We just, yeah, we… So we just come up with meals we want to try out, and we just make them together. We'll go out and buy the ingredients and just, yeah, random meals. " (P. 15)*. They adjusted to the new social position of cooking for themselves by trying out and learning new things, often in a collective way.

2) Food practices which seek to overcome liminality –participants also discussed food practices which were done at home to reduce feelings of ambiguity and discomfort. Some participants aware they were entering a transitory phase made an effort to learn how to cook for themselves prior to leaving for university. They watched their parents cook and often asked them how to make specific dishes they enjoyed e.g rice and vegetables. This enabled them to replicate these dishes at university and remind them of home.*" Uhm, I think this (*jacket potato, tuna mayo cheese) *just reminds me of home, to be honest."(P. 25)*. Before she left home, one participant, together with her mother, made a list of favourite family dishes which would be suitable to cook at University. Another, having noticed his mom had collected recipes she used in a folder, noted down some of these recipes in a notebook. Respondents also took equipment from home to university to enable them to make the dishes they cook at home, for example Participant 23 took a rice cooker so she could make her favourite rice and stew dish.

3) Food practices which seek to hold off liminality – These practices meant that although they now lived away from home, students would not have to engage fully in the provisioning of food. In these examples, the actions of family members played an important part in the provision of food and can be seen to delay the transition to an independent adult. One participant was given strict instructions not to waste time cooking, as to do so would distract them from their studies. *"So, cooking wise, she knew I wasn't gonna get around to cooking and she didn't want me to cook as well, 'cause she knew that I'll waste my time cooking instead of studying. Also, she was, like, yeah, just order food and stuff." (P. 19)*. In order that the student didn't 'waste' time cooking, he was provided with a credit card for eating out every day. Similarly, an international

participant's parents introduced their child to family and friends in the UK who would have him to dinner so he too, did not have to cook. Other parents tried to reduce the financial pressure and the need for their children to budget through providing them with a credit card for food purchases which they paid off. Other participants stated that their parents provided them with food, thus easing budgeting and/or cooking requirements. When the participants were initially dropped off at university parents would provide them with bulk basic ingredients e.g. rice. Other students regularly went home and would return with food, either entire meals or ingredients. Similarly, parents would visit the participants and bring food with them either entire meals, stocks of basic ingredients or expensive ingredients. *"Well, if my parents come, then they'll bring me lamb, 'cause, uh, that's quite expensive, so I get them to buy me that." (P. 17).*

Conclusions

The study reveals that in this emerging adulthood phase, students use established food practices to bring comfort and familiarity into the liminal space but they also develop their food practices through experimentation. Time, space and connections with others, whether they be family or friends, can serve to enhance or impede this experimentation. Higher education institutions need to support students in their adaptation to university life and to develop healthier student communities. This requires providing information and support in this transitional phase, perhaps linking cooking to physical and mental wellbeing and emphasising how they can consistently eat healthily with a multitude of demands on their time.

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Towards the Actors Co-creation and Organic Intimacy Controlled by a Market Mediator in a Nascent Category

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Background

In 2021, the Ministry of Agriculture, Forestry and Fisheries (MAFF) launched the "Green Food System Strategy," which aims to increase the organic farming share to 25% (currently, > 1%) of the total agricultural land area by 2050 (MAFF 2021). Organic farmers cannot make a living without reflecting the increased costs in their selling prices. Also, it is problematic that the value of organic produce is not evaluated in the market.

Research Objective

In the 1970s, when "food safety" became an issue due to environmental pollution and pesticide damage, a unique Japanese "Teikei" movement, based on mutual trust between farmers and consumers began. The basic rules of this movement are contract farming and purchase of all harvested ones, similar to the CSA (Community Supported Agriculture) that have spread in the U.S. and Europe in recent years. Consumer (mainly women) organizations volunteered to perform distribution functions through "cooperative purchasing," at the same time participating in study groups, which had the aspect of a social movement.

As women entered the workforce, an increasing number of organizations began outsourcing their distribution to specialized companies and offering individual home delivery services. In the late 1980s, distribution channels became more diversified, and organic produce became established. However, ambiguous organic labeling and "fakes" also emerged and caused confusion. MAFF created labeling guidelines and introduced a legally binding organic JAS (Japanese Agricultural Standards) certification system in 2001.

However, only slightly more than 0.2% of farmland is JAS-certified organic in 2019, with more being used to grow organic produce without certification. Certification is expensive and complicated. It is also claimed that consumers do not fully understand the organic JAS certification logo and do not use it as a criterion for making purchase decisions. Even if farmers do not have this certification, they may be able to sell to specific customers because they have an established relationship.

How can we induce light users into the market, instead of heavy users who participate in partnership with farmers? We conducted the following survey to explore the possibility of supermarkets increasing their sales and organic farmers as suppliers.

Data Collection
In Shirakawa-cho, Gifu, and Ichijima-cho, Hyogo, both of which are active in accepting newcomers to organic farming, we interviewed a total of 10 people in 2021 and 2022. Through "Yuki Heart Net", interviews were conducted with the manager of a farmers' market in Nagoya and the manager of Shunrakuzen, a membership organic supermarket.

Findings
Organic produce is basically "wide-ranging items, low-volume production," in which multiple crops are grown in rotation to avoid the risk of drastically reduced yields due to weather conditions or pests. Their main sales channels are road stations and farmers' markets nearby areas, but constant sales volume is difficult. Meanwhile, sales to urban areas are made through dealings with specialized distributors or by truck on behalf of the farmers. In transactions with specialized distributors, farmers are instructed to comply with the pre-contracted quantity as closely as possible. If a certain number of customers are subscribed to monthly vegetable subscription boxes, in which farmers can freely change the combination of vegetables, sales will be stable, but there are limits to increasing customer numbers because of the time and effort required for delivery and claims handling. Although transactions with supermarkets are attractive, farmers are unwilling to do business with them as long as they have to adjust crop acreage and face strict demands for price reductions from supermarkets.

Under such circumstances, Shunrakuzen's way was opposite to that of common supermarkets. The company deals directly with farmers with shipment date and price determined by them. The installation of a sales section for "Yuki Heart Net" enables direct, effective communication through assortments, displays, and POP. Furthermore, the company holds events at its stores to promote interaction between farmers and customers, and offers children hands-on experience in agriculture.

Implications
Whether or not the organic produce market can expand in Japan is a social issue that should be analyzed in the macromarketing field. Moreover, analyzing the macro/social changes that emerge in the interaction of the players will contribute to the theoretical development of macromarketing (Shultz 2007).

Highly convenient supermarkets that allow customers to check directly when they want to buy, rather than the more expensive home delivery will be a more promising sales channel. However, not only do consumers not check the organic JAS logo when purchasing in stores, they also often do not understand what organic is and its value. Then it is not so much a market failure due to asymmetric information that is preventing organic market expansion, but rather that a market has not yet been formed. In this sense, "Teikei" in the early days of the Japanese organic market is highly suggestive, as it is believed that the sharing and creation of value based on trust is taking place.

We can suggest that the Shunrakuzen partnership is similar to the Teikei relationship. The company is a local supermarket that can bridge the gap, promoting direct interaction between farmers and consumers, and fostering intimacy (Pétursson 2018) and co-creating value (Prahald and Ramaswamy 2004) for organic markets through information provided to consumers in stores, product tasting, and agricultural experiences.

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Death and Dior: A Terror Management Theory Perspective on the Usage of Luxury Goods to Cope with Threats of Mortality

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Omar Shehryar, Montana State University, United States of America

Terror Management Theory (TMT: Solomon, Greenberg, and Pyszcynski 1991) has emerged as a valid and meaningful framework for examining consumption decisions in the context of consumers' values, beliefs, and individual differences. Previous research found that making one's mortality salient increased consumer preferences for high-status-conferring items over low-status ones (Mandel & Heine, 1999). This preference was attributed to consumers' striving for increased acceptance in society through ownership of consensually validated symbols of value. Recent events, (i.e. COVID pandemic and images of war in Ukraine) make it seem that our world is an increasingly unsafe place with abundant reminders of mortality imbued in daily life. These subtle reminders of death through media consumption can heighten one's awareness of one's mortality and lead to increased death anxiety followed by worldview defense that has been observed in TMT studies (Garfin et al 2020; Yoon et al 2021).

Whereas past research explains the increased indulgence in status-conferring goods following mortality salience as a function of participation in consumption-related value systems such as materialism (Rindfleisch, Burrows, and Wong 2009), and status-consciousness (Mandel and Heine 1999), less is known about cognitive mechanisms related to consumption which are employed to reduce the death-anxiety brought about by conscious awareness of one's finitude. We contribute to both TMT and literature on luxury goods by testing the use of fantastical thinking as a cognitive mechanism used by consumers in dealing with conscious reminders of mortality. We suggest that mortality concerns activate engagement in fantastical thinking which facilitates a preference for luxury products.

Additionally, utilizing a macro-level social psychological theory (Terror Management Theory), allows for a better understanding of the complex relationship between one's worldview and consumption behaviors. While individual consumption behaviors and worldviews are micro rather than macro in nature, a full understanding of these processes is necessary to investigate and understand macro-level trends such as the changing demand for the luxury industry (Hedstrom 2005; Layton 2015). Therefore, the present study aims to contribute to the macromarketing literature by providing a link between the micro-level factors (i.e. mortality salience, fantasy engagement and fantasy proneness) that motivate individuals to engage in the consumption of luxury goods—which has been linked to macro-level concerns such as consumer well-being (Cristini et al. 2022), and environmental sustainability (Cannon & Rucker 2019; Pai et al. 2022).

Background

Terror management theory (TMT) (Greenberg et al. 1986; Pyszczynski et al. 1997; Solomon et al. 1991a, 1991b) has improved our understanding of values and belief systems and the protection they offer from the fear of one's demise. A unique response to the fear of death, as observed in tests of the mortality salience hypothesis of TMT, is greater adherence to

consensually held beliefs. Greater observed adherence to socially ascribed worldviews is stated to arise from a need for increased social connectedness and acceptance following an existential threat (Simon et al. 1997). Moreover, the increase in self-esteem that accompanies participation in consensually held belief systems is shown to cushion one from the threat of death (Greenberg at al. 1992).

It has been shown that brushes with mortality spur an increase in material pursuits because the result of acquiring status-enhancing possessions is higher self-esteem and an elevated sense of connectedness through participation in consensually validated belief systems. Therefore, our first hypothesis stating the impact of mortality salience on preference for luxury goods is as follows:

H1: Individuals in the mortality salient condition will express more positive attitudes towards luxury goods than those in the control condition.

Study 1: Mortality Salience and Consumption of Luxury Goods
Method
Respondents were randomly assigned to a single factor (mortality salience: mortality salient (MS) vs. dental pain as control condition) between-subjects design and asked to complete a filler task as well as indicate how likely they would be to purchase a luxury wallet or sunglasses. In addition, respondents were asked to indicate their overall attitudes towards luxury products.

Analysis and Results
As predicted, those in the MS condition reported having a more favorable overall attitude towards luxury goods compared to those in the dental pain condition ($t_{(67)}= 2.37$, $p < .05$, $M_{MS}=4.26$, $M_D=3.43$) and were more likely to purchase luxury goods in both the sunglasses, ($t_{(67)}= 1.98$, $p < .05$, $M_{MS}=3.97$, $M_D=2.98$) and wallet product categories ($t_{(67)}=2.21$, $p < .05$, $M_{MS}=3.63$, $M_D=2.57$). Therefore, H1 was supported.

Fantasy, Terror, and Luxury Consumption
Although researchers have examined the role of fantasies and daydreams in influencing consumption, the role of fantasies evoked before and during consumption of luxury goods to enhance status is relatively less clear. Every day, consumers are given ample opportunities to utilize objects to express oneself. Visual reminders of consensually held symbols of value are replete across media through advertising, promotion, and insertion of brands in entertainment. Indeed, the transfer and movement of consensually held meaning through objects and experiences is well-established by McCracken's (1986) model which acknowledges the value of objects and media in influencing and in turn being influenced by culture. The dialectical interplay between shaping culture and being shaped by it increasingly involves objects, media, esteem-granting sub-cultures that ritualize brand consumption, and fantastical realms such as the metaverse.

As fantasy and reality comprise the base of the experiential consumption context, it follows that when reality involves reminders of death as the ultimate ending of one's plans and aspirations, engagement in fantasy can provide an escape from imminent danger. Thus, for consumers faced with ubiquitous reminders of their own demise, refuge is available in material objects. But, to

accrue the symbolic benefits, one must utilize fantastical thought. This leads to the following hypothesis:

H2: The relationship between MS and the consumption of luxury goods will be moderated by fantasy engagement such that when mortality is salient, those higher in fantasy engagement will be more likely to consume luxury goods than those with low fantasy engagement.

Study 2: The Moderating Role of Fantasy
Study 2 replicates the findings of study 1 and additionally, investigates the moderating effect of fantasy engagement on the relationship between mortality salience and the consumption of luxury goods.

Method
Respondents were randomly assigned to a single factor (mortality salience: MS vs. dental pain as control) between-subjects design. They were then asked to complete a filler task, indicate their involvement in fantasy activities, and asked questions about their purchase intentions for luxury goods and general attitudes towards luxury products.

Analysis and Results
As predicted, positive fantasy engagement (PFE) moderated the relationship between mortality salience and purchase intentions for luxury goods in both product categories: luxury jacket and luxury wallets such that those in the MS condition with greater PFE reported higher purchase intentions than those with lower levels of PFE. Similarly, those in the MS condition with greater positive fantasy engagement also reported more positive attitudes towards luxury products in general than those with low PFE. Therefore, H2 is supported. See Figures 1a & 1b for a graphical representation of these interactions. As hypothesized, the results support the notion that the greater fantasy engagement within MS was more likely to increase preference for luxury goods.

Figures 1a & b: Interaction of Mortality Salience and PFE on Purchase Intentions- Study 1
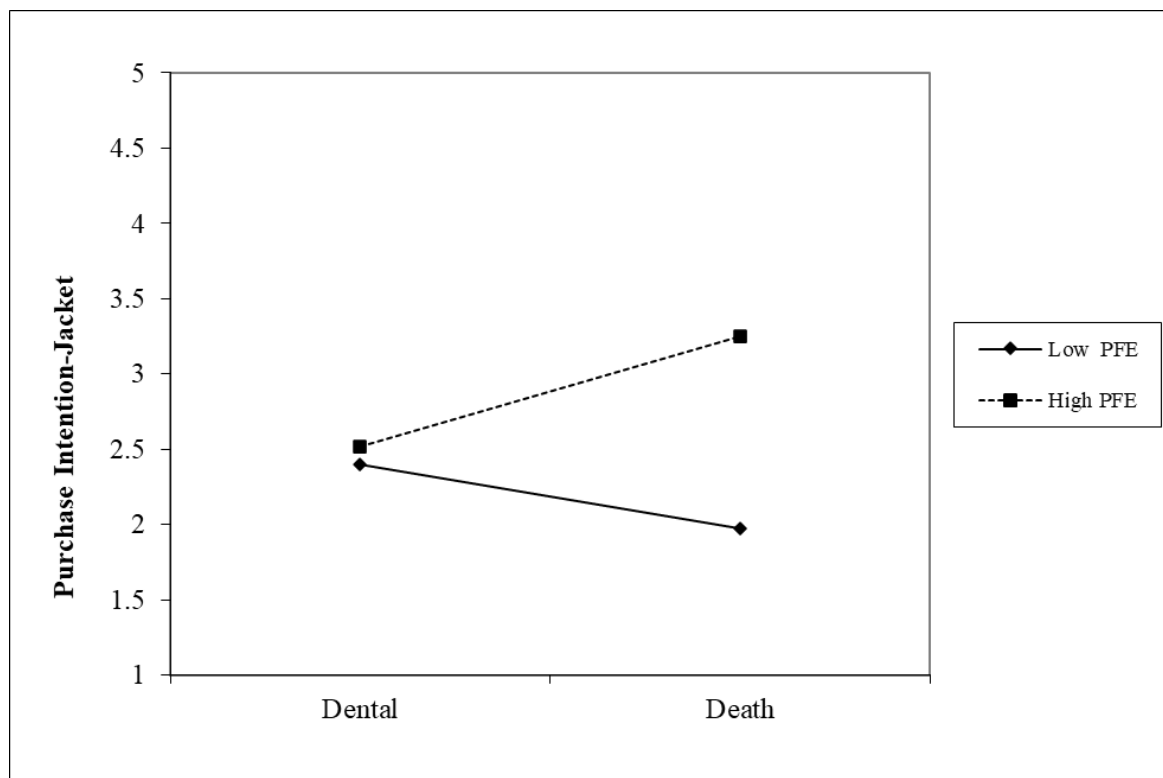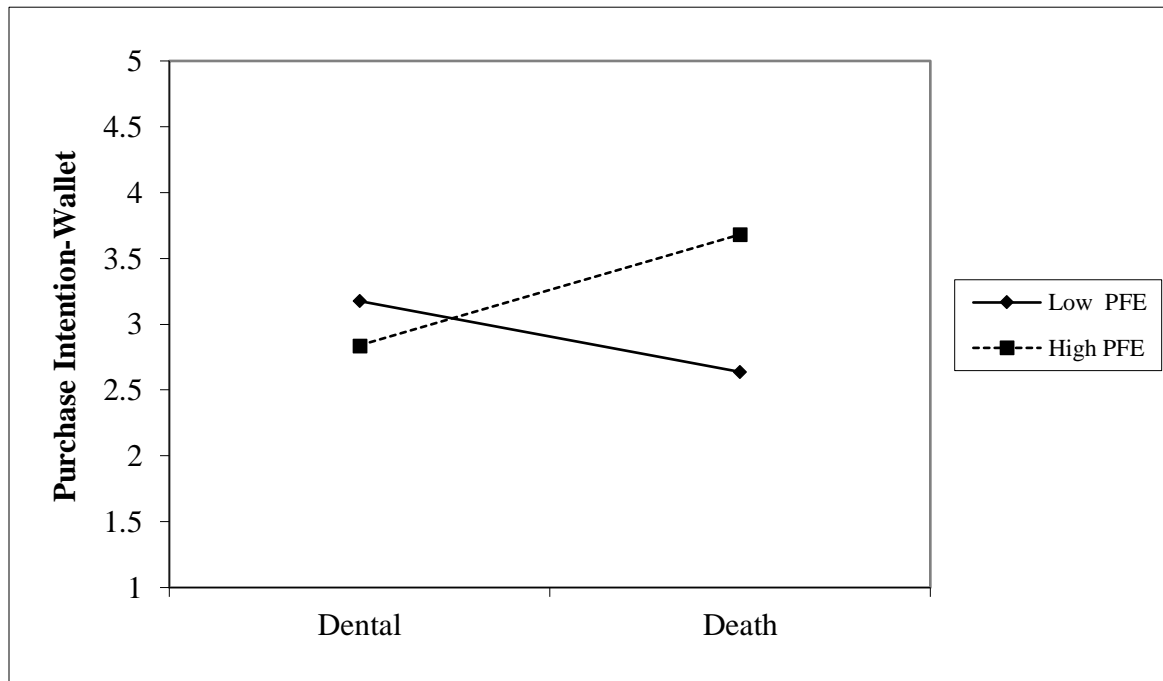
Study 3: Fantasizing through Luxury Consumption
The purpose of study 3 was to further explore the relationship between MS and fantastical thinking and its impact on consumption of luxury goods. The use of fantastic visualization and imagery depends on consumers' unique past and sociocultural background. Past research introduced "fantasy proneness" as an individual difference variable which has been shown to impact behavior (Wilson and Barber 1983).

Specifically, we hypothesize that when mortality is made salient, individuals who are more prone to fantasizing will engage in greater fantasy engagement involving the objects under evaluation. The increased engagement in fantastical thinking will positively influence such individuals' preference for luxury goods because luxury goods lend themselves to becoming a part of one's fantastical realm more than non-luxury goods. The engagement in fantastical thinking about a luxury object, its use, and its transcendent quality, in turn relieve the anxiety felt when confronted with one's own mortality. A moderated-mediation model was proposed and tested which included fantasy through luxury consumption as a mediator. To test this idea, we propose the following hypothesis:

H3: The relationship between mortality salience and the consumption of luxury goods will be mediated by fantasy through luxury consumption; this mediation will be moderated by fantasy proneness such that when mortality is salient, those higher in fantasy proneness will be more likely to engage in fantasy through the consumption of luxury goods.

Study 3: Fantasy Engagement as Moderated-Mediator of Luxury Consumption
Method
Respondents first answered questions related to their fantasy proneness, followed by exposure to the MS condition and filler task. Then, respondents were asked to indicate their purchase intentions for two product categories, overall attitude towards luxury goods followed by statements related to fantasy through luxury consumption.

Analysis and Results
The hypothesized moderated-mediation model (see Figure 2 for a detailed list of coefficients) was tested using PROCESS macro (Model 7), with 10,000 bias-corrected 95% confidence intervals to test the significance of the indirect (i.e., mediated) effects moderated by fantasy proneness (Hayes 2013). As predicted, fantasy proneness was found to moderate the effect of mortality salience on purchase intentions for wallets and sunglasses. Similarly, fantasy proneness was also found to moderate the relationship between mortality salience and general attitude towards luxury goods. Fantasy through luxury consumption was found to significantly increase purchase intentions for luxury sunglasses and luxury wallets, and positively influenced general attitudes towards luxury goods. The overall moderated-mediation model was supported with the index of moderated-mediation for both product categories. We found support for a significant moderating effect of fantasy proneness on mortality salience on the indirect effect via fantasy through the consumption of luxury goods such that the indirect effect was strongest in those high in fantasy proneness for both product categories and general attitude towards luxury goods. In other words, in the MS condition, individuals higher in fantasy proneness were more likely to engage in fantasies related to the consumption of luxury goods than those low in fantasy

proneness. These fantasies led to greater purchase intentions of luxury goods and more favorable attitudes towards luxury goods.

Figure 2: Results of Moderated Mediation Model-Study 3
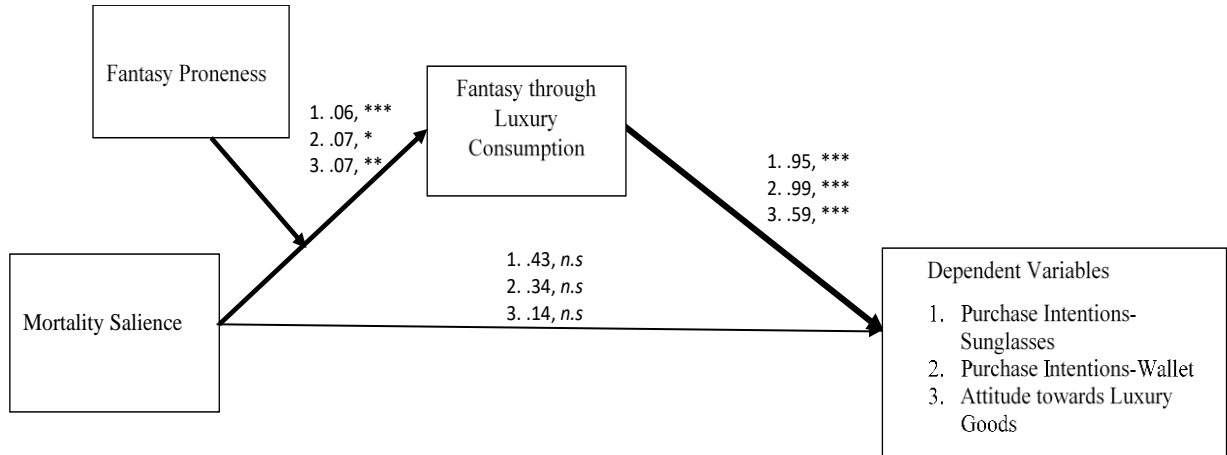
Index of moderated-mediation:

1. effect=.07, 95% CI= .016, .121
2. effect= .08, 95% CI =.036, .115
3. effect= .05, 95% CI= .016, .027

General Discussion, Limitations, and Future Research Directions

In three studies we tested the role played by fantastical thinking in influencing luxury consumption in the face of an existential threat. When faced with the potential for demise, participants leaned toward fantasy to confront "The Real". The role played by fantastical thinking had heretofore been alluded to, but never tested previously (Holbrook and Hirschman 1982). Thus, a primary contribution of our work is to bring the role of fantasy engagement and fantasy proneness to the forefront and empirically test the relationship of these constructs with luxury consumption.

In doing so, we also advance the role of fantasy as a coping mechanism that blunts the blow of a potentially threat of one's demise. While mortality concerns may abound in daily life, the practicality of utilizing death primes to spur consumption as a formulaic panacea for low product demand is questionable at best. However, an approach grounded in TMT allows us to understand cognitive mechanisms employed by consumers to manage the terror associated with mortality. Using a TMT approach, we can establish fantastical thinking as a critical cognitive process that is catalyzed by the presence of luxury goods due to the opportunities for fantastical engagement that such goods facilitate. Thus, a second contribution of our work is to extend TMT by proposing and testing the role played by fantasy as a cognitive mechanism for coping with the fear of death.

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When one's mortality is made salient through the media coverage of war or COVID pandemic, consumers have an increased need to escape from a terrifying outcome. The increased need to cope with the fear of death is met by fantasizing about possibilities offering escape. A proclivity to fantasize aids such cognition, and the ability of luxury goods to offer such engagement further ensures that those with the ability to imagine a better future through invoking fantastical imagery through products stand a better chance of assuaging fears stemming from heightened vulnerability to death. Our findings have macro implications by supporting the notion that, for some consumers, luxury goods may enhance quality of life and overall wellbeing—topics that have been discussed within the micromarketing literature (Cannon & Rucker 2019; Cristini et al. 2022; Pai et al. 2022).

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The Resilience of Street Hawkers in a Crisis: A Capability-Based Conceptualization

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Emerging economies are dominated by small unorganized retail, and street hawkers are integral to that retailing community. Street hawking is the act of selling items by hawkers, either by carrying them from place to place along the street or selling them in public places (Ikechebelu et al. 2008). Street hawkers are part of the social fabric in many emerging economies and function as essential members of the traditional distribution channel. Also, the hawkers' community represent the most vulnerable group among all the channel members, and the occurrence of any crisis event increases their vulnerability manifold. Most street hawkers operate on a tiny margin; thus, they also become a part of the bottom of the pyramid (BoP).

In the original introduction of the term, (Prahalad and Hart 2002) classified the BoP population in terms of their annual per capita incomes. Potential marketers and multinational enterprises (MNEs) have also indicated this market as a source of great profit and an opportunity to lift billions of people from poverty by making them collaborators in the business. Although this view has been widely accepted, literature has developed to challenge and enhance this to say that the inclusion of poor consumers must be selective. Also, the participation from the BoP population should not be constrained in terms of consumers only – rather, the best possible way to alleviate poverty and improve livelihood is to strengthen the role of the poor people as producers (Ramachandran, Pant, and Pani 2012). In another opinion, the BoP population is also defined as low-income but well above the poverty line – where people can buy a car priced at $3000 (Waeyenberg and Hens 2008). This absence of a proper boundary line defining the BoP population has also received well-structured criticism from the researchers. Since most of the mobile hawker's communities directly come under the low-income classification of the BoP population, the community forms a big cluster in BoP regarding employment generation, product availability, and last-mile delivery. However, existing management literature is yet to explore the hawkers' contribution towards the overall society, their survival measures, and how their efforts transform into the formation of societal welfare.

Street hawkers have been studied from myriad different perspectives, such as financial inclusions (Bruntha and Indirapriyadharshini 2015), policy (Smart 1986; Sharma 2016), ethics (Rahman et al. 2013), and transformative entrepreneurship (Giraldo, Garcia-Tello, and Rayburn 2020). Being an integral part of the unorganized retail channels, especially in the context of emerging economies, street hawkers have survived many crisis events and exhibited resilience. The present study is probably the first to explore the aspects of street hawkers' resilience in facing all those crises.

The study attempts to map the responses of the street hawkers to the larger crisis response model and use the resilience theory's extended capabilities to analyze the street hawkers' responses in facing the crisis. Semi-structured interviews were conducted to capture qualitative responses from the street hawkers. The interview transcripts were further analyzed using MAXQDA 2020 Analytics Pro data analysis software. Subsequently, the study attempts to understand the factors

which lead to the resilience of the hawkers' community. An attempt has also been made to use further the capabilities framework (Pettit, Fiksel, and Croxton 2010) to classify the identified factors into positive and negative ones. A total of eight factors that had a positive impact and three that negatively impacted the street hawkers' resilience were identified. Given the constraints within which the street hawkers operate and their critical role in BOP communities, the impact of the negative factors needs to be reduced, and positive ones need to be strengthened.

The study contributes by understanding the factors leading to the resilience of the lowest rung of street hawkers who play a critical role in the BOP communities. The study's findings are also expected to lead to policy recommendations that could be used further to support these street hawkers. This is one of the first studies which map street hawkers' behavioural traits to a crisis and links them to capability factors leading to resilience. The study is expected to contribute to a better understanding of street vendors who have been underrepresented in research.

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Consumer Wellbeing: The Indirect Impact of Private Label Brands on Quality of Life

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This research was designed to reveal how the presence (or absence) of private label brands influences the price-quality nature of markets in durable product categories, and thus how private label brands contribute to (or reduce) consumer wellbeing. Specifically, it investigates whether markets having private labels (PLs) exhibit more positive relationships between price and quality than markets where private labels are not present. For the purposes of the present work, a PL is defined as one sold by a single retailer, which may have many retail outlets; and national brands (NBs) are defined as those available from multiple (though not necessarily all) retailers.

To conduct the analyses, price and quality measures were drawn from independent product tests conducted in the U.S. over a period of more than eight years. Then, price-quality (PQ) correlations were computed for each separate product category. Next, an assessment of the market structure in terms the price-quality impact on consumer wellbeing was conducted. A higher correlation between price and quality observed in those categories with PLs relative to those categories without private labels would be consistent with higher levels of consumer wellbeing for reasons elaborated next.

The questions that arise naturally are, Why should we care about private labels? and, How might they contribute to the quality of life and wellbeing of consumers? We address these by noting that the increasing popularity of private labels (PLs) reflects the value that both retailers and consumers derive from them (Amaldoss and Shin 2015; Bonfrer and Chintagunta 2004; Nasser, Turcic, and Narasimhan 2013). Retailers are drawn by their attractive margins and their ability to foster store-level patronage; on the other hand, consumers appreciate the favorable combination of price and quality. Indeed, while prices of PLs are typically substantially lower than NBs, their quality is often at par with them (Boyle, Kim and Lathrop 2018). This inverted price-quality relationship may seem to contradict the received wisdom that price signals quality, thus eroding consumer wellbeing. Despite the apparent contradiction, PLs may nonetheless actually contribute to market efficiency, and hence to consumer wellbeing (Tiboldo et al. 2021).

Broadly speaking, an efficient market is one having an absence of (or relatively few) inefficient brands; an inefficient brand is one that offers either lower quality than another brand at the same price, or the same quality as another brand but at a higher price (Kamakura, Ratchford and Agrawal 1988). One indication of market efficiency is a positive price-quality (PQ) correlation. Previous research has reported that the PQ correlation in markets is substantially lower than ideal from a consumer welfare perspective (Olbrich and Jansen 2014). That is, where consumers might reasonably expect higher prices to signal higher quality, their expectations are often undermined by actual market structures. This work investigates the impact of PLs on market structures in terms of PQ correlations.

To do so, data from 14,234 durable products tested by an independent organization in the U.S. over an eight-year period were analyzed. From 276 product tests, information about each

brand's price and quality was extracted, and on the basis of the brand name each was coded as either a NB or a PL. For each of the product tests, a PQ correlation (Spearman's rho) was computed, separately for those tests containing at least one PL and for those tests containing only NBs. If multiple tests of the same product occurred at different times, the correlations for each test were averaged. Then, the results from each product category were aggregated and the grand mean correlation was computed.

Overall, the PQ correlation was larger than when PLs were present than when they were not present. In summary, when every product category tested was analyzed, support was found for the premise that the PQ relationship is stronger in categories having PLs. Simulations confirmed that the difference in correlation was attributable to the presence or absence of PLs.

The results of the present work are consistent with the premise that markets in which PLs are present contribute to a greater degree to consumer wellbeing than those markets in which PLs are absent. Previous research has revealed that consumer wellbeing is directly enhanced by PLs because they tend to provide consumers with offerings that are of relatively high quality at attractive prices. Indeed, consumers wellbeing can be improved even if they are not PL shoppers, as NBs often reduce their prices in response to the presence of PLs. In the present work, a case is made that the wellbeing of consumers can be enhanced indirectly if the presence of PLs induces a greater degree of price-quality alignment in the market. Then, consumer wellbeing can be enhanced financially, as shoppers actually "get what they pay for." However, when PQ correlations are higher, quality of life may be hedonically improved because consumers can shop confidently, with greater assurance that when they pay a higher price they are more likely to purchase a brand of higher quality.

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Public Health Concerns, Cannabis Policy, and Consumer Cannabis Behavior (Re) Shaping Cannabis Marketing Systems

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Introduction

The impact and consequences of society on marketing systems represent the core of the macromarketing discipline (Hunt 1981; Witkowski 2015). The case of the United States of America (U.S.)'s cannabis marketing system is remarkable as it has adapted and transformed itself in responses to societal changes (Witkowski 2015). Once an illicit marketing system, the cannabis marketing system has normalized its existence in response to societal change (Witkowski 2015). Certainly, the cannabis marketing systems in the U.S. have reached levels that were unthinkable ten years ago; for instance, in 22 states and Washington D.C. cannabis is legal for recreational purposes (Hansen et al. 2023). Popular support throughout the years for cannabis legalization and policy makers who responded accordingly (McCarthy 2018) contributed to the normalization and blooming of the cannabis marketing systems. Also, the positive effects of the cannabis industry cannot go unnoticed; for instance, Colorado has collected more than 1.2 billion in tax revenues between 2014-2021 and Washington state has collected more than $3 billion (Marijuana Policy Project 2023). In January 2022, the legal cannabis industry employed more than 420.000 people (Barcott and Whitney 2022). The legal U.S. cannabis market is expected to grow to $47.3 billion by 2028 (Kees et al. 2020).

In parallel with this remarkable growth of the cannabis industry, since recreational sales were legalized by Colorado and Washington in 2014, there have been increased concerns and debates among public health experts with regard to the social and health benefits and risks associated with cannabis consumption (Kees et al. 2020; Volkow et al. 2016; Centers for Disease Control and Prevention 2018, National Institute of Health 2018), especially as they relate to the use of high-potency (i.e., high-THC[1]) cannabis products. Should these concerns and recent policy initiatives - to curb such cannabis consumption - be disregarded, the support for cannabis legalization could be overturned anytime; as (Witkowski 2015) argued, the remarkable support for cannabis legalization could be reversed. Perhaps, we reached a point in time where the cannabis marketing systems need to (re)shape themselves to ensure their continued positive effect on the industry, states' revenues, and society.

This research makes two primary contributions. First, we aim to contribute to the macromarketing literature by focusing on three important areas relevant to (re)shaping the cannabis marketing systems in the U.S. The purpose is to review the current literatures on public health concerns and policy related to high-potency cannabis and examine consumer behavior associated with the high-THC cannabis consumption, all of which are intended to help cannabis marketing systems adapt themselves so the cannabis industry can continue growing in a socially

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[1] THC = Tetrahydrocannabinol is the principal psychoactive constituent of cannabis

sustainable manner. Second, policy makers have considered measures to decrease consumption of high-THC products without a thorough understanding of the cannabis consumers. In fact, "research on cannabis is nonexistent" in the public policy and marketing areas (Kees et al. 2020). This research aims to fill this gap in the marketing and public policy literature by examining who the consumers of high-THC products are.

Public Health Concerns, Cannabis Policy and Consumer Behavior
The level of THC concentration in cannabis products is often referred to as 'potency'. The established cannabis marketplace offers products (extracts and oils) that are reaching historic levels of THC concentration (WA State Liquor and Cannabis Board 2019). It appears that the THC content of cannabis (in its dried herbal form referred to as 'flower') has increased significantly over the past three decades. To illustrate, THC levels in flower in 1995 were found to be approximately 4 % (ElSohly et al. 2016) whereas studies found in the past 5 years approximate potency of flower to be typically between 17- 28 % (Stuyt 2018). This is especially the case in North American markets, where the THC content has also reached up to 80 to 90% (even higher) in high potency products such as oils or waxes also known as 'dabs,' 'wax,' and 'shatter' (Mehmedic et al. 2010; ElSohly et al. 2016; Stogner and Miller 2015; Stuyt 2018).

While there are mixed findings that offer insufficient evidence for either positive or negative health effects of cannabis consumption (Cousijn et al. 2018), there is a line of recent research suggesting that the frequent use of cannabis products with higher THC concentrations poses various risks to physical (respiratory, cardiometabolic, cancer, prenatal complications, injury, addiction) and mental health (psychotic disorders, paranoia, marked effects on memory, and dependence) (Volkow et al. 2014; Hall and Degenhardt 2015; Freeman and Winstock 2015; Di Forti et al. 2015; Leos-Toro et al. 2020). Recent warnings, by researchers and physicians, of mental health risk of cannabis products with high-potency levels were issued in the Pacific Northwest; the availability of dabs[2] and/or other substances that are highly concentrated are viewed as "a quiet but growing threat to public health, especially among young adults and teenagers" (Furfaro 2022).

States that have passed legislation related to potency include Vermont caps on high THC concentrations (at 60 % THC) and NY and Illinois have passed bills that impose higher taxes on cannabis products with higher THC potency (IDOR 2023); since 2021, bills related to THC potency have been introduced in Washington, Montana, Colorado, Massachusetts and Florida (Schroyer 2021). Additionally, there appears to be interest in discouraging consumption of high-THC products at the federal level as illustrated in a bipartisan report from the Caucus on International Narcotics Control, Chaired by Senators Cornyn (R-TX) and Feinstein (D-CA), recommending that the National Institutes of Health and Food Drug Administration should develop recommendations on if, and how, THC potency should be capped. Moreover, two bills concerning the potency of marijuana products have been introduced (although not passed) in Washington. The 10 THC Bill (HB 2546) introduced in 2016, specified that cannabis processors

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[2] A highly concentrated form of cannabis is called a dab; this is produced by extracting the psychoactive compound THC from cannabis plants. A typical cannabis flower averages around 20% THC; nevertheless, some dabs sold in the state of Washington contain as much as 90% (Furfaro 2022).

are prohibited from processing, packaging, possessing, delivering, distributing, and selling marijuana concentrates with a THC concentration greater than 10 %, except when the marijuana concentrates are intended for medical purposes (Washington State House of Representatives 2020). The 30 THC Bill (HB 1463), introduced in 2021 (and reintroduced in 2022), addressed serious mental health consequences of high-potency cannabis products by regulating the sale of cannabis concentrates.

An exploratory study showed that THC potency *is* among the factors that consumers consider when buying cannabis; furthermore, this predilection was evident for older and frequent consumers to a higher degree. Therefore, we conducted an experimental study to examine how THC levels interact with age and frequency to impact consumers' purchase intentions and willingness to pay. One hundred and twenty-one individuals participated; they were randomly assigned to one of the two experimental conditions: high THC (25 %) and low THC (10 %). The Model 2 of Hayes' (2013) PROCESS results showed that overall consumers (regardless of their age) expressed higher purchase intentions for high (vs. low) THC; nevertheless, these effects were statistically stronger for older individuals. For instance, Baby Boomers were more likely to purchase high THC products, especially those who reported higher levels of cannabis use frequency. Moreover, consumers expressed higher willingness to pay for high THC; however, these effects were statistically stronger for older individuals, especially for those in the high frequency category. For example, the Baby Boomers cohort showed a higher willingness to pay for high THC cannabis products; additionally, among those who reported higher levels of cannabis use frequency, their willingness to pay increased significantly for these products.

Cannabis Marketing Systems and Policy Implications
The sales of high-THC cannabis flower dominate the legal cannabis market (Smart et al. 2017); the THC content has increased significantly over the past three decades in North American markets and although vulnerable populations may experience potential benefits, the possibility to incur novel toxic effects is real (Volkow et al. 2016). The cannabis product landscape has changed dramatically, with strains of higher THC potency or new ways of administration and the breadth and depth of product assortments that have proliferated to an unexpected degree (Volkow et al. 2016; Witkowski 2015). Consumers' risks and benefits perceptions are rapidly changing as well and consequently, our limited knowledge may only apply to the ways in which cannabis products were used in the past (Volkow et al. 2016). Marketing systems react to social changes (Layton 2015) and the cannabis marketing systems represent one notable example. Cannabis producers therefore should consider changing the product concentration in response to increased public health concerns, policy/tax initiatives, and consumer behavior. This research essentially provides insights into why the cannabis producers should reformulate their products to bring the THC levels down. Some cannabis retailers and suppliers warn that bans or increasing taxes on certain products could encourage the development of an illegal market, which obviously would be more difficult to monitor and control (Furfaro 2022). Nevertheless, drawing from the sugar-sweetened beverage tax literature (Claudy et al. 2021), one possible industry response to a THC-based tax is product reformulation; research shows that this response to the introduction of a levied sugar tax in the United Kingdom produced the best health outcomes (Briggs et al. 2013).

Packaging and labeling are important elements of high-potency cannabis products. Some states require cannabis product packages to include universal symbols that show the presence of THC

(Kees et al. 2020). Many states in the U.S. do require that cannabis packaging includes the percentage of THC levels in a product (Kees et al. 2020). However, cannabis marketers from all states, where cannabis consumption is legal for recreational purposes, should devote their efforts toward a universal packaging practice accompanied by accurate potency levels or percentage of THC. Helping consumers make informed decisions as they relate to the safe consumption of cannabis products should be a priority for the cannabis marketers. It is always important to remember the core of macromarketing, which refers to the impact and consequences of marketing systems on society and the impact and consequences of society on marketing systems (Hunt 1981). Just as the social changes in the U.S., over the past decade, have positively influenced the cannabis industry and contributed to its normalization, the public health concerns, policy considerations, and cannabis consumer behavior can reverse these effects; the tobacco, alcohol, and sugar-sweetened beverage industries provide great lessons in this way.

As far as the cannabis promotion strategies are concerned, cannabis products cannot be advertised by many traditional means; also, there are different regulations in place for advertising cannabis in every state (MSI MarketSmith 2023). A noteworthy promotional development occurred due to social media. A study, where an analysis of the Instagram posts with cannabis-related hashtgas was conducted, showed that 43 % posts were explicit about cannabis (e.g., images of cannabis, cannabis advertising) (Cavazos-Rehg et al. 2016). While cannabis marketers can use social media as a way to promote their products, they should also consider using this avenue to disclose relevant risks linked to the frequent use of high-potency cannabis products, especially to various segments of consumers such as elderly and frequent users, who might have a higher preference toward high-THC products due to, perhaps, their misperceptions relative to the health risks and benefits. Furthermore, lessons from the food industry can be instructive here, as food marketers, in their efforts to address increased concerns about obesity, have engaged in various forms of corporate social responsibility. For instance, major food companies committed their advertising efforts toward healthier food products and/or messages that encourage good nutrition or healthy lifestyles (Council of Better Business Bureau 2016). Along the same lines, cannabis producers should consider marketing/education strategies to raise consumers perceptions of risks. The focus should be on disclosing important risks, associated with the consumption of high-potency products, along with medical benefits, according to available research. It is important to encourage safe consumption given the need for more evidence that could speak to the health effects, whether they are negative or positive.

The current research suggests that policy makers aiming to move forward with policy discouraging or restricting the consumption of high-potency cannabis (e.g., taxes) need to have an integrative view that considers the ongoing research/mixed findings on the risks and health benefits associated with high THC cannabis consumption. It is also important to better understand how and why certain individuals purchase and consume these (purportedly) risky products. Consumer education campaigns might be more useful as opposed to cannabis tax increase; nevertheless, any such campaign should understand the segments of cannabis consumers and targeted messaging should be developed to provide persuasive information to those individuals who are at risk (Peattie et al. 2001; Moore et al. 2002). Our experimental study shows that older and frequent users tend to prefer high-potency cannabis products and would be willing to pay a higher price for these products. Public policies thus should evolve and the

cannabis marketing systems should be (re)shaped to ensure the negative health effects are minimized and potential benefits are maximized (Volkow et al. 2016).

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Entrepreneurship Orientation and Firm Performance: The Mediating Effect of Dynamic Capability and Government Support to SME Businesses In Ghana

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For the past decades, Entrepreneurship Orientation (EO) has received the most investigation regarding the connection between EO and performance (Isichei et al., 2020; Ltd, 2020; Meekaewkunchorn et al., 2021; Saeed, Yousafzai, and Engelen 2014). The results are still conflicting and inconclusive despite the outstanding research on the relationship between EO and performance (Su, Xie, and Wang, 2015). According to some studies that hold the mainstream perspective, EO and performance are favorably correlated (Wiklund and Shepherd 2003). According to some, the impacts of this association (Renko, Carsful, and Brännback 2009; Gruber-Muecke and Hofer, 2015) are unfavorable and insignificant. However, empirical studies by Zahra and Covin (1995) and Wiklund (1999) show that entrepreneurship orientation impacts firm performance over time. To uncover business opportunities and compete with other firms, businesses must have an entrepreneurship orientation. Thus, SMEs will achieve higher firm performance if they are innovative, risk-taking, proactive, autonomous, and have competitive aggressiveness in the marketplace. (Li et al. 2009; Akbar et al. 2020)

This study seeks to investigate the current situation of entrepreneurship orientation in Ghana and to propose a model where Government Support (GS), including government initiatives such as the promotion of business expansion and activities that are in line with the goals of SMEs strategy, assistance of small and medium-sized enterprises (SMEs) in overcoming financial and non-financial obstacles that impede business operations while enhancing their entrepreneurial practices; and Dynamic Capability (DC), which also, seeks to explain how and why businesses survive in a circumstance where technology, society, and markets are changing so quickly while others are failing (Leemann and Kanbach, 2022; Akenroye et al., 2020) are used as mediating and moderating variables to stimulate economic growth.

Considering the point of variation in reporting the findings between Entrepreneurship Orientation and Firm Performance (EO - FP) relationship from the existing literature (Rauch et al., 2009), the study investigates the mediating effects of dynamic capability on the relationship between entrepreneurship orientation and firm performance; and the moderating effect of government support on small and medium enterprises (SMEs) in the Ghanaian business environment in Sub- Saharan Africa. Specifically, this study aimed: (1) to examine the effect of Entrepreneurship Orientation (Innovativeness, Risk Taking, proactiveness, competitive aggressive, and autonomy) on Firm Performance in SME Businesses in Ghana; (2) To test the mediating role of Dynamic Capacity (Sensing and Learning Capabilities) in the effects of EO (Innovativeness, Risk Taking, proactiveness, competitive aggressive, and autonomy) on firm performance; (3) To determine the moderating role of Government Support in sensing and Learning Capabilities on Firm Performance.

The study employed a quantitative methodology using Structural Equation Modelling (SEM) to test the proposed conceptual model. The researcher sought and received approval from company owners that allowed the use of their facilities and, in some cases, the companies' premises for managers to respond to the questionnaires outlined in the study. For this study, a total of 290 questionnaires from SMEs were collected based on the following criteria: (i) firms had employed a minimum of five and a maximum of 500 full-time workers (Boso et al. 2013; Goedhuys and Sleuwaegen 2010; Wiklund and Shepherd 2011); (ii) firms with a minimum of 5 years business operation experience (Morgan et al.,2012); (iii) firms that had the complete contact information of the founder for the chief executive officer (Khavul et al., 2010); (iv) the educational level of managers (Śmietańska 2020; Aguinis et al. 2022); (v) the age and firm size (Coad 2018; Hansen 1992; Li et al. 2011; Loderer and Waelchli 2010); (vi) firms that were owned and controlled by individual or group of entrepreneurs with at least 50 percent ownership (Goedhuys and Sleuwaegen 2010). These firms were in the southern part of the country including Kumasi, Accra, and the Eastern Region of Ghana.

The study contributes to entrepreneurship orientation in four (4) different aspects: First, it develops a model that integrates Dynamic Capability and Government Support as both mediators and moderators respectively, considering the knowledge-based economy (Sharif et al. 2023; Hassan et al. 2023), which can stimulate economic growth, thereby creating opportunities for SMEs through government policy initiatives in Ghana. Second, the existing measurement instruments of entrepreneurial orientation (Covin and Slevin 1989; Miller and Friesen 1982) are empirically tested and applied to SMEs operating in Ghana to provide a context for future research opportunities for SMEs in the changing world of business today. Third, the study adds to the few empirical works focusing on government support and business owners' ability to adapt to the dynamic capabilities for entrepreneurship orientation. (Feranita et al. 2020; Moreira et al. 2022; Veronica et al. 2020; Zaato et al. 2020; Akenroye et al. 2020; Kriswijayanto et al. 2022; Pigola et al. 2022) And lastly, the study also follows calls for increased methodological rigor by analyzing large-scale data with Structural Equation Modeling. (Barnes et al. 2016; Kollmann et al. 2022)

For the policy side of the research and the government support, it is highlighted that policy papers issued by the government in support of initiatives in Ghana, comprising a draft Policy Paper on Micro and Small Enterprise Development, Strategies and Action Plan by the Ministry of Private Sector Development should include an aspect of dynamic capability like learning and sensing capacity to enhance the business opportunities of SME operators in Ghana. In addition, the President's Special Initiative on certain sectors of the economy like garment, textile, and entrepreneurship, which are roll out by the state, should include and encourage organizations to acquire information that can help better understand customers' needs (Zairi 2012) for the performance of their business.

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From Stones to Electrons: The Evolution of Homo Sapiens

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Speaking extemporaneously at the 2015 Macromarketing Conference's plenary session, Bob Lusch set forth an agenda for macromarketers. Specifically, he encouraged us to take a "Long Macro View" by exploring four innate human propensities over the past 40,000 years:
  1) engaging in exchange with each other,
  2) creating tools or technology,
  3) making choices that have unseen costs, and
  4) developing institutions to coordinate exchanges and other interactions (Lusch 2017).

Four well-respected macromarketing scholars have each expanded on one of these propensities (Kravtes 2017), (Layton 2017), (Schultz 2017), (Laczniak 2017).

Consistent with Lusch's time frame, we investigate Lusch's propensities from an *evolutionary perspective*. We start by assessing the world into which *Homo Sapiens* arrived – a world that was inhabited by earlier Hominins. We begin with our terms, then turn to our analysis: (a) Exchange may be voluntary or involuntary (e.g., robbery). Exchange may be between kinsmen and involve a *quid pro quo* (e.g., Christmas gifts), or it may be between companies – again voluntarily or involuntarily. To clarify the distinction between levels of exchange, we use the term **Trade** to denote a larger scale than Exchange. Voluntary Trade typically has an explicit or implicit pecuniary component (in currency or barter). Specialization enables production of surplus output that can be exchanged or traded. Economists refer to this as a division of labor; the potential surplus is dependent on tools, technology, and Knowledge (Layton 2009); (b) We use the term **Knowledge** rather than "tools or technology" because it embraces more than mechanical devices, it also includes language, medicine, and other intellectual endeavors. Many elements or outputs that comes from Knowledge can be exchanged or traded; (c) Some actions create *unseen* **Costs**; other actions may create unforeseeable **Benefits**; (d) Human groups typically have **Leaders** who may focus on a single topic or who may have broader authority. **Institutions** (which have Leaders) are formal methods of control.

We will develop the *Dark Side* of Trade, Knowledge, Costs and Benefits, Leaders and Institutions. Our basic argument is that Lusch's four propensities have had – and continue to have – both positive and negative impacts on society and on significant societal segments.

Prehistory
Homo Sapiens did not enter a *tabula rasa* 40,000 years ago; we overlapped with *Homo Neanderthals* for tens of thousands of years. A fundamental contribution of our paper is our utilization of data that has only recently been published in scientific and archeology journals. This expansion in our understanding reveals that Neanderthals used a division of labor, had some

Leadership, had considerable Knowledge, engaged in intra-group Exchanges, and incurred Costs – foreseen and unforeseen; they may also have experienced unforeseen Benefits.

H. Neanderthal appeared some 800,000 years ago (henceforth we compress our notion as 800Kya). They had stone tools and wooden spears, generated fire, built cave hearths, crafted simple clothes, used medicinal plants, created cave art, and were seafaring. In short, they had substantial **Knowledge**. We infer a division of labor within hunter-gather groups, with weaker members engaged in gathering edible flora, while stronger members focused on hunting fauna. What is clear from a long-standing archeology literature is that over thousands of years *H. Neanderthal* became increasingly skilled across several dimensions.

A recent publication documents that, by 125Kya, some H. Neanderthal were apex predators who successfully hunted straight-tusked elephants – the largest terrestrial mammals of the Pleistocene, weighing 13 metric tons (Gaudzinski-Windheuser 2023). A large Neanderthal population remained in the same 61-acre area for over 2,000 years. The authors note that hunting "elephants were part of the cultural repertoire of Last Interglacial Neanderthals… The nutritional yields of these well-documented butchering activities …suggests that Neanderthals were less mobile and operated within social units substantially larger than commonly envisioned."

There was a considerable geographic range of skilled Neanderthal groups (northern Germany, France, and Saxony have been documented).

Neanderthals were clearly well organized for what must have been dangerous hunting: they were **Knowledgeable** about their prey, they must have occasionally incurred serious physical **Costs**, and had to have Leaders – at least for hunting. Given large group size, there must also have been intra-group divisions of labor – so there would have been intra-group Exchanges. Neanderthals were self-sufficient for thousands of years before modern *H. Sapiens* arrived.

Modern Homo Sapiens
Diasporas out of Africa by modern *H. Sapiens* occurred some 70Kya –50Kya. From East Africa, they reached Arabia, spread to South Asia, Maritime South Asia, and Oceania between 65Kya – 50Kya. East Asia and North Asia are thought to have been reached about 45Kya. Some evidence suggests that, using the Bering Land Bridge, *H. Sapiens* may have reached the western hemisphere during the Last Glacial Maximum.

Recent research reveals that modern *H. Sapiens* arrived in Europe about 54Kya – some 10Kya – 14Kya before *H. Neanderthal* died out (Slimak 2022). There is no evidence of slaughter, or pandemics, eliminating the older specie. Rather, *H. Sapiens* and *H. Neanderthal* overlapped for ten thousand years or more; this suggests that we may have learned from them by observation, and/or through centuries of interacting – and interbreeding. Estimates are that some 20% of *H. Neanderthal* genome is present in contemporary populations.

H. Sapiens did not enter a *tabula rasa*; there were already tools, hunting techniques, and other activities from which later arrivals could learn or could independently improve. Here we focus on the *Neolithic* age from 12Kya – 5Kya, postponing earlier and later ages to a full paper.

Human ingenuity blossomed during the Neolithic age. We focus on remarkable examples of Knowledge, Leadership and possibly Institutions. Presenting our analysis chronologically, between 11.5Kya – 10Kya, *H. Sapiens* constructed the world's first – and largest – monoliths in the foothills of the Taurus Mountains. Göbekli Tepe consisted of several large circular structures supported by 50-foot high limestone monoliths featuring intricate carvings of humans and wild animals, and stone cisterns to collect water – indicating at least a semi-permanent population. Its creators, hunter-gathers who used flint knives to cut limestone, subsisted on local cereals and by hunting gazelles. Göbekli Tepe's creators had an exquisite understanding of tools, techniques, and artistic skills; in short, they had considerable Knowledge. The magnitude of construction was so great that there must have been Leaders to give precise directions to workers. Importantly, there are at least 11 other Tepes in Turkey from the same time period; we infer that there was an interrelated society stretching over thousands of square miles.

Today we are familiar with stone circles. Not well known is that there are several large stone circles in Europe that predate Stonehenge by thousands of years. Amongst them are a submerged stone circle off the coast of Israel dating from 8.6Kya; a stone circle in the Sahara and a "Spanish Stonehenge," both dated from 7Kya; and one in France from 6.5Kya. Stone circles involved religious ceremonies; they had a social purpose of bringing together compatriots from some distance. We see a possible informal Institution, substantial architectural Knowledge, obvious divisions of labor, Exchanges within large groups and perhaps Trade with outsiders.

Arguably the most famous monolithic stone circle is Stonehenge in Salisbury, UK. First erected 5.2Kya, it went through four "renovations" up to 3.7Kya. It is aligned with the summer and winter solstices. Most of the stones, each weighing 25 – 50 tons, came from 16 miles away; considerable labor and mechanical ingenuity were required to haul them. Igneous bluestones (one – two tons each) were brought from Wales 140 miles away. They ring when struck, hinting at mystical properties. There is evidence of people travelling considerable distances for ritual gatherings at Stonehenge – apparently social bonding.

At the other extreme of construction complexity are thousands of *kites* that were neither heavy nor high – but that were quite long. Thousands of these hunting traps were erected in the post-glacial period (10Kya – 6Kya) in what today is Saudi Arabia and Iraq. The broad time frame and the large area over which kites were spread reveals shared Knowledge of the basic concept (Fradley 2022). Kites consisted of stone walls some 4 kilometers long. Herds of gazelles, deer, and other non-domesticated animals were driven through a gradually narrowing field until they came to an enclosure where they were trapped and slaughtered. The people who built these structures had an organized a workforce and Knowledge of their preys' behavior. They were able to determine the rate at which to kill trapped animals, and how to divide the meat. In short, there was Leadership, Knowledge, and a division of labor (hence Exchange between group members). Intriguingly, a 9Kya shrine was recently found in Jordan's eastern desert "that was likely used in the practice of religious hunting rituals" (Lanese 2022)**.** Quite amazingly, the site included "an architectural model of a desert kite."

Next Steps
Our next step will be an analysis of the Bronze Age – and with it the growth of cities and their large Institutions (religious buildings and royal palaces), and the development of mathematics

and written language (the earliest being the Epic of Gilgamesh).

Moving past the Bronze Age, wars of conquest became somewhat common; for example, Darius the Great, ruler of Persia, tried to conquer Greece. Large scale wars ended many lives, and sometimes empires; crops were often ruined, etc. Well into the Christian era, Attila the Hun, Genghis Khan, and others swept through Asia, destroying cities, and often empires. While they carried off the spoils of war, they left death and desolation in their wake (Grousset 1939). This is a "Dark Side" of *involuntary* "Trade." There was also a positive side of Trade, as exemplified by Marco Polo's travels to and from China in the late 1200s AD.

Knowledge – especially *incorrect* "knowledge" – has a Dark Side. Examples include burning of "witches" at the stake for causing whatever perceived tragedy. More recently, Semmelweis proved that the incidence of deaths during childbirth could be drastically reduced by requiring doctors to disinfect their hands in obstetrical clinics. Unfortunately, doctors rejected his proof as quackery. It was not until the 1890s when Louis Pasteur's Germ Theory of Disease arose, and an awareness of viruses, that common sense prevailed.

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Political Macromarketing Perspective in the case of Brazil's Lack of Development Growth

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Introduction

Why has Latin America continued to lag behind the North in terms of development? In the context of developing countries, there is a need for marketing researchers to engage in Political Macromarketing research, approaching the understanding of how economic growth affects social welfare and quality of life (Mittelstaedt et al. 2014; Mittelstaedt, Kilbourne, and Mittelstaedt 2006; Shultz et al. 2012; Benton, Jr. 2022).

Moreover, even though the consumer occupies a point of microanalysis, macroanalysis of government policies' role in shaping the necessary conditions for quality of life can bring significant benefits to consumer well-being, consequently contributing to improvements in social welfare. As George Fisk (1981) points out, "the word macromarketing implies that we care about the consequences of large marketing systems on large social issues," which embrace environmental concerns, national economic development, the impact of marketing on quality of life, and marketing efficiency in assembling and allocating resources.

Therefore, we focus on Brazil's Macromarketing issues to demonstrate how development constraints are related to political mismanagement that contributes to keeping this country on an emerging path and influencing Macromarketing aspects of the society.

Brazil's Sustainable Development Compared to Other Latin America Emerging Countries

Brazil, Chile, Colombia, Mexico, and Peru are considered emerging economies, except for Argentina, a Standalone Country (MSCI 2023). We address Latin American emerging countries' development using the Sustainable Society Index (SSI), which the Sustainable Society Foundation developed in the Netherlands in 2006 (Saisana and Philippas 2012). SSI has been applied to preview Macromarketing research analyzing sustainable development in developing countries (Peterson, M., and Zehra, S. 2018; Sepulveda, Shultz, and Peterson 2023).

Brazil's SSI scores are better than the global average regarding having enough food and clean water, safe sanitation, a healthy lifestyle, population growth, renewable water resources, energy use and conservation, and greenhouse gas emissions. However, its public debt and employment scores do poorly, displaying levels below those of other Latin American emerging countries (see Figure 1).

Figure 1. SSI for Latin American emerging countries
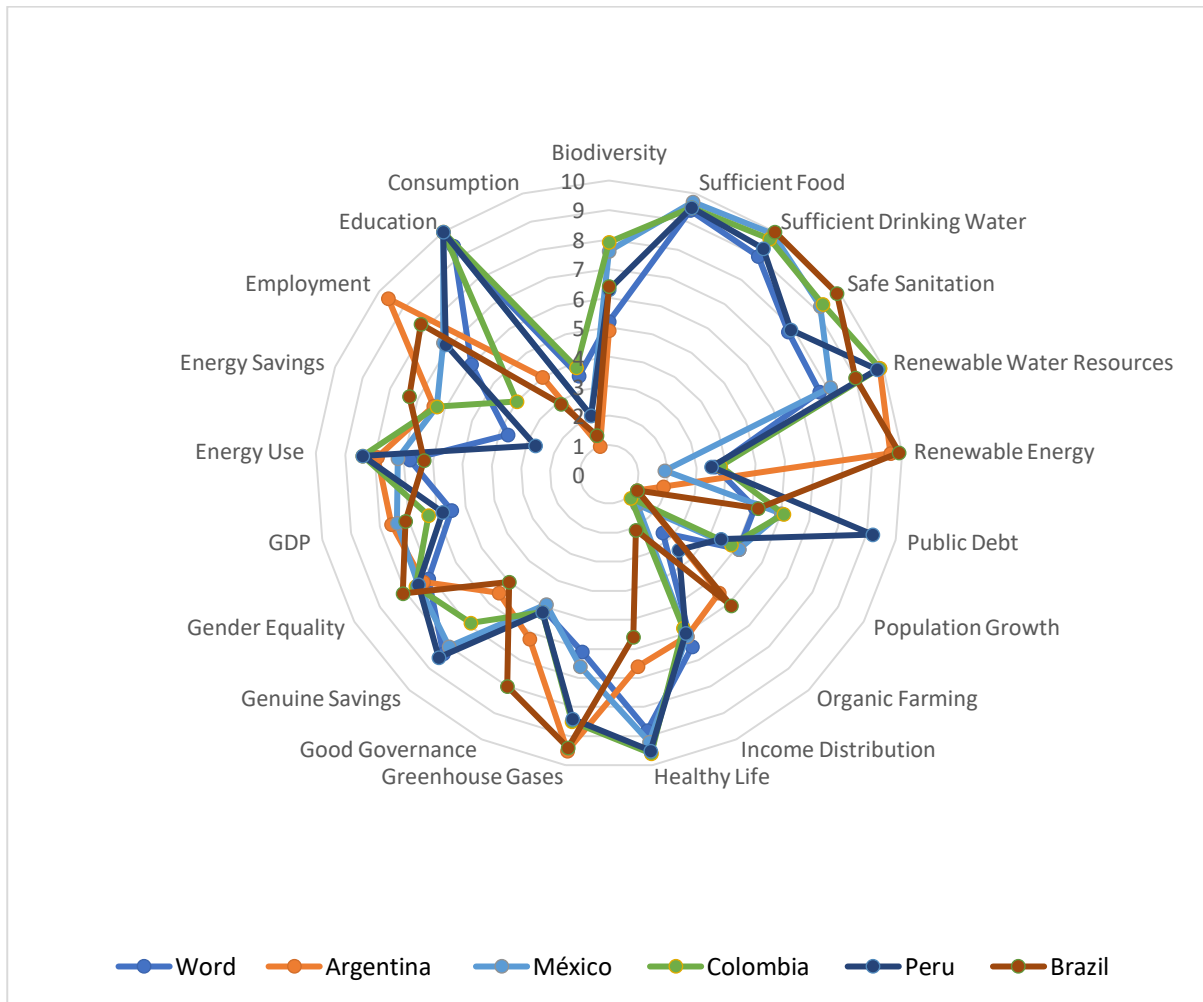
Source: Sustainable Society Index, 2018

Political Macromarketing

Despite several problems related to social inequality, Brazil has a portfolio with an arrangement of public policies whose objective is to encourage growth and economic development. Such public policies are developed and directed towards monetary transferences to individuals, or I-frame public policies.

Nonetheless, economic researchers have questioned the effectiveness of I-frame public policies arguing that "even when I-frame interventions are highly effective, their impact may be modest" (Chater e Loewenstein 2022). In other words, I-frame public policies' impact on social welfare is not sustained to generate long-term benefits and change the quality of life for those who receive public assistance.

For instance, families in poverty (with monthly family income per capita between R$ 105.01 and R$ $210.00) and those in extreme poverty (with monthly family income per capita up to R$ 105.00, one hundred and five reais, one hundred and five reais and one cent and two hundred and ten reais) (MDASFS 2023) can participate as beneficiaries in the Bolsa Família Program (BFP), and the Auxílio Brazil Program (ABP). December 2022 set a historical record for the BFP, reaching 21.6 million beneficiary families. The investment surpassed BRL 13 billion, with an average benefit of BRL 607.14 for each family (MDASFS 2022).

Nevertheless, comparing the levels of poverty and extreme poverty in Brazil since the creation of non-taxable income distribution policies, there is no significant difference in decreasing inequality. Even with public policies of continued provision, the results achieved are still far from reaching levels of poverty reduction and schooling increase (de Souza, Hecksher, and Osorio 2022).

Moreover, the aforementioned public policies are derisory compared with other Brazilian investments. For example, in December 2022, the Federal Senate approved an increase in the remuneration of the Federal Supreme Court ministers, the Federal Public Defender, other public defenders, and the Attorney General of the Republic. Considered super salaries, the current allowance of BRL 39,293.32 will increase to BRL 41,650.92 as of April 1st, 2023, R$44,008.52 as of February 1st, 2024, and R$46,366.19 as of February 1st, 2025. The three bills will be sent for presidential approval (Junior 2022).

Even in the case of the most extreme poverty, according to data from the National Household Sample Survey (PNAD Contínua) 2022, over 60% of people would be poor if welfare programs did not exist and remain poor despite their existence. In the case of the highest poverty line, less than 10% of those who would be poor without social programs are no longer poor due to transfers (de Souza, Hecksher, and Osorio 2022).

In this sense, Brazilian public policies' ineffectiveness is an example of what Dercon (2022) argues that the difference between prosperous nations and others that are behind the schedule of growth is the lack of "a development bargain," where countries and the elite in power are committed to the development, using the available resources in order to increase welfare.

Final Remarks and Future Research
We propose that the Brazilian government policies' inefficiency can exemplify how government plays a central role in shaping the necessary conditions for consumer welfare and quality of life (Benton 2022; Sepulveda, Shultz, and Peterson 2023). Therefore, this research resonates and contributes to marketing research by applying a Political Macromarketing approach to explore how political mismanagement impacts marketing systems and consumer welfare (Shultz and Peterson 2019; Amore and Corina 2021; Benton 2022).

Moreover, we propose that the disparity between the monetary amounts allocated to Brazilian public policies focused on reducing poverty and social inequality and other public expenditures is an example of a lack of development bargain (Dercon 2022). Brazil's example demonstrates the absence of commitment of those in power and a limited vision that shows the search for the welfare of specific interest groups.

Therefore, our focus is on political mismanagement, which is one factor contributing to the need for development. However, it is essential to note that it is just the starting point of this analysis. The other institutions, or "catalytic institutions" as named by Shultz et al. (2012), need to be further explored in the search for solutions to problems related to social welfare. Macromarketing researchers can guide this discussion by the understanding that there is a need for an "elite bargain" (Dercon 2022), representing a credible commitment of the catalytic institutions toward the well-being of nations like Brazil and other emerging economies.

According to Dercon (2022), one of the ways to analyze how to "reset the development" in emerging countries is by improving the image of the government recipients of international aid (for example, the Official Development Assistance - ODA). It can be done by attracting foreign aid by increasing the trust that the government recipient will make well use of the resources invested by directing this to social and economic development projects. Brazil's score in the Corruption Perception Index is 38 (where a country's score is the perceived level of public sector corruption on a scale of 0-100; 0 means highly corrupt, and 100 means very clean), demonstrating high levels of corruption in Brazil's public sector, and showing how possible investors perceive it (Transparency International 2023).

Future research could investigate the impact of other catalytic institutions on the lack of social welfare and economic development in emerging countries. In addition, questions remain open about how problems related to political mismanagement affect other macromarketing issues, such as foreign direct investment and the participation of emerging countries in the international market.

Therefore, following (Benton 2022; Dercon 2022; Mittelstaedt et al. 2014; Mittelstaedt, Kilbourne, and Mittelstaedt 2006; Peterson 2021; Shultz et al. 2012) and, we also argue that catalytic organizations are called upon to elaborate public policies for social and economic development involving a "development bargain" between these institutions. Moreover, Macromarketing research could investigate Latin American governments' role in facilitating market operation through an effective legal system and how this differs among countries (Peterson 2021).

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Globalisation, (Neo)Colonialism, and Marketing Track

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Exploring a Democratized Stakeholder Ethnocratic Framework: Du Bois on Systemic Racism in a History of NFL Scansis Phenomena

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As pro sports play a crucial role in the unprecedented growth of macromarketing systems of the global exchange in entertainment and culture, the NFL is increasingly burdened with the marketing scansis (scandals turned into public relations crises) of systemic racism. As the complexity of these problems exceed the capacity of any single manager to contain it, a democratized stakeholder ethnocratic framework (DSEF) makes a virtue of the plurality of stakeholders' views through different racialized framings of the same polarizing events. As sport manifests the cultures from which it springs, systemic racial injustice is common to both the NFL and its target markets. As athletes of color increasingly utilize social media platforms to advance the cause for great racial equality, we ought to expect sport domestically and globally to continue as an increasingly visible sight for social movements that disrupt unfair exchanges through concerted activist mobilization translated into democratic reform.

Introduction

In contrast to the colorblind norm to macromarketing ethics, it is the objective of this project to formulate an explicitly racialized macromarketing stakeholder theory. Fortunately, on the one hand, we need not reinvent the wheel insofar as the transdisciplinary sociological work of W.E.B. Du Bois on the interface between colonialism, racism, and capitalism can inform our recasting of macromarketing systems. On the other hand, the recent work of Professor Rashedur Chowdhury in a 2021 contribution to *Business Ethics Quarterly* offers us "A New Way of Thinking through W.E.B. Du Bois: The Self-Representation of Marginalized Groups" that amends iconic stakeholder theory by stripping color-blindness of its epistemic white privilege.

Our contribution will be to extend the work of Professor Chowdhury into the domain of macromarketing through the treatment of race, capitalism, and colonialism as overlapping systems that comprise an inherently racialized social contract with all affected stakeholders. As an amendment to Chowdhury's Du Bois-inspired model, we will also draw on the insights of Professor Davis in attempting to extend her case methodology beyond the defunct branding of Aunt Jemima to the contemporary iconographic American brand: the NFL. Moreover, in the spirit of Professor Francis's call to further her decolonial and anti-racist research agenda for macromarketing, we expand Chowdhury's stakeholder theory (mostly focused on the individual) to include what we term an epistemic difference principle in lending epistemological priority at the macro-level to the standpoints of the most marginalized stakeholders.

In cataloging the rise in disproportionately negative public perceptions ties to the growing litany of cases the NFL scansis problems (scandals that turn into public relations crises), lessons can be learned from an extended look at the multi-leveled complexity of case precedent from the NFL (Coombs and Tachkova 2019). The contribution to follow seeks a clearer delineation of public community outreach versus growth in financial revenue. The cause-oriented public outreach

advanced by the NFL's Inspire Change initiative was purportedly designed to advance minority rights to voice, transparency, and effective agency of its majoritarian African American players. However, the overwhelming tendency of NFL public outreach has been to leverage value co-creation disproportionately toward financial growth at the cost of its players as the league is steered by white owners and commissioners to maximize revenue. While the following lessons are drawn from a collation of case study analysis and newsworthy 'scansis' events involved charges of racism over the last two decades of the NFL, we must not lose sight of the cosmopolitan dimensions to cases that have extended to other arenas of international sport. As the NFL continues to seek out market entry (akin to the NBA) in the wider global culture industry, its systemic default 'color-line' undergirding the wicked problem of systemic racism include paid patriotism, inconsistent player discipline, pending lawsuits by coaches for racial discrimination, CTE head injury litigation concerning unequal treatment of White and non-White former players, the sportwashing character of its Imagine Change initiative, and the extra burden placed on its African American labor force through the international market integration of regular season games in London, Mexico City, and Berlin (Coombs and Tachkova 2019). While the Kaepernick protests brought the NFL to the forefront of the BLM movement, the NFL duplicity of its revenue-driven public responses offer systemic cues for raising awareness among other similarly situated minority group stakeholders in the expanding sport culture industry like the NBA, Premier League, FIFA, and mega-sporting events (MSEs) like the Olympics ad World Cup. This NFL case study ought to aid in navigating the situational complexities of new forms of imperial exploit, social media, industrial-military tensions, brand influencer prominence, and labor-managerial stakeholder environments that have become increasingly geo-political in scope (Wang, Reger, and Pfarrer 2021).

What follows first builds upon the transdisciplinary sociological work of W.E.B. Du Bois on the relevant historical ties between race, capitalism, and colonialism that that aid in making sense of how the BLM movement unveiled a global 'color line' that Du Bois had prefigured as the best sociological framing for interpreting all major socio-cultural systems of the 20th century. In bringing together the sociological insights of Du Bois on 'the Veil' with Chowdhury's potential contributions to macromarketing stakeholder theory, his model that privileges the self-representation of marginalized groups in addressing wicked problems that most immediately affect them helps disclose that systemic patterns of racism that run deep in the American experience (Pitz, T. G., S.D. Steiner, and J.R. Pennington 2020; Francis 2021). The North American context of the NFL scansis cases complement Chowdhury's appeal to stakeholder theory in successful social movements against silencing the self-representation of minority groups in the HIV epidemic in South Africa. By placing epistemic priority on the experiences, voices, and testimony of those most marginalized (the epistemic difference principle), we can continue to advance the macromarketing lessons first initiated by Francis's path-breaking 2007 insights concerning the Aunt Jemima brand. In seeking to establish the systemic dimensions of racism to macromarketing, piecing multiple cases into a regularized pattern show the color line of Du Bois having reemerged through macromarketing of sporting systems as perhaps the definitive sociological framing for the 21st century too.

In terms of methodological innovation beyond Du Bois, the unique contribution proposed here seeks advance a democratized stakeholder ethnocratic framework as a novel interpretive framing for these complex racially charged contexts characterized by geopolitically divided stakeholders

(Chowdhury 2021; Francis 2021; Mower, Bustad, and Andrews 2018). On such a framing, we employ the framing of an ethnocracy as a political structure whereby the state is controlled by a dominant ethnic group (White/Caucasian) to further its power, resources, and interests (as in South Africa, the US, and associated European cases). As a classic NFL/US instance of ethnocratic sport governance systems, African American players comprise close to 70% of the NFL but only about 10% of the coaches and none of the owners. As players leverage the collective bargaining power of their players' associations through basic rights to non-discrimination, we expect stadiums and player-influencer platforms to comprise a new public sphere for a global reckoning with the interspersed ethnocratic power structures that are endemic to global capital markets, colonialism, and race.

Macromarketing Methods for Racialized 'Scansis' Problems, Stakeholder Recognition, and the Epistemic Difference Principle to Address Systemic Racism
Our goal is to follow the general methodological spirit of Professor Judy Foster Davis's 2007 *Journal of Macromarketing* article entitled "Aunt Jemima is Alive and Cookin'? An Advertiser's Dilemma of Competing Collective Memories." In this magnificent case study, she outlines the comparative White versus African American consumer perceptions of brand images in the increasingly critical climate around multicultural advertising practices of the 1990s forward. In complementing her historical genealogy of multicultural branding as contained in artefacts as diverse as collectibles, magazine ads, product labels, evolving product imagery, casting of varied traveling trade show influencers, and evolving proprietary imagery, she intersperses the stages of brand evolution with comparative interviews and archives from competing White and African American perspectives. While her focus is limited to the implications for ad strategy in an increasingly multicultural market, perhaps the most important lessons that can be gleaned come from how the essay eventually fit into the wider path dependency of disclosing racial bias in macromarketing systems that fed into the 2020 brand PepsiCo choice to retire the brand image and name in a final concession of its overt and covert racist stereotyping.

Fifteen years later, she authored an ambitious critique of academic marketing as itself riddled by ethnocratic power imbalances. This 2022 piece includes multiple references to the scholarly insights of Du Bois, that frame Professor June Francis's task of "Rescuing Marketing from Its Colonial Roots: A Decolonial Anti-Racist Agenda." In line with the transdisciplinary societal critiques of Du Bois, she emphasizes the direct links of marketing as a discipline to imperialism, colonization, and slavery. Akin to the lifework of Du Bois, she re-historicizes the achievements of European modernity in detailing the role of white epistemic norms that rationalize the foundation of modern marketing structures on Transatlantic supply chains, administrative arrangements for international trade in persons, and domestic print advertising to sell the implicit acceptance of imperialism to a mass consumer base.

In yet another sweeping historical commentary that leads all the way into the present, in a 2021 *Journal of Macromarketing* essay just one year prior, Professor Francis lamented the systemic racism of her own discipline in critique of its characterization of Professor Davis's 2007 Aunt Jemima essay. She makes note of the 'ethnocratic' mismatch between essay content and editorial description in the preface essay of that special edition on marketing history as 'Using collective memory as a theoretical framework and following a nice historical overview of the brand, the study recounts how Quaker Oats and its advertising agencies in the early 1990s wrestled with the

meanings conveyed by this iconic trade character' (137). In her meta-critical analysis of the *Journal of Macromarketing*, Professor Francis asks deeper questions about the integrity of the ethnocratic gatekeeping system within which these potentially transformative research insights were held in check by asking: 'Given that the paper reveals the debasement of African American women and their harmful portrayal, how does the key takeaway valorize the brand as "iconic"? How is the paper's key contribution reduced to the way the Aunt Jemima brand endeared itself to all consumers' (137). Note that a quick search of synonyms for 'iconic' includes but is not limited to words like 'exemplary,' 'archetypical,' 'classical,' 'important,' 'representative,' 'classical,' and 'paradigmatic.' If true, what does this say about her verdict on our marketing paradigms (and macromarketing as standard bearer for AACSB 'societal impact') as nonetheless inherently ethnocratic in racist, colonial, and imperialist dimensions?

In making headway toward a tentative response, if we are nonetheless going to follow the recommendations of Professors Davis and Francis to reconsider 'marketing industry's long history of ignoring the views of its minority consumers' (2007, p. 35) and seek actively to 'radically transform marketing with a decolonial and anti-racist research agenda' (2022, p. 7), we propose experimenting with how Du Bois's epistemology of 'second-sight' facilitates a democratized stakeholder recognition Framework (DSEF) for pro sport neo-colonial collective coopetition (NCCC) with a prolonged looks at the myriad case precedent of racially-charged branding controversies over the last three decades of the NFL.

The development of a democratized stakeholder ethnocratic framework (DSERF) draws upon the sociological heritage of Du Bois that regards capitalist competition colonial in scope as defined by the racial color line. The unique contribution of Du Bois's epistemology to our macromarketing framework is to a) disclose the default cultural epistemic stance of whiteness as the heretofore unquestioned norm and b) adapt the well-known Rawlsian difference principle so that the test for legitimate epistemic disparities in cases of cultural coopetition requires stakeholder explicit consent of marginal groups most immediately affected (Rawls 1971). [See Figure 1: Du Bois on the Ethnocratic Epistemology of the White Gaze]. On Du Bois's view, the unique epistemic solidarity created by the conditions for new racialized networks of cooperation was always already intimately coupled with the attendant vitriol that the *Souls of Black Folk* (1903) perpetually faced in the United States through his famous query: 'how does it feel to be a [wicked] problem' (my bracket emphasis)? Since stakeholders are defined on a democratized principle of all affected, we employ the theoretical framing of Du Bois on the global color line to bring to the forefront the epistemological benefits of ethnocratic diversity for optimizing problem solving efficacy on a model oriented to mutual recognition.

Figure I. The Unchallenged Epistemic Priority of the Colorblind White Perspective

Racism
(Sociology)

Colonialism
(Politics)

Whiteness
(Epistemology)

Capitalism
(Economics)
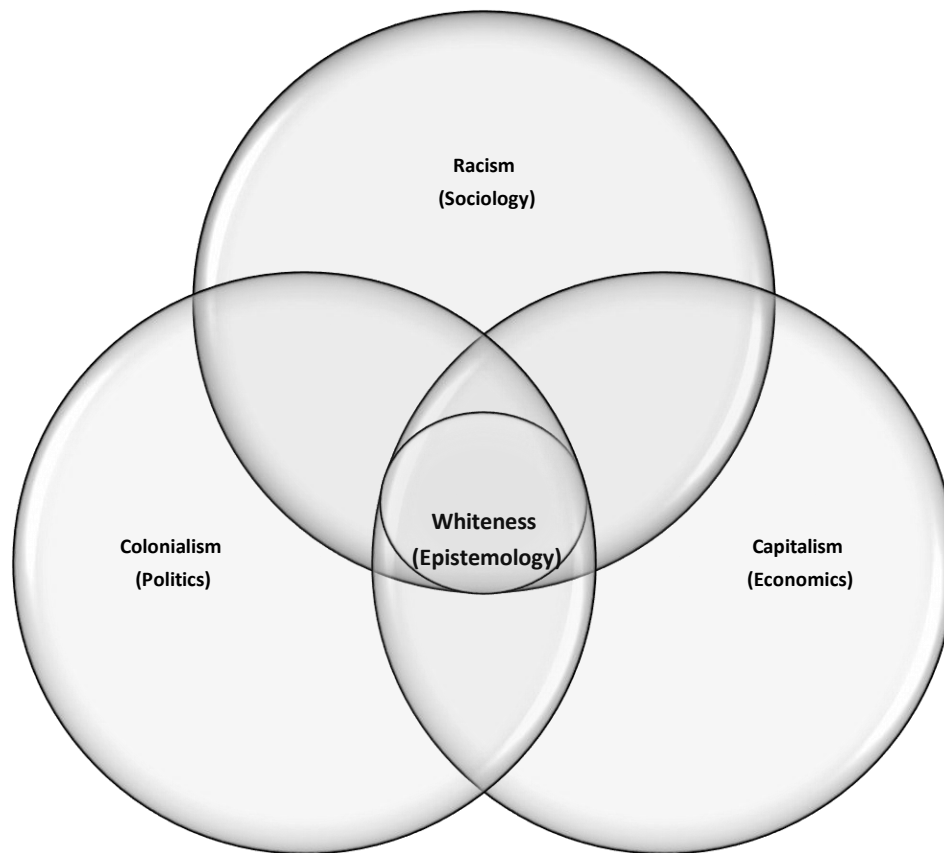
As far as Du Bois goes, with his Harvard doctoral dissertation in history on *The Suppression of the African Slave-trade to the United States of America* (1904), he inaugurated his own variant of a democratized stakeholder ethnocratic framework by retracing the archival transcripts of Congressional Proceedings (Chowdhury 2021). This research called explicit attention to how the nascent American republic repressed and censured media news coverage domestically and abroad of the 1791-1804 successful slave revolt in Haiti. Du Bois read this back into prior historical materialist dialectics the Haitian revolt as an instance of a widescale slave protest that culminated in the first republican democracy to embody the French republican ideals of social freedom, reciprocal recognition, independence, and equality to extend universally, even across the great historical and global dividing line of race. Secondly, Du Bois in his *Black Reconstruction* (1935) contributes to the neo-colonial reckoning of the present in its requisite deliberative democratic and neo-colonial renderings by positing the great 'general strike' as the

definitive moment in US history. Du Bois highlights the social movement driven by 4 million self-emancipated Blacks actively choosing to leave plantations to join Northern forces that had yet to decide on their own abolitionist intents. It would be remiss to withhold such a general strike as a real possibility for sport sporting leagues when crises boil over to the moral outrage associated with scandals, such as the 2015 Missouri NCAA football team refusing to play due to rampant racism on campus. Having engaged in distinctly republican democratic activism that included a yearly counts of American lynchings as editor of the black-run and owned *Crisis*, we find affinity too with his cataloging of these atrocities and the 'say their name' social media attention to police brutality definitive of the BLM activist movement. Thirdly, in a racialized recasting of Hegelian recognition denied, Du Bois attributes the uncanny Black American capacity for 'second sight' in *Souls of Black Folk* (1903) as a prescient iteration of the pragmatic benefits of ethnocratic diversity we will adapt to the Kaepernick narrative. [See Figure 2 below for an illustration of the two distinct vantages on American pro sport culture.]

Figure 2: Du Bois on Sport Behind the Veil of the Color Line

Neo-Colonial Exploit When Ask for Player Testimonial

Anthem Pageantry to Uphold the Myth of Meritocracy

Sport and the Beauty of Its Cultural Melting Pot

Patriotic Sporting Displays as Unifying Land of the Free

Semblance of Competition

Player-Owner Alignment on Market Expansion as Transcultural

Professional Sports Star Influencers

Stategic Geopolitical Abuse of Sport to Hide Liminal Human Right Abuses

Systematic Silencing of Complex Narratives of Dissent

Figure 2

We contend that without due recognition of the Black perspective of 'second-sight' behind the Veil, there is really no means by which the White homogenous standpoint would even think to challenge their own epistemic framing. However, as an epistemic advance captured in our

democratized stakeholder ethnocratic framework (DSEF), the inclusion of Black testimonial experience into our reservoir of racially situated vantages makes it more likely that bias could become disclosed from 'behind the veil.' Part of the assumption would be that latent biases that have become routinized may fare more likely to ensconce bias systemically over time, leading to structural racism. These epistemic insights of Du Bois lead us to the democratized stakeholder ethnocratic framework to depict how sharing common causes (being on the same team, playing for the same country with a colonial heritage, playing in the same transnational league, or even being equally subjected to racist toxicity) can serve as solidarity-inducing mechanisms for coordinated cooperation in an incredibly competitive environment. In the spirit of Du Bois, we thus posit the DSEF as enmeshed sociologically in a situated context of neo-colonial collective coopetition (NCCC). In other words, NCCC, considers the neo-colonial exploits of profit-seeking pro sports firms and leagues perpetually seeking to maximize the scope of their marketing, social media, and influencer efforts to carve out a global market for their fan and consumer base. [See Figure 3 below for the democratized stakeholder ethnocratic framework.] Figure 3: The Democratized Stakeholder Ethnocratic Framework (DSEF)

Figure 3

Despite the intensely competitive luster of the global sport culture industry, players, owners, and leagues are in a constant state of *coopetition* since the absolute market dominance of one or more teams threatens the integrity of pro sport as the definitive product of the global culture industry (Lardo, Trequattrini, Lombardi, and Russo 2016). Insofar as uncertainty of outcome (will my

team, nation, favorite player win?) amplifies the satisfaction induced by the product (the game, the season, the playoffs, etc.), a major tacit component to any successful pro league is the market-mediated cooperative balance required among league members as precondition for maximally exciting competition (thus, coopetition). As a mediating concession to the either/or dyad of mitigating pro sport scansis with an emphasis on maximizing (neo-colonial) market expansion versus normative consistency of communal outreach social movement messaging (NFL—Inspire Change), revisiting the work of Du Bois thus provides insights from a unique vision for workplace internal democratization. His stakeholder model lays out best practices for leveraging administrative monitoring, athlete activism, and fan trust in the integrity of sport behind just more ad hoc oversight investigations like the McCain/Flake 2015 *Tackling Paid Patriotism* 150-page report (akin to the better-know 2007 Mitchell 409-page PED investigation in MLB) towards more democratic and emancipatory aims.

Paid Patriotism (2015), Stakeholder Recognition, and the Epistemic Difference Principle for Addressing NFL Systemic Racism

Nowhere does Du Bois's prognostication of the frequency of scansis phenomena of increasing magnitude and market disruption find a better corporate case study than the last two decades of NFL history (predominantly since 9/11/01). These stakeholder cases range from very public scandals of moral outrage from former players and their families struggling with debilitating CTE head injuries to NFL owners immersed in their own scandals of gender discrimination and abuse, racism, and white-collar crime (Washington Redskins turned Commanders post-Floyd). As a lucrative stream of capital with a single team now selling for billions of dollars, the NFL boasts quite of list of the marquee crises that our proposal offers as a template for plugging into the above DSEF model. For our present purposes, see Appendix A for a timeline of cases that contextualize the independent crises of paid patriotism, Kaepernick kneeling during the anthem, and the signing of Jay-Z and Roc Nation for entertainment and Inspire Change community outreach.

These cases as tied to embodied athletes complement our framing of these scanses traceable back to the neo-colonization of bodies, brains, and more and more market spaces. However, as the marketing to new fans grows, so does an array of cause-related stakeholder undertakings for the performative sake of feigned community outreach. As part of a perpetual climate of scansis public relations strategy containment is a growing assemblage of CSR cause-related efforts that the NFL strategically supports. In employing Du Bois's triangulation of race, capitalism, and colonialism, we can start with its first and second officially sponsored stakeholder causes. The express commitment to Women's Breast Cancer Awareness month through a cooperative alliance with the Komen foundation began during a period in which increasingly public player conduct violations in the mid to late 1990s began to threaten the integrity of the NFL brand image (Smith and Hattery 2020). To cater to a declining female stakeholder viewership and to present the NFL cooperative commitment among owners and players to serve and support their communities through establishing cause-related alliances with a community outreach emphasis that could be showcased as part of the pro sport product. The second formalization of a cause-related alliance came in the domain of the well-documented macromarketing 'wicked problem' of child obesity (Pitz, T. G., S.D. Steiner, and J.R. Pennington 2020). As obesity among children in the US showed a precipitous increase, its disproportionately higher levels among lower-income and minority demographics, led the NFL to devote another month of the league calendar

to promote its efforts to encourage kids to engage in 60 minutes of rigorous activity as day. This includes the tacit added benefit that showcases players teaching kids in low-income and minority urban environments the game of football to ensure a steady flow of future players into its competitive streams of talent.

As the cases of Women's cancer awareness and child obesity emerge as stakeholder strategic causes for league-wide cooperative community outreach, the overlaps between CSR for the sake of the public good and strategic marketing began to morph into mutually reinforcing and increasingly complex ties of interdependence. Nowhere has this become more salient than in the third major cause alliance that now comprises yet another month of the season: the 2011 NFL commitment to a month-long Salute to Service initiative started at the 10-year commemoration of the 9/11 attacks. While the 2011 naming of Salute to Service as a prolonged yearly commitment of donations and ceremony was thereby formally integrated into the player-manager CBA, there is a much longer history of cooperative cause-related integration of recognition of military service as part of NFL and Armed Forces marketing and community outreach efforts. As part of this more extended narrative, we will argue that the Kaepernick anthem protest context that eventually led to the fourth major stakeholder CSR cause alliance—the Inspire Change initiative—cannot be fully understood without a deeper dive into the origins of Salute to Service and the related crisis of *Paid Patriotism* (2015). [See the Table 1 below for an overview of the major causes, associated influencer efforts, ties to NFL market expansion, and associated potentials for scansis.]

Table I. Epistemological Stances, CSR Causes, and Scansis Instances of Systemic Racism

Stakeholder Names and Roles	Basic Consumer Right(s)	Corresponding NFL CSR Cause	Epistemological Stance	Scansis in Public Relations Outreach
Kaepernick as Former Player and Social Activism	Voice—Be Heard	Anthem Kneeling/Salute to Service	Second-sight as an African American elite quarterback raised by adoptive White parents	NFL owners admit guilt in collusion in violation of the player CBA
Flores as Current Coach and Advocate for Greater Managerial Representation from African Americans	Voice--Representation	Inspire Change	Second-Sight as an outstanding coach held to double-standards by White owners	Flores was fired for rejecting his owner's plea to lose games on purpose and recruit illegally
Tillman as a White Former Player Co-	Information—Fair and Accurate	Salute to Service	Critic of Iraq invasion gaslighted by military, media, and the NFL in	Tillman's death was lied about for NFL and US military gain

Opted into a False Narrative			order to be recast as a patriotic hero	
McCain/Flake as Senators and Advocates for Responsible Stewardship of Taxpayer Monies	Info--Transparency	Paid Patriotism	White Senators accidentally coming across the scandal of paid patriotism in conservative efforts to render government spending more accountable and transparent to taxpayers	Funding for Iraq exceeded the ability of the government to pay while the DoD was paying millions to pro teams for anthem pageantry
Jay-Z as Billionaire Performer, Part Team Owner, and Cultural Icon	Choice	Inspire Change	Regards entrepreneurial success and conspicuous consumption as warrant for mass public recognition	Kaepernick tweeted that Jay-Z was co-conspirator with the NFL ethnocratic governance
McMahon, Seau, Lewis, and Owens as Former Players and Family Advocates of Former Players Suffering from CTE	Safety	Player Safety/CTE	Skeptical critics of the pattern of settlements not going out to former Black players (the majority) that viewed the scandal as part of a wider repeated systemic failure of the NFL to consider minority perspectives on par with an implied standard of White privilege	The NFL players will become even more majority Black as White youth are not playing for head safety reasons

Tillman, Salute to Service, and Fair Release of Information (2004)
The century-long history gestured at above can only be presented in truncated form. However, perhaps no better case encapsulates the first deeply public exposure of the NFL to the moral outrage characteristic of scandal than Pat Tillman's enlistment in the military to participate in avenging the 9/11/01 terror attacks. The NFL and military marketing/community outreach efforts produced this telling instance of neo-colonial collective coopetition (NCCC) as a framing mechanism for the many-sided 'scansis' narrative of the Pat Tillman story that continues to

resonate and evolve to this day. Upon enlisting in the Armed Forces, Tillman's aim of serving in Afghanistan conflicted with the military's strategic use of his influencer publicity to bolster popular support for an increasingly unpopular assault on Iraq.

Tillman was very public questioning the legitimacy of the Iraq front on the war on terror, explicitly regarding it as a neo-colonial front for accessing valuable Iraqi oil and setting up a larger military presence in this oil-rich geopolitical terrain. Contrary to his wishes, he was nonetheless coaxed into service there on a tour that was documented by repeated dissent and crisis-inducing statements that continue to challenge the credence of the military information and intelligence hinting at Iraqi weapons of mass destruction. The ensuing negative publicity bordered on scansis for both the NFL and Department of Defense (DoD) brands as Tillman called into question the marketed exaltation of his heroic stature at odds with the military neo-colonial marketing objectives of rallying support for the Iraq invasion. This represents the classic differentiation of crisis from scandal, as the latter must be fueled by greed rendered openly public as the military used terror as the proxy for expanding its presence in the deeply competitive domain of oil, gas, and energy markets.

In a tumultuous set of events, Tillman died on tour. What stoked even more moral outrage and anger was that the NFL and US military were found complicit in conducting a false narrative (for marketing purposes) of Tillman dying in battle in leading a courageous counter assault against attacking Iraqi terrorists. However, as Tillman's own family pieced together gaping holes in the narrative over years of fact-finding legal battles, they were eventually able to get the US military and NFL to concede mutual complicity in concocting a false narrative to replace the more tragic tale that Tillman was killed by friendly fire under circumstances that today border on a liminal plane between somewhere between freak accident to frustrated fellow servicemen or superiors silencing a dissenter.

McCain and Flake, Paid Patriotism, and Information Transparency (2015)
What began as a fact-finding mission into pork-barrel politics evolved into an indictment of the NFL, the US Military, and all other major American pro sports for engaging in deceptive advertising. As a war veteran and staunch public supporter of the Iraq invasion, McCain began with conservative gestures of outing irresponsible waste of taxpayer money and connected it to taxpayer calls for increasingly accountability of the Department of Defense asking for $100M in additional funding for its ongoing and increasingly unpopular engagement in Iraq. McCain's role as a Washington insider also saw much of the military-industrial millions in funding included public displays of patriotic pageantry at numerous professional and college sporting events. In this manner, McCain and Flake deemed the 'paid patriotism' crisis as a violation of basic taxpayer and consumer/fan rights against fraudulent deception. For further clarification of the various nuances through a visual outlay of the intricate contextual factors, see Appendix B. Insofar as the deep causal ties between every major American pro sport league marketing departments and community outreach are laid bare in the 150-page *Tackling Paid Patriotism* report (McCain and Flake 2015), the copious documentation offered for public critical inquiry evinces clear examples of the imperialist ambitions behind the strategic use of sport more than a decade prior to Kaepernick's first anthem kneeling.

As a documented outcome of the *Tackling Paid Patriotism publication,* public statements from the federal level of the Department of Defense called for a permanent line of demarcation between marketing initiatives through paid advertising for recruitment versus community outreach for honoring members of the Armed Services (see Appendix B for reference again). Similar memos were circulated by Commissioner Goodell to all team owners. When the anthem display and color guard were to use National Guard members in the ritual process, the National Guard lamented that miscommunications occurred between Federal National Guard and State National Guard arrangements that offered a highly flexible array of state to team informal and formal stakeholder dealings. Going forward, Department of Defense Federal authorities require any state national guard to document and report arrangements for the color guard and anthem prior to appearing at league games. The DoD and NFL expressed documented alliance that color guard and anthem arrangements ought never to be compensated to honor troops in sincerity. As such, any case of compulsory participation in the anthem ritual for pay, ought to be viewed as an illicit exercise of NFL/military resources for the sake of a duplicitous aim.

Kaepernick, the Anthem Kneeling Protests, and Voice (2016)
To hold that Kaepernick and other recently kneeling athletes unnecessarily brought the messy nuances of geopolitics into sport is contrary to the history of the US anthem ritual association with pro sport. For instance, while an array of competing songs was employed to rally patriotic sentiment up to the context of WWI, it was the 1918 World Series between the Chicago Cubs and Boston Red Sox that found sport building upon Woodrow Wilson's 1916 order to play the anthem at military and naval occasions by playing the anthem during the 7th inning stretch. This followed the 1917 entry into the war and reverse Wilson's initial stance of neutrality. This initiation of the anthem into major sporting events was to honor Cubs' Hall of Fame pitcher Grover Alexander who had missed most of the season in France serving in the war efforts. As a telling instance of what crisis-oriented management scholars call sense-making by retrospection, it was sport that legitimized the patriotic act as an appendage of the culture industry. While the narrative does offer a century of cultural precedent for those that hold dear to retaining this heritage, it nonetheless shows as a telling instance that even routines of high symbolic importance often have contingent origins that easily could have played out differently.

Adding to the tacit, routinized, often unnoticed, sub-narratives of neo-colonial collective coopetition (NCCC) as applied to the nuances of NFL scansis (failed) mitigation, comes an ethnocratic tie between the underlying demographic profiles to the major stakeholder parties to any CBA agreement. These are brokered at the NFL level between Commissioner, owners, and players (that incidentally does not include any reference to compulsory anthem participation). At this point in time, the approximately 1700 NFL players are about 70% African American while there have never been any African American owners or Commissioners. In the context of surveying fan responses to 'paid patriotism' in 2015, just prior to the Kaepernick moment, Sorek and White found that NFL fandom intensity was on the increase equally for African American and White fan bases during the span of the paid patriotism period (2006-2015). While the authors tested the hypothesis that with increased indices of fandom emotional investment in team-identification as a source of belonging, for those surveyed within the context of nearly a decade of paid patriotism pageantry as subtle indoctrination, one might expect African American fans and White fans to show parallel increases in patriotic sentiments commensurate with increasingly positive team-fandom sentiments. As a telling instance of the potential experimental and

epistemic benefits of our DSEF for the NFL, when tested empirically upon racially disaggregated consumer/fan test groups, this was clearly not the case (Johnson 2017). Although aggregate patriotic sentiments of White NFL fans increased over the paid patriotism period, the African American fan-base (extrapolated by Sorek and White to players too in the immediate context leading up to the Kaepernick moment) showed decreases year by year in patriotic sentimentality. The authors attribute these differences to the competitive meritocracy of all pro sports as perceived by the NFL's White fan base as directly reflective of a racially colorblind epistemological framing of patriotic displays. White fans surveyed continually appealed to the assumption that the meritocratic achievements of pro athletes can become emulated at all other levels of the American competitive landscapes for careers, political positions, and upward societal mobility (Rhoden 2006). In contrast, African American fans surveyed expressed a disjunct between African American player achievement as a unique public expression of Black excellence. However, such rare case of excellence were outliers to fans' lived experience as African American. As such, the decade-plus of paid patriotism as a paradigmatic instance of the internal complexity of NCCC, led to a marked decline in African American patriotic sentiment (Bryant 2018). In the concluding remarks to the study of Sorek and White, they presciently observed these competing racial attitudes toward paid patriotism as a telling cue (in 2015) to the Kaepernick moment about to unfold months later. The authors noted that stakeholder dissent to the dominant framing of patriotic displays in sport as contributing to national unity were likely to emerge from Black players making explicit what Black fandom already gave empirical support:

> And yet, visible black protest in the football stadium is a rare phenomenon. Sporadic cases of protest by athletes (such as the 'don't shoot me' gesture of five NFL players in November 2014), are rightfully considered as rare exceptions to the rule. We suggest, however, that the scarcity of explicit political statements by the players does not tell us how the fans experience the field. Even without talking, by only providing a model of black prowess the black players may create the conditions for questioning the national ideology (Sorek and White 2015)

As a fitting illustration of the cultural conditions for NCCC as crisis turned scandal (thus scansis), the efforts at patriotic pageantry as mechanisms of inculturation toward unity are often complicated by community outreach causes that do not adequately weigh minority epistemic stances through colorblind bias of whiteness as the only hermeneutic. Such public relations disasters devolve into a scansis when marketing and public relations place competing market segments and fan bases at polarizing odds with one another to the point that athletes at the margins feel compelled to protest. Such minority sport influencer activism proves most salient at the convergence of Du Bois's transdisciplinary insights on the sociological import of viewing race, capitalism, and colonialism as mutually reinforcing strands of an unsustainable system of ethnocratic governance by silence.

Flores, the Representation Deficit, and the Refusal to Tank or Tamper (2019)
While Du Bois's remedy to seeing 'behind the Veil' and across the world-historical color line requires ethnocratic communicative channels in circumstances of crisis and scandal, the representative bridge to the 'cratic' (Greek *krasia*: to govern, to rule) in ethnocratic lacks the 'ethno' (Greek *ethnos*: people, nation, class, tribe, caste) in the case of NFL Black leadership. With 70% of players Black, there are 3 Black coaches (10%), VPs are at 7%, GMs are at 6%,

and owners (0%). Insofar as sharing a common 'ethnos' is a strong prerequisite for mutual recognition and mutual understanding, the gift of 'second sight' that comes from inhabiting a Black body behind the Veil ought to serve as a compelling rationale for hiring more Black coaches, general managers, etc. This stakeholder governance weighting of minority as majority will only amplify with compelling empirical projections of an increasingly disproportionate Black player profile to the league as non-Black youth participation declines.

As one avenue of bridging these ethnocratic gaps in governance, when the Miami Dolphins hired Brian Flores in 2019, he had been an assistant coach for the dynastic Patriots from 2008-2018. Although he eventually led them to their first two consecutive winning seasons in 2020 and 2021 since 2003, nonetheless he was fired at the close of the 2021 season. Per his account, he was fired by Dolphin's owner Stephen Ross for refusing to lose games intentionally for higher draft picks at the request of his owner. Despite a winning record over 3 years and a playoff appearance, he was also fired for refusing to tamper with the CBA rules on soliciting players under current contract (namely, pressure from his owner to tamper with the restricted agency of Tom Brady prior to his 2021 impending free agency). For reasons of conscience that he surmised would undermine his ability ever to aspire to be a head coach again, he filed a 2022 class-action lawsuit against the New York Giants, Denver Broncos, and Miami Dolphins organizations for alleged racial discrimination, joined in the pending lawsuit by former Arizona Cardinals head coach Steve Wilks and long-time assistant coach Ray Horton.

Jay-Z's Roc Nation, Consumer Choice, and the Inspire Change Campaign (2019)
As another instance of collective coopetition, upon enlisting Jay-Z and Roc Nation as a joint partner in both marketing (A-list Super Bowl entertainment) and community outreach (through helping steward the funds and initiatives of the Inspire Change cause), the NFL introduced the idea of playing both the traditional anthem and a Black anthem. Given Sorek and White's findings on the inverse relationship between African American fandom and patriotic sentiments (2016), the incorporation of the Black anthem 'Lift Every Voice and Sing' is a path-setting precedent for NCCC (Dyson 2019a; Dyson 2019b). The marketing concession that two distinct cultural grouping within the target audience of the United States might perceive the anthem in very different manners, incorporates the marketing logic of coopetition into sporting ritual displays as the same game. Teams will compete under the same league rules while it is left to consumer choice how to consume and perceive the respective duality of anthem performances perceived very differently in the collective memories of African American versus White consumers (Northcutt, Henderson, and Chicoski 2020; Oates 2020).

Although the NFL partnership with Jay-Z and Roc Nation made some unprecedented changes in the domain of ethnocratic coopetition, as for some of the other key stakeholders outside owners and major corporate partnerships, the reactions were mixed. On the one hand, many fans, players, and black leaders celebrated Jay-Z's success on the Black liberal model of strategizing one's way to the elite of elite in American business in striking a deal between Roc Nation and the 32 NFL owners.

On the other hand, many saw this as an unwelcome fissure in Black leadership, with Black pundits, entertainers, and athletes labeling Jay-Z a traitor of sorts (pointing to the seeming conundrum that Jay-Z previously sported a Kaepernick jersey during a 2017 SNL performance

and publicly voiced support on multiple other occasions). Critics also wondered: would Jay-Z's own pursuit of blazing new ground for Blacks to pursue financial interests on their own terms amount to a hindrance to the progress Kaepernick had made in drawing attention to the symbiotic relationship between American capitalism, democratic dysfunction, and systemic racism?

From the counter narrative of leveraging the prevalent disruptive intensity of the emergent social movement (Butterworth 2020), it took Kaepernick a week to respond to the NFL announcement (8/18/19). Kaepernick first tweeted a picture of solidarity and a message of care and support for his brothers still kneeling during August 2019 preseason games even in the face enduring repeated death threats. However, even more significantly, the second tweet was lost in the hyped mix of consumer reactions to the Roc Nation announcement. In his second deeply reflective tweet he radically disrupts the linear narrative of progress presumed in the American ethos of moving forward to a better tomorrow (Daum 2019). He initiates a direct call to redeem a lost intellectual Black sporting heritage that posits reflective Black minds and the solidarity of a shared fate over Black body productive entertainment (Bryant 2018). On 8/30/2019 Kaepernick posted a Twitter shot of a highlighted paragraph from R. L. Allen's disruptively titles *Black Awakening in Capitalist America* (1969) with the short comment 'Reading always gives me clarity.' While overlooked as of little consequence, it strategically forced Jay-Z and any cultural participant to reckon with an internally diverse, non-linear (Comaroff and Comaroff 2012), heritage of Black nationalists of varying degrees of social and democratic resistance to White neo-liberal capitalism (186-187). In the larger context of the manuscript and its themes, Allen pays continual tribute to Washington, Du Bois, Garvey, and other seminal Black intellectuals in noting their respective roles in contributing to stages, nuances, and ethnocratic variations on Black nationalism. As a teaser, Kaepernick even offered incentive for any stakeholder to crack the book by drawing explicit attention to Allen's thematic line 'What [they] seek is not an end to oppression, but the transfer of the oppressive apparatus into their own hands.'

As a further layer of multifaceted temporal context, Allen's quoted remarks are a Civil Rights era radical critique of the methods and motives of CORE (the Congress on Racial Equality), as it was founded in 1942 at the University of Chicago on a platform of pacifist racial reconciliation. That pacifist platform made it a social movement that eventually matured into a key player in the 1960s Civil Rights movements, forming strategic corporate alliances among major urban industries (like Ford) on the hopes that CORE might be able to silence a growing number of urban social movements, including many voiced out of direct concern for excessive police use of force in attempts to break up public protests. What Kaepernick found as a timely critique already advanced almost 50 years prior saw Black intellectual nationalists warning those persons of color most affected against the same strategic deployment of the unhealthy narrative of progress by reform.

As such, Kaepernick's main motive in highlighting the part of the tweeted passage below is to recast Jay-Z, Roc Nation, and the nascent NFL Inspire Change initiatives as the 2019 equivalent to CORE's complicity with a systemically racist order that places corporate gains over the care and well-being of those comprising its major source of labortainment. Rather than the Ford Foundation in the 1970s strategically utilizing its corporate resources and influence to maintain

the status quo, this time it is the corporate might of the 32 NFL owners to play to corporate role of pacifying peace-enforcers.

> In summary, CORE and the cultural nationalists draped themselves in the mantle of nationalism, but upon examination it is seen that their programs, far from aiding in the achievement of black liberation and freedom from exploitation, would instead weld the black communities more firmly into the structure of American corporate capitalism. (Robert L. Allen 1969)

Since Kaepernick tweeted the above textual quotation on August 20, 2019, his posting of it exactly one week after Jay-Z's Roc Nation NFL deal signed 8/13/20 renders his disruptive intent quite clear. Substitute Jay-Z's 2019 Roc Nation partnership with the NFL for entertainment and social justice initiatives as the corollary to CORE. Kaepernick believes that the capitalist motives driving Jay-Z's complicity with the White colorblindness of the NFL, its owners, and the newest wave of the pacifying American culture industry, will call it progress by simply inserting piecemeal reforms like the new ritual of including the Black anthem, the sale of themed racially conscious jerseys and apparel, and providing the most relevant and lucrative Super Bowl entertainment from entertainers of color (to continue to support White owner interests and revenue). Kaepernick was explicitly calling out Jay-Z out for not just working alongside the NFL owners as oppressors, but in collaborating with the profiteering on Black labor. On Kaepernick's view, Jay-Z had come the closest to complicity in the hierarchical domination one could get without being a co-owner. However, perhaps worse, was that Kaepernick questioned whether better and more engaging entertainment would ultimately help those born Black and poor, most often facing premature death at the hands of White law enforcement in moments of greatest vulnerability (Varman and Vijay 2018), with military service openly marketed to them (through the allure of professional sport) as their best hope in a trade of their bodies for an exit to systemic poverty.

Lewis on Player Head Safety Advocacy, Pending CTE Lawsuits, and Race-Norming (2022)
It is the volume, velocity, and variety of social media responses that the Kaepernick images of kneeling evoked that evinced the power of real time visual imagery as a newly interactive model of public social media engagement with NCCC events in real time (Dickerson and Hodler 2021). Key to this new component would be the unprecedented candor of President Trump as Commander in Chief from elected office to express such animosity directed toward Kaepernick as a player to fire and the NFL as an institution for permitting such protests to occur in their organization. President Trump even waded into the complexities of McMahon/Seau 2013 $675M concussions and player safety lawsuit paid out to former players with one tweet lamenting how the game (with rule changes to protect players) had become 'soft' as among contributing factors to its declines in viewership. Incidentally, the social media attention Kaepernick brought to systemic racism led to the 2022 Owens and Lewis successful lawsuit against the NFL's concussion pay-outs that had rejected a disproportionate number of Black former player claims by 'race-norming' them to have presumably started at a lower cognitive threshold by being Black and thus did not satisfy the degree of cognitive decline requisite for compensation. This recent court victory allowed more than 4,000 Black former NFL players to refile for reassessment under criteria not maladjusted to race-norming.

From a labor-managerial perspective, the stakeholder recognition of minority voices required concerted activism on the part of players affected, to rectify reparations to injured players that offers yet enough instance of separate and unequal brand representation. However, in a shift in stakeholder epistemic weight, in contrast to African Americans making up a minority of the Aunt Jemima brand consumer base in the opening Aunt Jemima case study, the brand valuation of the NFL resides in the extraordinary contributions of its African American players that contribute the vast majority of NFLPA members. This market supply of African American labor is only on the increase, as the 2013 Dorsett, McMahon, and Seau efforts in calling attention to football head injuries has reduced the overall supply of youth playing football as parents begin to steer children to other sports (see Appendix B again). However, while White youth football participation has declined each year in the past decade, African American youth participation has shown no measurable decline. As management prepares for a future that likely will see an even greater proportion of Black players, the dual anthem incorporation sets a new benchmark for planning for NCCC and restoring any prior breaches of trust between players and placating the moral outrage of both extremes of affected fans (Gillespie and Siebert 2018).

Concluding Areas for Future Research, Limits, and Potentials for Industry Application(s): How the DSEF Model Applies to Past, Current, and Future Marketing Scansis Cases
As a potential limitation to the study, we concede that the US phenomena of militaristic displays at sport is quite outside the global norm. This could affect the application of the DSEF model globally while it also might aid in the interpretation in international sport as nationalist populism is on the rise globally. In addition, the longlist of weaknesses the NFL's history of crisis management might seem to offer few strengths upon which other pro leagues might build. However, on the one hand, many of the problems with the NFL's underperformance on racial and sexual discrimination are suggestive of patterns in other global sporting regimes. On the other hand, the scholarly precedence for assessing resilient performance across all industries sets its stringent thresholds out of 'brutal audits' whereby classical case(s) of failure benchmarked against highly reliable organizations sometimes make for the best instruction by highlighting incremental and structural fissures in crisis preparedness (Weick and Sutcliffe 2007). While failures in pro sport organizational reliability and resilience are abundant, set benchmarking standards high with basic human rights protections is a start. However, the setting thresholds for near-perfect resilience that are a better organizational fit for sport than nuclear facilities and emergency medical room care would require further research.

As another potential domain of research beyond the scope of this project, worthwhile consideration ought to go into the stadium (globally) as something akin to the new public sphere. If there is any credence to such a conjecture, more research into the presumed equilibrium to the co-creation of value through pairing marketing with community outreach seems even more salient. Insofar as stadiums go unused more than not, they also ought to be considered as sites of public service, as witnessed during COVID, natural disasters, new urban voting initiatives, and even sites of social movement protest for the shock value of entertainment/consumption/escape versus a new domain for attention grabbing for causes and initiatives that others may not otherwise be aware of without that new public square.

On the heals of the most recent October 2022 disclosure of systemic sexual and emotional abuse faced by players at the hands of male coaches and managers in the National Women's Soccer

League, these perpetual scansis issues are not unique to the United States and the distinctively American pro sports culture industry. A similar European dynamic emerged as Premier League fans called for a change in Chelsea ownership as sanctions against Russian oligarchs brought to fore the tension between the marketing advantages of wealthy international club owners that can offer mega-contracts to elite players without subjecting owners to due diligence as the origins of the billions. Even in the Premier League where new record elite player contract signings set global records each year, these financial advantages of limitlessly deep pockets were judged secondary to the communal cause of presenting European wide solidarity against the aggressive acts of Russia. As Western sanctions of Russian oligarchs targeted Putin's 'inner circle,' Roman Abramovich known as 'the original Russian oligarch,' ceded to public pressure and just completed the sale of his majority ownership in the club in May 2022. Moving into this more global dispersal of stakeholders as geopolitical crises become increasingly complex, the world just celebrated the completion of the November 2022 World Cup in Qatar. This unique venue of an oil-rich Middle Eastern country was chosen strategically to expand FIFA's marketing efforts to an area of the globe that has never hosted a World Cup. However, akin to the citizen critique of the costs of 2014 World Cup stadium construction costs in Brazil (with one venue charged with environmental protest mobilization as it required infrastructure deep into the rainforest on indigenous lands) and the 2018 World Cup critiques of host Russia's aggression against Crimea and abuse of LGBT rights (Rosenthal and Cardosa 2015), Qatar was from start to finish riddled in public relations scandal. The list includes but is not limited to human rights violations of Nepalese migrant workers doing the construction (with modest estimations of deaths of migrant workers at more than 6,000), moving the normal World Cup calendar from the summer months of June and July to November attempt player safety in the unique heat of a desert climate, and documented evidence of bribery in securing the hosting selection for a team that ranked 133rd in the world. As these sorts of scansis cases are likely to continue to grow in prominence, more macromarketing research needs to be done into how democracy, basic rights, and racial recognition can redirect the moral outrage of this new typology of 'wicked problem' as scansis continues to check the limits of corporate greed.

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Appendix A

Timeline

DATE	10/30/01	11/4/15	8/14/16	9/1/16	1/1/17	10/1/17	9/3/18	8/17/19	8/30/19	10/6/20
EVENT	President Bush throws out the first pitch in Game 3 of the World Series in New York	Senators McCain and Flake (both AZ-GOP) release slam Pentagon in reportedly spending $6.8 million to the NFL and other sports for 'paid patriotism'	Kaepernick goes unnoticed in his first anthem protest sitting on a bench (injured, not in jersey) rather than standing in the first preseason that season	Kaepernick kneels along with teammate Eric Reid in their last preseason game at San Diego; other players begin protesting 9/11/16 kneeling or raising a fist	Kaepernick plays his last game as an NFL player in a loss to Seattle	Jay-Z wears a custom Kaepernick jersey in his appearance on Saturday Night Live in support of the cause against police brutality	On Labor Day, Nike launches its marketing campaign with Kaepernick as the new face the 'Just Do It' motto and its multi-million–dollar sets of product and ad endorsement deals	NFL announces partnership with Jay-Z's Roc Nation to focus on entertainment and social justice initiatives and for an implicit initial spot for Jay-Z as first black owner	In response to Jay-Z's alliance with the NFL, Kaepernick cites Allen's *Black Awakening in Capitalist America* (1969) and the specific reference to CORE	Kaepernick publishes his 'The Demand for Abolition' as part of a 30-essay series over 4 weeks titled Abolition for the People in partner with Medium
CULTURAL MEANING	This was a symbol of courage and national pride post-9/11 after a day of visiting the World Trade center site	What had been seen since 9/11 as rituals of US sports teams honoring servicepersons were actually paid spots for military recruitment; in this way, Colin Kapernick was not the first to politicize sport	Kaepernick continued to sit the next week and the following week 8/26 for the first time in a jersey and explained he would not stand for the flag a month after police shot Alton Sterling in Louisiana	Kaepernick went from sitting to kneeling after a discussion with former Green Beret Nate Boyer who disagreed with Kaepernick but had the idea of kneeling as a common military gesture in front of a fallen brother's grave	He opted out of his last year of his contract with the 49ers that summer but was not signed by any teams in the off-season	Jay-Z had also dedicated a song to Kaepernick at a live show earlier that Fall and turned down the NFL offer to perform at halftime of Super Bowl LII 2/4/18 which led to the 2/3/19 SB LII boycott of most performers	The campaign states: 'Believe in Something. Even if it means sacrificing everything.' The move enhanced its sales with the urban Millennials target market and was heralded as a new level in marketing politicized	Jay-Z claims that 'we are beyond kneeling' with the notion that it is time to move forward and getting a seat at the table on the social initiatives and partial co-ownership is another step in the right direction	Kaepernick suggests that complacency and black middle and upper-class alliance with the white status quo is tantamount to becoming a co-conspirator in the oppression of the most impoverished of persons of color	Kaepernick revises his initial views on better training and critique of police pay for brutality and takes the stance that the policing and incarceration of blacks in America is an extension of slavery and must be abolished

Appendix B
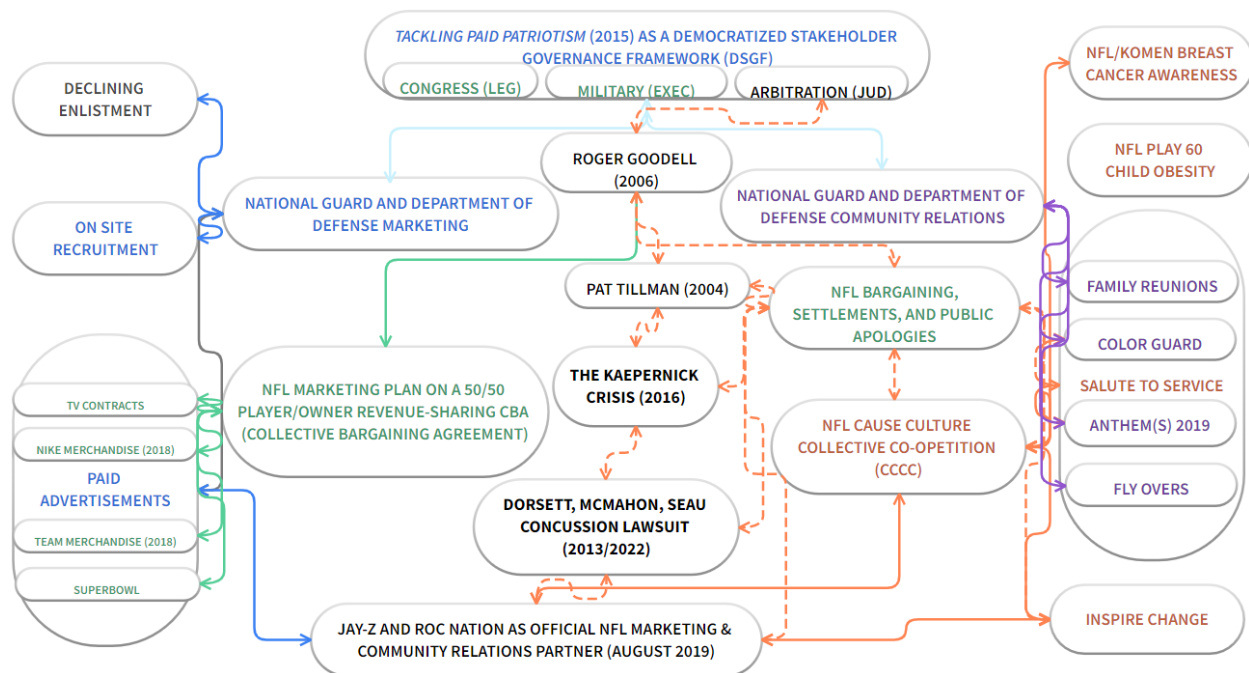
Learning to Tarry in Decolonising Marketing Education

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What would it look and feel like to deliver marketing education that is decolonised both in terms of content and approach? This article explores an approach to engaging students with the concept of decolonisation as part of a module on responsible marketing and society at a University in the United Kingdom. The module addresses the relationships between marketing, society and morality and endeavours to encourage and offer opportunities for student to recognise and explore their own position in terms of responsible marketing practices. The activity discussed here involves a workshop developed in partnership with the Barber Institute of Fine Art, an art institution which sits on the University Campus, but which is funded and run by the Barber Foundation, with a legacy bequeathed by the Barber family.

The gallery houses a world class collection and working together with the Director of External engagement and a freelance art curator and educator, we selected pieces from the Barber's collection through which to explore issues around decolonisation, critical thinking, morality and our individual identities.

As sites of knowledge (re)production, Western Universities serve to perpetuate ideologies and practices entwined with colonial histories, this is particularly an issue for Business School's given that colonialism is integral to capitalism (Eckhardt et al. 2021). Although lagging behind other disciplines, business schools have started to address the legacy of colonisation, for example the renaming of Bayes Business School (formerly CASS) in London and work undertaken by their Centre for Responsible Business ETHOS (Banerjee, Rodriguez and Dar 2020).

Racism and discriminatory practices have been identified in marketing activity (Foster Davis 2018, RIM) and examples have been put forward as to how this might be addressed in pedagogy, for example through a focus on critical reflexivity when teaching advertising (Thomas and Jones 2019). However, given that decolonisation requires a recognition that there are multiple ways of knowing and doing and to disrupt the status quo (Eckhardt et al. 2021) decolonisation in marketing remains 'in a nascent state, with so much important research to be done' (Eckhardt et al. 2021).

This paper reports on a project which attempts to the disrupt this status quo through introducing the topic of decolonisation into the marketing classroom. Contentious, difficult and emotionally charged topics are not unknown within a business school environment. For example, Tallberg et al (2022) discuss tackling animal ethics within the food system, calling for 'fierce compassion' from both students and staff as important when tackling uncomfortable realities.

Drawing on inspiration from the writings of George Yancy, we make the case for finding the space and time within the marketing curriculum for students and staff to slow down, what Yancy (2005: 26) refers to as 'tarrying together'. His calls are directed at white people, urging them to take time to dwell with the emotional and cognitive difficulties 'as they become more and more attentive to the ways in which they are entangled in the social and physic web of white racism'

(Yancy 2005:26). We argue that the art gallery along with the ethos of 'slow learning' advocated by arts educators provide an ideal mix for tarrying. The approach of looking very slowly in order to engage with an object or artefact provides the opening to hear our own experience as well as those of others. An opportunity to engage with what Swan (2017) refers to as 'fearless listening', an engagement in which we supress the urge to take action to address the perceived injustice, which may inadvertently make things worse, and instead create opportunities to listen to, and hopefully hear and the connect with 'other'. Such opportunities may require bravery and care on the part of the educator, but if we can find the time and space to tarry, we can create opportunities for 'generous encounters' (Ahmed 2002) with the other and gain new insights into what decentring Eurocentrism might mean for marketing education.

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A Transmodern Perspective of Brazilian Consumerism: The Case of Women From Salgueiro

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During the 1970s, in the United States (US), marketing scholars began focusing on consumerism, given the rise of such phenomenon in US society, as a result of social, political and economic turmoil at the time (Becker 1972; Day and Aaker 1970; Kotler 1972). These academics were committed to presenting definitions, causes, and forecasts related to the consumerist movement, in an attempt to better understand and bring marketing closer to it. Nevertheless, these debates scarcely embraced discussions on the geopolitical context surrounding consumerism, ignoring, particularly, the important role of the black consumer movements, particularly those practiced by black women, both in the US and abroad.

More recently, in the early 2000s, a "newer" version of this consumerist movement, known as the New Global Consumerism (NGC), surfaced, originated in an ambivalent postmodern turn that neglects the subordination of consumers to a major capitalist system (Micheletti, Follesdal, and Stolle 2006). NGC enabled the appropriation of alternatives that arose outside of modernist capitalism to control transmodern theories and practices, but maintained capitalist globalization ideology. This renewed rhetoric of racialist liberal capitalism therefore still refuses to recognize everyday consumerism and histories-others constructed by transmodern praxis (Faria and Hemais 2021).

Based on a decolonial perspective from Latin America, scholars from the Global South reflect on the fact that the consumerism agenda overlooks histories of the majority oppressed by gender, race, and colonialist issues (Faria and Hemais 2021). Such discussions are underpinned by a transmodernity concept and praxis (Dussel 2002), which emerges as a life-preserving approach developed by the majority excluded by globalization (Dussel 2006). Transmodernity embodies the preservation of heterogeneous oppressed existences in the world by acknowledging its pluriversalist coexistence. Therefore, by adopting a transmodern perspective towards official histories in consumerism, it is possible to challenge their supposed universalist status (Hemais and Santos 2021).

Everyday re-existence praxis made by those who engage in an integrative society was silenced by the official history of consumerism, as a way to "protect" the centers of knowledge production from transmodern ideals and praxis (Faria and Hemais 2021). Consequently, this official discourse is dubious, given how its arguments are based on the denial and censoring of topics concerning race, class, gender, and sexuality that criticize traditional consumerism concepts, and aimed at symbolically annihilating such criticism from consumerist discussions (Davis 2018). So, the normalized consumerism supported by scholars in management, in general, and marketing, in particular, is a whiteness consumerism, which supposedly aims to provide individual rights to non-racialized people, but in truth only exploits and continues to marginalize them (Rodrigues, Hemais, and Costa 2022). Movements assembled by black peoples – such as the Black Campus Movement in the 1960s-1970s in the US, for instance – were dismantled or

misrepresented by these academic discourses. Hence, this invalidation and judgment of values based on neoliberal capitalist perspectives, which contributed to canonizing a partial, incomplete, and allegedly universal consumerism (Faria and Hemais 2021).

Accordingly, this interpretation shows that both old and new histories of consumerism still fail majorities since they scarcely provide suitable insights towards racial, gender and colonialist issues, thus continuing to invalidate consumerist mobilizations by people who still suffer from the shortcomings of a transnational neoliberal capitalism system (Faria and Hemais 2021). For this reason, the Brazilian context seems to be a convenient one to investigate, given how its marginalization from consumerism discussions has enabled "alternative" consumerist practices to arise.

For a long time, authorities in Brazil denied the existence of racial identities, resulting in entire populations accepting such distorted reality, especially considering the lack of public policies for the inclusion of racialized people. Even though the myth of racial democracy has been widely disseminated by Brazilian national politics, the fact is that significant racialized portions of the population continue to be oppressed (Gonzalez 2020). In this context, black women have a significant history of survival practices. In the 1970s, during the military dictatorship, Brazilian black feminists presented the Manifesto of Black Women at the Brazilian Women's congress. The Manifesto stated the problematic conditions of black women's lives in spheres of work, economy, and family, and how the dynamics of gender, race, and sexuality shaped the oppressions experienced by them (Collins and Bilge 2021). The mobilizations of those women who dared to highlight problems of intersectionality - anticipating the contemporary knowledge on this topic - and point out a historical period of oppression inspired new generations of black Brazilian women to claim their rights.

By offering an analysis on a type of consumerism neglected by old and new histories of consumerism, this paper aims to investigate consumerist practices carried out by groups of black peripheral women in the Brazilian context. In doing this, we aim to show how their actions can be characterized as a form of consumerism originating from black activism and, thus, broaden the scope of the concept of consumerism, in order to become more inclusive of black diasporas. We focus particularly on an activist group located in the outskirts of Rio de Janeiro, the Women from Salgueiro, as our main example of a consumerism other originated in black diaspora.

Located in Complexo do Salgueiro, São Gonçalo, Rio de Janeiro, the Women from Salgueiro is a collective that has been operating for approximately 20 years, working towards developing socio-educational actions and generate positive social impacts for the community surrounding it. The location where the collective operates is poverty stricken, and experiences grave lack of public policies and adequate services (Tavares 2020). To make things worse, the local government allowed a dump site to surface in the region, harming even more the quality of life of its citizens. Although the dump was deactivated in 2015, its residues still affect the subsistence and salubrity of the nearby community and its natural environment (Lucena 2019). Thus, the Women from Salgueiro collective has participated actively in the fight to guarantee human rights and quality of life for the local population, as well as engaging in actions to encourage sustainable entrepreneurial practices, especially among women from the region.

We argue, then, that the actions undertaken by the Women from Salgueiro constitute a transmodernist type of consumerism, given how it aims to protect intersectional individuals from market failures, but does this based on the realities of the marginalized, those forgotten by traditional capitalist consumerist organizations and activists. It is, therefore, an acknowledgement that the daily life-preserving practices of those excluded by the racialist, sexist and colonialist capitalist system is also a consumerist matter, and consequently worthy of more attention by management and marketing scholars, both in Brazil and abroad.

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In Favor of a Transmodernist Consumerist Education: The Escola Nacional Florestan Fernandes

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Consumerism is a theme that has been debated in marketing since the early 1970s, especially in the United States (USA), when concerns about the protection and defense of consumers against corporate abuses became part of the area's agenda (Day and Aaker 1970; Kotler 1972). The asymmetry of power between companies and individuals in the market motivated discussions on how to resolve such differences and guarantee the fulfillment of consumer rights. On the one hand, it was argued that such objectives would be achieved if greater government regulations on business activities were implemented and changes at the corporate level regarding a greater focus on meeting the needs and desires of consumers were adopted - thus reinforcing the fundamentals principles of marketing (Buskirk and Rothe 1970). On the other hand, it was believed that individuals would be better off at defending themselves if they were more educated about consumption, which involved a broader understanding of their roles as consumers and the performance of companies in the market and the products and services they offered to their public, as this would supposedly make them more aware of their purchases, choosing the options that best suited them (Mann and Thornton 1978).

The consumerist focus on individual empowerment through consumer education emerged in the US around the 1930s, when consumer organizations, such as the Consumers Union (one of the longest-running and most important organizations of its kind in the world), began to carry out comparative tests of products and publish their results in their magazines (Warne 1971). It was believed that companies provided scarce information about the goods they marketed, so consumers had little knowledge of what they were buying and if they were getting the best benefits for their costs. Communicating the findings of these tests, therefore, was fundamental for individuals to be better informed, thus helping them to have more say over the choices they made, resulting in them becoming more conscious consumers (Hilton 2009). Access to information was just part of a broader consumer education movement, which included alerting them about their rights and making them aware of their responsibilities as individual participants in the market (Mann and Thornton 1978; McGregor 2005).

The success of this consumer education model in the US meant that, shortly afterward, it was also adopted by European organizations. Nevertheless, with the end of the Cold War and the advance of capitalist market ideals worldwide, consumerist practices expanded globally, becoming one of the main forms of consumer protection (Hilton 2009). In Brazil (the locus where we live/work and will locate our paper), concerns with consumer education emerged in the 1980s, however were more significantly advanced from the 1990s and 2000s onwards by organizations such as the Movimento das Donas de Casa de Minas Gerais (in English: Minas Gerais Housewives Movement), Instituto de Defesa do Consumidor do Brasil (Idec) (In English: Brazilian Institute of Consumer Defense), and Proteste – the latter two even adopted the practice

of comparative product testing in their consumerist actions, along the same lines as international organizations (Hemais 2018).

When analyzing more critically the consumerist education model adopted globally, it is perceived that it follows a neoliberal capitalistic logic, as it attributes to the individual the responsibility of defending him/herself, which supposedly would be possible since he/she would be equipped with information and knowledge about market practices, becoming an empowered being. Therefore, governmental regulations would no longer be necessary (Nath 2015). However, such discourse disregards that the empowerment promised by this type of education does not occur equally among all consumers, so only a minority can be considered empowered, while majorities still suffer to guarantee their rights (Francis and Robertson 2021; Varman and Vijay 2018; Varman et al. 2021). Without the necessary knowledge and skills, consumers can find themselves in a situation of fragility in the face of corporate market practices, leading them to a condition of vulnerability that is not inherent to their nature. However, such vulnerabilization can occur at any stage of the production, commercialization, or consumption process of goods and services (Silva et al. 2021). Adkins and Ozanne (2005) found an interesting paradox in this regard: while consumer education programs can have positive effects, most consumers with limited knowledge do not seek help, for various reasons.

Therefore, other educational alternatives, which can also serve consumerist purposes of empowering individuals the market, are ignored. For example, the Movimento de Trabalhadores Rurais Sem Terra (MST) (in English: Landless Rural Workers Movement), known for being a political and social movement that seeks the redistribution of unproductive land in Brazil, has as one of its pillars the education of its members so that they can become citizens more aware of their rights (MST 2023). Although its focus is not on the protection of consumers per se, according to the traditional capitalist consumerist molds, its pedagogical guidelines touch on several issues that concern the individual in the market, but in a more collectivist way, so that changes can occur equally for all, and not for only a few (MST 2023). As a result, society is strengthened, curbing corporate advances that harm individual rights, empowering the individual as part of a broader cluster, and more prepared to deal with problems that affect this collective.

For the MST, it is important "to collectively build a set of educational practices towards an emancipatory social project, led by male and female workers" (MST 2023). The movement's initiatives include full formal education for children, adolescents, and adults, following traditional curricula adopted by the Brazilian government. However, in addition to this, in 2005, the movement created a school aimed "to meet the formation needs of militants of social movements and organizations that fight for a fairer world" (AAENFF 2023a), both in Brazil and abroad. The Escola Nacional Florestan Fernandes (ENFF) (in English: Florestan Fernandes National School), named after one of the greatest Brazilian sociologists, provides "meetings and thematic seminars of short duration and training courses for militants developed in several stages (...) higher education courses, (...) specialization and postgraduate courses in agreements with universities and/or developed by social movements and various partnerships" (Mota 2015). Twenty-four thousand people have already taken part in courses and lectures at the school, which has 500 volunteer teachers (AAENFF 2023b).

The way the field of consumerism was shaped in marketing suggests that only one type of consumerist education model can be considered adequate to empower individuals in the marketplace (Mann and Thornton 1978). However, other forms of education, such as that proposed by the MST, should also be considered adequate, even if they originate from a different epistemology than the capitalist and individualist one commonly associated with consumerism. To acknowledge that epistemologies originated in non-hegemonic contexts can also offer knowledges that could be used for consumerist purposes is thus a step towards accepting that other realities of transmodern origin are just as valid to advance discussions about the protection and defense of individuals in the market as those of hegemonic contexts.

Given this contextualization, the objective of this research is to describe ENFF's educational projects, discussing how the school's potentially positive and transmodernist developments can contribute to overcome the inequalities established in the asymmetrical relations of production, commercialization, and consumption associated to consumerism.

Based on the decolonial perspective, which has as its starting point discussions regarding coloniality and the violent erasure that it has promoted against knowledges that are distinct from those associated to modernity, transmodernity would be the space that emerges from "other" onto-epistemologies and seeks to develop itself based on realities that confront the failures of the modernist world (Dussel 2002). The MST and the educational system it postulates would then be a form of transmodernization, as they pave ways of thinking and being different from those of hegemonic origin, but which could, precisely because of these particularities, serve consumerist purposes, given the focus they have in seeking the well-being of the collective, and not just of the individual.

It is hoped that, with such a discussion, this article can contribute to consumerist discussions by analyzing this phenomenon from a decolonial lens, with the purpose of re-discussing the concept of consumerism, so that it can be less focused on individualism aspects and more on a collectivist orientation. Furthermore, by reconceptualizing what consumerism in marketing is - by contemplating knowledges coming from the realities of marginalized majorities -, it is possible to imagine a better understanding on how to resolve several problematic issues currently associated with consumerism, such as racism, sexism, and coloniality, but which are still scarcely acknowledged by the area (Faria and Hemais 2021; Rodrigues, Hemais, and Costa 2022).

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Beyond the Borders of Marketing Systems: The Role of Catalytic Institutions in the Inclusion or Exclusion of People in the Market

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Marketing systems are a core concept of macromarketing and can be defined as "complex social networks of individuals and groups linked through shared participation in the creation and delivery of economic value through exchange" (Layton 2014). Much effort has been devoted to understanding how marketing systems emerge, grow, change and, eventually, die (Layton 2009, 2014). While the macromarketing literature has been addressing the social consequences of marketing for over 30 years (Nason 1989), it is only in the recent years that the failure of marketing systems has received more attention (Redmond 2018, Williams, Davey, and Johnstone 2021, Chadhuri and Jagadale 2021). However, little attention has been given to understanding the mechanisms of exclusion from markets and the experiences lived by those who are excluded. We aim to contribute to the study of marketing systems by understanding more deeply the exclusion of marketing systems. Dixon (1984) places the macromarketing emphasis on the objectives of the marketing system and on the behavior of agents in terms of these objectives, but in this paper, we intend to look beyond the borders of marketing systems and analyze how and why people are excluded from marketing systems. As posed by Lusch (2017), institutions are created to efficiently coordinate exchanges and interactions among parties to the exchanges. We must suppose that the most efficient coordination of markets should be also the more inclusive, but the scenario we see around us is not quite like that. Many people are unable to participate in the housing market and are forced to live with increasing risks to their lives (Muller and Sauerbronn 2022). In a more extreme but still recurrent situation people have difficulty buying food and the world has still to fight food insecurity (FAO 2021). In this study we aim to understand why people are excluded from marketing systems and the social and economic effects of this. Herewith, we want to understand the roles of institutions in the inclusion and exclusion of people in marketing systems. For that, we use the systemic framework presented by Shultz, Rahtz and Sirgy (2017), highlighting the role of catalytic institutions.

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Power Relations in Marketing Systems

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Marketing systems are the performative result of the relational dynamics between structures and agents with mercantile purposes (Layton 2007) and can be understood as complex multilevel systems. For Layton (2009), marketing systems emerge, grow, adapt, and thrive in environments, driven by institutional and technological changes. For that reason, it is necessary to understand the subjacent processes of marketing systems shaping (Layton 2014).

The study of marketing systems makes it possible to understand the patterns and market structures that form, grow, and adapt in human communities, as individuals, groups and entities engage in market exchanges based on values within and across each system (Layton 2019). In this way, researchers of marketing can offer to expand the domains of the subject and bring it more relevance. In an attempt to explain how and why economic exchanges lead to formation, growth and adaptive change of the marketing system, Layton (2014) presented the Theory Mechanism, Action, and Structure (MAS), articulating the theories of social mechanisms, fields of strategic action, and marketing systems. Afterwards, Layton (2015) addressed the development of marketing systems, which prepared the field for the study of path dependency on markets that would come later (Layton and Duffy 2018).

Regarding social mechanisms, Layton (2014) states that agents interact with each other, sometimes cooperatively, sometimes competitively, according to their interests and ambitions. There are hierarchical disputes in search of power, and power relations are commonplace, in a way that common understandings and communication between the agents are necessary, so that voluntary exchanges occur (Layton 2015). The agent's self-interest makes them realize the benefits of economic exchanges, specialization, growth, production in scale, strategic innovation and risk management. To manage all this complexity of relations, it is necessary for the system to self-organize, through norms, conventions, rules, structures and institutions created by the agents themselves, according to their hierarchical position. Finally, as a result of all these dynamics, the system will evolve or regress, depending on the agents whether or not they are met by the way the system is shaped. If the marketing system fails to meet the agent's expectations, they will leave the system, and it may collapse.

The fields of action brough by Layton (2014) are the "arenas" where all social mechanisms occur. Markets can be physical or not (internet), but marketing systems have borders that allow identifying who is inside or outside (Müller and Sauerbronn 2022). These borders are often defined by the system agents themselves, through the dynamics that occur through social

mechanisms, where who is being beneficiaries want stability, and those who are not beneficiaries want to change the rules.

Structures (Layton 2014) are created to stabilize marketing systems, through conventions between the agents, the definition of the roles that each agent (actor) will play, networks and forms of governance. Shultz et al. (2017) brought the concept of catalytic institutions, which would be governments, businesses, and non-governmental organizations. One could add to these three catalytic institutions a fourth, that acts in a decentralized way, which Fowler et al. (2022) called "collectivism". Together, these institutions establish virtually all the structures of the marketing system.

Although studies about structures have evolved from Shultz et al. (2017) with catalytic institutions, and studies on fields of action are evolving with research about the borders of marketing systems (Müller and Sauerbronn 2022), a deeper understanding of social mechanisms is necessary. In this way, this work proposes to study the relations of strengths and power between the agents of marketing systems, drawing inspiration from the work of Foucault (1997, 2001, 2010) to give more robustness to the works of Layton (2014, 2015) and Shultz et al. (2017). Layton (2014) states that the agents seek forms of control and influence, and according to their capabilities, they can change existing power relations. By analyzing the behavior of markets over the time it is noticed that several changes occur by appropriating of institutional power by individuals, by changing their hierarchical positions (Layton 2015).

A first analysis that can be done is that catalytic institutions have more power than individuals, and that is precisely the purpose of its creation. Institutions, in general, are created to provide stability, reduce uncertainties and control the system environment (Layton 2015) – which gives governmentality to the system (Foucault 1997, 2010) – and the way they increase their power is through the association of individuals. Therefore, the individual who is in a high hierarchical position within a catalytic institution, has much more strength to assert his own wills.

Thus, one of the ways to ascend hierarchically in a marketing system is through a catalytic institution. If each catalytic institution is strengthened by its number of adherents, whoever holds power over the institution automatically holds power over all those individuals connected to it. Furthermore, as different institutions compete with each other, the one that stands out in front of the others, will exert its will on all those individuals covered by the other institutions.

For example, if a pastor is leader of a religious community, and he does not want people to drink alcohol, he can exercise his power with his followers (members of the community). If his community has strength enough to convince the government to prohibit the commercialization of alcoholic beverages, the ban will be system-wide. On the other hand, if the president of a beverage company convinces the government to allow this business, the permission is valid for all the system, except for the members of the religious community, who are under the yoke of their spiritual leader. It is worth remembering that these members are there because of their leader's convincing capacity, and their participation is free. On the other hand, the strength of the beverage company is in its economic power. In this hypothetical dispute, different forces are measured, which makes political outcomes even more unpredictable.

It is observed in the given example that who determines the rules for the total system is the government, which is one of the catalytic institutions. In order to have a balance, democratic governments are divided into three powers: executive, legislative, and judiciary. However, there may be an imbalance between the other catalytic institutions, such as business and NGOs. Some corporations are more powerful than some countries, such as the big techs Google, Apple, Facebook, and Amazon, which changed markets by developing technologies for the permanent monitoring of people, that is called surveillance capitalism (Zuboff 2020). Similarly, some NGOs have global strengths (WWF, Greenpeace, Catholic Church, Islamic State) that institute guide rules for their followers. When there is balance between the forces, one can speak of resistance, but when the forces are very unequal, there is domination (Foucault 1997).

The analysis of economic relations is a subject treated in Foucauldian thought, which points out that these relations are always intertwined with the relations of strength and power. The expectation is to determine what are the mechanisms, the effects, and the different devices that exercise power. Also, to assess how these relations are present at different levels of society, in different fields and with varied extensions, proposing an analysis of the way how power relations can be deduced from the economy through the multiplicity of speeches of truth (Foucault 1997).

When talking about the power relations and disputes that occur within the marketing system, it is possible to identify different strengths of individuals and institutions that can change the system balance. The force varies according to the time and context of each marketing system, but some of the main ones can be identified: physical, military, economic, beauty, knowledge, communication skills, ascendence, and ability to convincing.

In marketing systems, physical force cannot be used in the form of violence, because it goes against the principle of voluntary changes. However, physically stronger people have an advantage in menial or security work. In the past, this strength was more important, but today, with technological development, other strengths stand out in the macrosystem.

One of the main strengths in marketing systems is economic capability. Agents with more resources tend to have more power than others, being able to acquire more goods, and hire other people. The owner of a company has hierarchical power over his employees, in addition to bargaining power in negotiation with other companies.

Agents with more knowledge use the asymmetry of information to obtain better planning strategies. In the long term, they tend to grow hierarchically in the system. The analysis of watchful logic (Zuboff 2020) makes sense when thinking about information management, when corporations like Google retain user data from their search technologies, for example.

Communication capability is important for building larger network. Inside marketing systems, for exchanges to take place, it is necessary for agent to know the interest of the others, and the greater the agent's ability to communicate, the more advantage he has in relative to his competitors.

The ability to convince helps the agent to convince others that his ideas are better, getting more support in his demands. It is the main force used by NGOs, which aim to change society's behavior through persuasion. In this topic also enters the production of truth (Foucault 1997). Military forces serve to protect markets from competitors. Mostly, this type of force is used in unstable regions, such as war zones, by militias, or traffickers in neighborhoods abandoned by the government.

Beauty generates sympathy and desire in other agents, which ends up influencing the allocation of individuals in hierarchical positions for personal reasons. This occur both in ostensive situations, such as choosing sellers who are more attractive to the consumer, as well as in the choice of management positions, where beauty can be both a benefit as a problem (favors, moral and sexual harassment).

Finally, according to Foucault (1997), those who are a little stronger do not want to dispute, for fear of randomness; neither do those who know they are weaker want to face it, because they have certain of defeat. Thus, demonstrations of power are common to frighten possible opponents. In marketing systems, these demonstrations are often the ostentation of riches for those who are rich, diplomas and publications for those who are intelligent, photos on social media for who are beautiful, weapons for those who are drug dealers or militiamen. The society of image is very much the result of disputes and insecurities that agents have about their hierarchical positions.

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Ambivalence and Resistance toward Global Brands' Practices: Digital Consumer Activism in a Developing Market Context

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Introduction

Consumer and marketing research on globalization has highlighted both the positive and negative aspects of global brands. On one hand, global brands are associated with modernity, access to high-quality products, and improved quality of life for consumers in developing countries (Sandıkcı et al. 2016; Sharifonnasabi, Bardhi and Luedicke 2020). On the other hand, global brands may be the subject of culture wars in contexts where these brands are considered to be in opposition to cultural values and norms, thus presenting tensions that consumers must negotiate, including eliciting different resistance strategies (Eckhardt and Mahi 2012; Izberk-Bilgin and Roux 2018).

Consumer resistance has been conceptualized as individuals' or groups' opposition to dominant forces (Roux 2007; Galvagno 2011), through practices such as boycotts and voluntary simplicity (Roux and Izberk-Bilgin 2018). Consumer resistance can be specific (e.g., directed at a specific brand), or more general (e.g., directed at the system of capitalism or corporate greed) (Paschen, Wilson, and Robson 2020). The proliferation of the Internet and online platforms such as Facebook and Twitter around the globe presents easy and fast avenues for consumer resistance to be enacted through digital activism (Roux and Izberk-Bilgin 2018). Prior research has examined consumers' utilization of digital spaces such as social media to individually and collectively engage in activism, making their voices heard in contexts such as perceived service failure (Legocki, Walker, and Kiesler 2020), challenging "highly sexualised and objectified representations of femininity" (Matich, Ashman, and Parsons 2020), and challenging marketers' unsolicited marketing communications on online communities (Lillqvist, Moisander, and Firat 2020). Such research has focused on consumers and contexts in developed countries; adequate attention has not been paid to consumer resistance through digital activism in developing country markets, particularly in the context of supply chain and marketing practices of global brands.

This research aims to provide a better understanding of consumer resistance through digital activism in the globalization process in developing country markets by investigating the following questions: (RQ 1) What discourses related to consumer consciousness and choice paradox emerge at the intersection of consumer resistance, digital activism, and globalization? (RQ 2) How do these discourses impact global and local production and consumption systems?

Methodology

The first phase of this research employs a qualitative approach, specifically netnography or the ethnography of online communities (Belk, Fischer, and Kozinets 2013). We focused on content associated with the KFC controversy in Kenya that happened in January 2022 when KFC Kenya posted an announcement on its social media pages indicating that they had run out of chips (French Fries). The company offered customers other options that they could choose from as a

replacement for the fries. This announcement elicited several consumer responses on social media as well as coverage on local and regional news regarding the company's sourcing practices, especially as it emerged that KFC Kenya does not source its potatoes locally, despite the Kenyan market having an oversupply of potatoes from local farmers (Njoroge 2022). We utilized publicly available user-generated content from platforms such as Twitter and Facebook. Several online posts of consumers discussing the KFC Kenya chips shortage, majority of which were derived from #BoycottKFC, were downloaded. This content yielded more than 100 pages of text and images. The data has been manually coded for themes and categories, and the findings are presented in the next section. Netnography data was complemented by online data in the form of newspaper articles and television broadcasts from Kenyan media on the topic.

Preliminary Findings

Preliminary findings that address the first research question (RQ 1) revealed three broad themes regarding consumer ambivalence and resistance towards global and local consumption systems: (1) competing narratives related to the brand's local practices and responsibilities, (2) broader structural barriers that complicate the brand's access to and ability to utilize available local resources, and (3) the complacent global consumer. The first theme revealed two sub-themes of global business realities supporting the brand and its sourcing practices, and consumer expectations for responsible local sourcing practices. The second theme uncovered two sub-themes, unpacking the role of policymakers and brokers or channel intermediaries. These findings are summarized in Table 1.

Table 1: Summary of Preliminary Findings

Themes and Sub-Themes	Brief Description	Example Quote
Theme # 1: Competing Narratives Related to Global Brands' Local Practices 1.1 Global Business Realities 1.2 Consumer Expectations for Responsible Local Sourcing Practices	Consumers defending the company's sourcing practices, arguing that global companies need to do what is efficient. Consumers expressing their expectations for global brands to tweak their business model so that they are more socially responsible in their sourcing practices, rather than sticking to standardized practices that perpetuate inequalities.	*"We can #BoycottKFC all we like, but the day will NEVER COME when KFC buys potatoes that do not meet their global quality control and assurance standards. NEVER."* *"Kenyans are pissed off people not coz KFC ran out of potatoes, but the fact that local farmers got plenty of them but @KFCinKenya got standards. Why can't they train farmers on quality assurance, value addition & international requirements to support local farmers?"*
Theme # 2: Structural Barriers 2.1 Policymakers 2.2 Brokers/Channel Intermediaries	Broader structural barriers that complicate the brand's access to and ability to utilize available local resources.	*"KFC is not the enemy, the government is. We are fighting the wrong enemy. The government does not support local restaurants to be able to compete with giant restaurant chains such as KFC. KFC is not the first company in Kenya to import their raw materials #BoycottKFC"* *"The problem with #BoycottKFC is that our farmers are not part of #KOT brigade. They are in distant places…Who will enlighten the real farmers before brokers exploit them?"*

Theme # 3: The Complacent Global Consumer	Consumer consciousness in the confrontation of the role of consumer culture in supporting global brands and the shunning of local brands.	*"You're here shouting #BoycottKFC over foreign potatoes but you prefer imported alcohol, phones, clothes, cars, shoes, bags, bedsheets, bulbs, paper, eggs & toothpicks et al over local ones & mock local innovations & innovators."*

Findings from online news sources (e.g., newspaper articles), revealed some changes that resulted from consumer digital activism, addressing the second research question (RQ 2). For instance, in February 2022 it was reported that KFC Kenya had reached an agreement with one of the county governments for local farmers to produce potatoes for KFC (Muia 2022). In March 2023, a KFC led initiative resulted in the formation of the Potato Consortium, consisting of five corporations and stakeholders offering various services in the potato value chain to help smallholder farmers increase potato yields and incomes (Amadala 2023). One of the members of the consortium is the company that will purchase potatoes from local farmers and supply them to KFC.

Conclusion

Preliminary findings from consumers' narratives on digital platforms reveal the conundrum consumers in a developing country face as they navigate consumption of a global brand. While there is general consumer backlash against lack of integration of local resources in the global brand's supply chain practices, there is also consumer awareness of institutional and regulatory challenges that limit global brands' range of activities in global markets.

Themes from the preliminary findings collectively provide key insights on consumer expectations for global brands in approaches they take to implement supply chain systems and utilize local resources. While consumers may not boycott the consumption of these products completely, the consumers are becoming more conscious of global brands' practices and altering the social perceptions of these brands through digital activism. Global brands need to re-think their current social and institutional integration in different markets while also understanding and addressing consumer sentiments.

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Historical Research in Marketing Track

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Native Americans in Firearms Advertising: Historical Context and Representational Ethics

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For centuries, the dominant white culture of the United States has appropriated Native American tribal names, language, and imagery for use as school and professional team mascots, place and brand names, and advertising trade characters and their dialog. In the fine arts, many painters, sculptors, and novelists have represented American Indians in their works. Myriad forms of popular culture, from dime novels and comic books to Wild West shows to motion pictures and television, have fed an unsatiable appetite for commodifying Indigenous peoples as imagined by others (Berkhofer 1978). Generations of adults and children dressed as Indians for plays, pageants, and other activities. The photo in Figure 1, for example, was printed from a lantern slide of white children participating in a Hiawatha pageant. Their elaborate clothing and accessories indicate that they probably came from well-heeled families. A real Hiawatha lived in precolonial times and, according to legend, co-founded the Iroquois Confederacy. However, Americans knew the name from a popular epic poem, *The Song of Hiawatha*, written in 1855 by Henry Wadsworth Longfellow. This work had no connection with the actual person.

Criticism of this widespread appropriation and its blatant stereotyping, racism, sexism, and historical ignorance gained traction in the late 1960s, and has remained quite vocal in the twenty-first century. Numerous tribal voices, joined by non-Native advocates for Indian rights, have been raised in opposition (see e.g., Merskin 2001; Race & Ethnicity in Advertising 2023; Sanchez 2012). The U.S. Commission on Civil Rights called for the retirement of Native American mascots in 2001 and the American Psychological Association made similar statements in 2011 and 2014 (Merskin 2012). As will be discussed below, advertising historians also have weighed in with pointed accounts of dubious past practices (Biron 2016; O'Barr 2013; Steele 1996). This mounting censure has persuaded businesses, and perhaps American society at large, to adopt new ethical norms. Mascot, brand, and place names have been retired and popular commercial imagery has been greatly diminished.

The historical arc of one culture marketizing another deserves serious consideration. This paper aims to extend historical research on the topic by investigating how Native Americans have been represented in firearms advertising and promotional ephemera. The firearms connection is important because American Indians have had a very long and deep association with guns, one that had devastating consequences for them and their ways of life (Silverman 2016). Evidence from three manufacturers will be examined. Savage Arms used Indian trade characters to sell its rifles around the turn of the twentieth century when cultural appropriation had become wide-ranging. A few years later Remington Arms tried its hand and Winchester Repeating Arms did so again in the late 1960s when opposition to such stereotyping had begun to materialize. Commercial exploitation raises questions of representational ethics, a topic within the macromarketing domain (Borgerson and Schroeder 2008; Schroeder and Borgerson 2005; Merskin 2012).

Primary visual sources include oil paintings, prints, magazine ads, trade cards, posters, and additional promotional ephemera. These data come from the digital collections of the Smithsonian Institution, the Library of Congress Prints and Photographs Online Catalog, the Digital Commonwealth (Massachusetts Collections Online), the Amon Carter Museum of American Art in Fort Worth, Texas, and the Roy Marcot Firearms Advertisements Collection in the McCracken Research Library at the Buffalo Bill Center of the West in Cody, Wyoming. Searches of listings on eBay and online auction sales catalogs revealed additional sources, especially for later twentieth century material. Gordon Fosburg shared Remington ads from his extensive private collection. A visual database of art and advertising representations of Native Americans was constructed and from this group particularly expressive images were selected for the figures. Assembling these sources entailed an iterative process where insights gained from interpreting a set of visual data would trigger new searches that led to still more evidence and further analysis.

The paper begins with relevant historical context. It first recounts the general upsurge in placing American Indians in advertising, along with the simultaneous craze for collecting indigenous material culture (Hutchinson 2009; Valdes-Dapena 2004). Next, the paper presents a brief history of Native American gun culture and how it was depicted visually in important paintings by three noted Western artists. Subsequent sections examine Savage, Remington, and Winchester advertising that appropriated Indian characters and language. The final sections consider the societal implications and representational ethics of Native Americans in gun advertising before ending with a few concluding thoughts.

Following the custom of leading historians who specialize in this area (see, e.g., Hämäläinen 2022; Silverman 2016), the terms "Native American," "American Indian," and "Indian" will be used interchangeably. Interestingly, most Indigenous people in North America refer to themselves as Indians though it was whites who coined this collective noun centuries ago (Berkhofer 1978). Tribal names will be applied when and where they are known. "First Nations," a term popular in Canada, seems less pertinent to U.S. history and will not be utilized.

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A copy of the full paper with complete reference list and all figures can be obtained from the author (terrence.witkowski@csulb.edu). Below are a few selected images.

Figure 1. Children dressed in Native American clothing, ca. 1913-1950. Photograph from glass lantern slide. Source: Boston Children's Museum via Digital Commonwealth.

Figure 3. Trade card, Magnolia Ham, ca. 1880. Louisville Lithographic Co. Source: Boston Public Library via Digital Commonwealth.

Figure 8. *Crow Indians Hunting Elk* by Charles M. Russell, 1890. Oil on canvas, 18 1/8 x 24 in. (46.0 x 61.0 cm). Source: Amon Carter Museum of American Art.

Figure 11. Ad for Savage .303 Model 1899 Hammerless Repeating Rifle, *Recreation*, March 1899. Source: Roy Marcot Firearms Advertisements Collection, McCracken Research Library, Buffalo Bill Center of the West.

Figure 16. Remington cover for *Hardware Age*, December 22, 1932. Source: Collection of Gordon Fosburg.

Figure 18. Winchester poster, circa late 1960s. Paper, 37 x 26 in. (94 x 66 cm). Source: Rock Island Auction (2022).
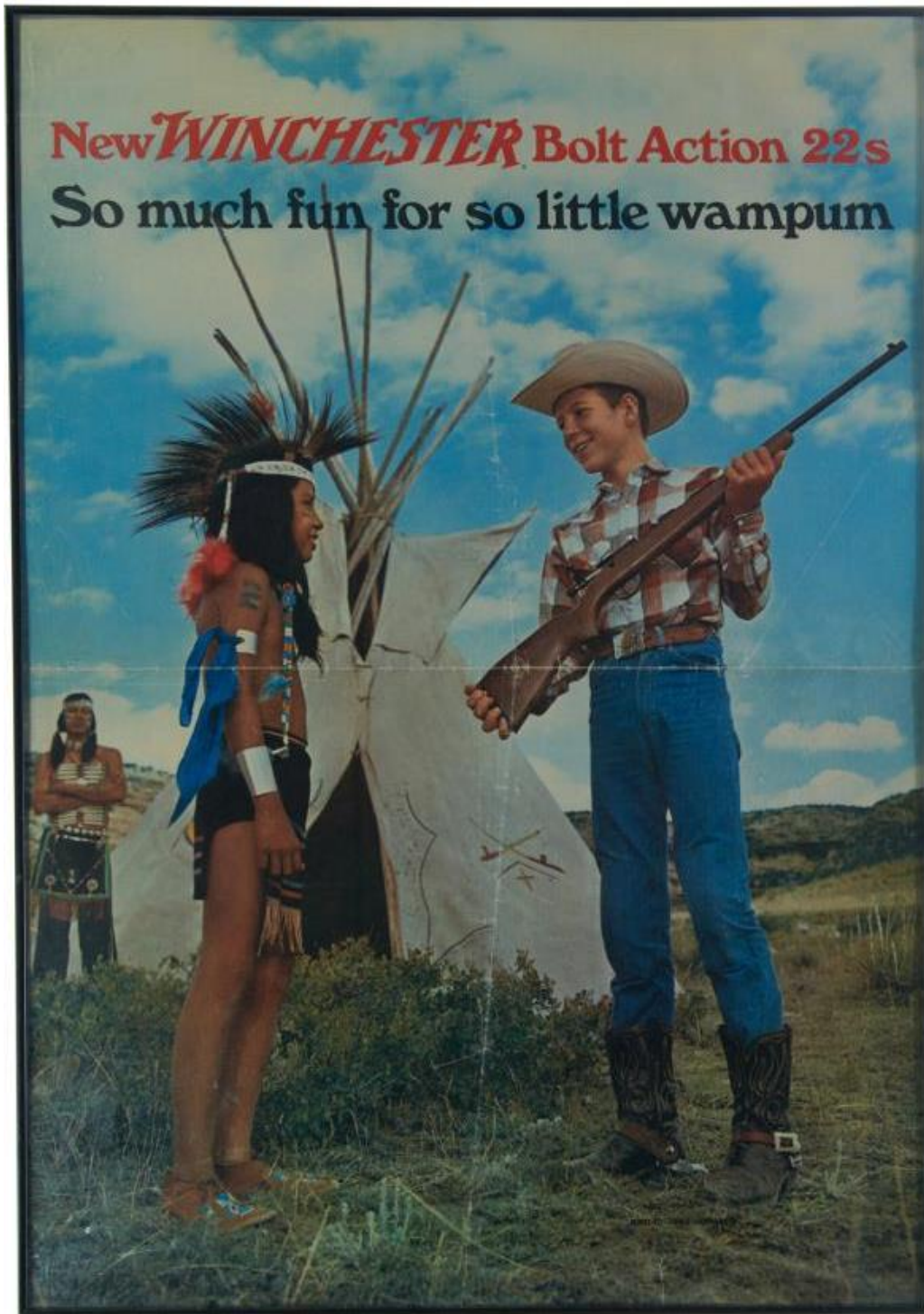
Figure 21. The author as Indian boy in war paint, circa 1954. Source: Collection of the author.

Macromarketing Measurements and Methods Track

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Detecting Value Loss, Power Asymmetry and Underperforming Provisioning Systems: Extending Alderson's Transvection Analysis to increase Sustainability

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Business research has offered many tools to understand the opportunity for firms to create or realise value in the provisioning system. It has been less forthcoming on tools to understand the relationship between different members of the provisioning system and to understand the distribution of costs and profits through the system. Building on the work of Wroe Alderson, we provide a tool — the extended transvection — to analyse a provisioning system that provides insights into; information flows, value creation/capture/loss, risk, externalities, equity and fairness, and underperforming provisioning systems. The extended transvection also allows for considering scenarios regarding adjusted/alternate provisioning systems.

Supererogation Theory: Towards a Macromarketing Understanding

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The turn of the twenty-first century marks the significant shift in the temporal horizon of societies, and the businesses that operate within them, regarding their impact upon global ecology. The need to reduce the deleterious effects of business activities has become enshrined in Corporate Social Responsibility (CSR) frameworks and legislation but there is a growing recognition that the study and performance of this alone is insufficient to achieve triple–bottom-line (TBL) sustainability (Barnett, Henriques and Husted 2020; Fukuda and Ouchida 2020; Humphreys 2014; Li, Wang, and White 2015; Mazutis 2014; White, Samuel and Thomas 2022).

Looking beyond the mandatory legislation, philanthropic and otherwise meritorious ecological endeavours are to be found throughout human history, but in reality "*few people address human obligations regarding the nonhuman world*" (Gladwin, Kennelly, and Krause 1995), and even seemingly commendable initiatives can be found to be disturbingly lacking when examined in detail (Prasad and Elmes 2005). See for example recent reporting's on Verra, the World's leading carbon offsetting organisation that argues 90% of their rainforest offset credits (used by companies such as Disney, Shell and Gucci) fail to deliver genuine carbon reductions (Greenfeild 2023).

The difficulties of reconciling the pressing material needs of today with the prospective consequences of those actions tomorrow is reflected in the dichotomous business literature including special issues in the Journal of Macromarketing regarding Sustainability as a Megatrend (Prothero and McDonagh 2014). Hancock (2008) expresses concern that the 'ethical organization' discourse is dominated by two quests. First, the deontic, to understand and prescribe the codes of conduct and legislative practices that organizations must follow. Second, the aretaic, to determine the ethical principles that organizations should uphold in order to be truly sustainable. Ezzamel and Willmott (2014) also question the validity of the theoretical and practical divide that adopts either an anthropocentric or an ecocentric perspective, neither of which they argue is sufficient to achieve sustainability. They venture that organization and management theory as a whole is dominated by anthropocentric views of the world that "*impede the emergence of alternative (e.g. ecocentric) organization theory*" (p.1031). Their emphasis of the 'ethical register' is contingent to the development of knowledge that is cognizant of the biosphere within which organizations not merely operate but are dependent upon since "*virtually all production and welfare are totally dependent upon ecological health*" (Gladwin et al. 1995). This is in stark contrast with the realization that the biosphere is not reciprocally dependent upon organizations and is likely better served without such edifices.
Gladwin et al (1995) highlight the "*pathological dangers*" (p.875) of myopically progressing either the dominant technocentrism or emerging ecocentrism paradigms, and afford a means of reconciling the rift by proposing the notion of 'sustaincentrism'. This paradigm is "*grounded in the good of both human and nonhuman nature*" (p.891) but they admit is lamentably lacking in implementation. Sustaincentrism is a worldview that attempts to reconcile technocentrism and ecocentrism that are "self-defeating" (Gladwin et al. 1995). It recognises the infinite

interconnectivity between humanity and the environment, and that human needs may not supervene those of nature.

The contribution of this study is to expand the notion of supererogatory acts by recognising that they go beyond the superficiality of CSR (White, Samuel and Thomas 2022) and may be considered and conducted, in a non-reciprocal arrangement, for the benefit of non-human and future recipients. Thus, making the theory relevant to both advancing the idea of sustaincentrism and macromarketing scholarship that includes sustainability (Mittelstaedt et al. 2014; Prothero and McDonagh 2014), climate change (Helm and Little 2022), CSR (Humphreys 2014), quality of life (Layton 2009; Lee and Sirgy 2004) and marketing systems (Layton 2009; 2019).

The notion of supererogation, which to date has attracted no attention in macromarketing literature refers to those actions that 'go above and beyond' what may be expected of individuals or organizations and are carried out for the benefit of others without concern for the self. Heyd (1982) argues supererogatory acts are identified by the presence of four necessary conditions (Heyd 1982): (i) The acts are neither mandatory nor illicit, (ii) whose omissions are not wrong, and do not deserve sanction or disapproval, (iii) are morally good, both by virtue of their intended consequences and (iv) are done voluntarily for the sake of someone else. In summery supererogation activities are suggested to be good to do but not bad not to do (Chisholm 1963; Urmson 1958) and are completed by an agent who possess altruistic intentions (Heyd 1982). Heyd (1982) presents an established taxonomy of supererogatory acts consisting of six acts:

1. ***Moral Heroism:*** Heyd (1982. 144) posits moral heroism as "*overcoming natural fears, desires, and considerations of self-interest, and also great self-sacrifice either in terms of risk, or moral virtues and, in most cases, deserves praise and admiration.*"
2. ***Beneficence***: This is concerned with the act of giving and "*the contribution of one's material goods*" towards causes that one may have a limited responsibility for (Hyde 1982.146).
3. ***Volunteering:*** Hyde (1982.150) argues that volunteering is a special kind of supererogatory act outlined as "*the offering of one's services (help etc) to do something*" for which there is no reason why they should do it or there is good reason they should not do it.
4. ***Favour:*** Heyd (1982) argues favours consisting of small acts of kindness that require limited if any personal sacrifice.
5. ***Forgiveness:*** Heyd (1982) posits that forgiveness becomes supererogatory when it is enacted in situations where appropriate punishment is justified.
6. ***Forbearance:*** Acts of forbearance "*involve doing less of the due amount of something which is undesirable to another person*" (Heyd 1982 p.153)

In addition to this White, Samuel and Thomas (2022) added a seventh act to the taxonomy indicating that sharing should also be considered as a supererogatory act. Each of these acts are suggested to be praiseworthy and favourable, however they are not required moral obligations for any organisation or individual to follow.

We posit that each of Hyde's (1982) and White, Samuel and Thomas (2022) seven supererogatory acts can evolve from a micro anthropocentric taxonomy to become a

macromarketing, sustaincentric framework capable of measuring and informing pro-environmental macromarketing scholarship and practice.

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Discovering Macromarketing Networks in Academia and Twitter

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This study encourages macromarketers to become familiar with network analysis. It first argues for network analysis as an advantageous alternative to other analytical techniques such as categorization and classification when the data analyzed is complex. Then it introduces two cases that examine co-occurrences: keywords in academic articles, and hashtags and user names in Tweets. The findings of the former characterize research thematics in macromarketing with consumption and sustainability, as well as marketing systems as areas of key interest. The latter, in turn, exhibits how macromarketing is displayed to the public and highlights the importance of activities and journals. The two cases also demonstrate how network analysis can be performed on varying sets of data and which matters require attention when curating data and making parametric choices.

Introduction

The academic field of macromarketing is interesting from the perspective of network analysis because it examines systemic interactions among markets, marketing and society while also covering an extensive range of thematics and approaches (Hunt 1981; Grossbart and Layton 2006; Wooliscroft 2021). Network analysis examines structures consisting of objects and their relationships, and as a methodology it is suited to recognizing such relationships even when the networks observed are complex. DeQuero-Navarro, Stanton, and Klein (2021) explore such complexity in their review on macromarketing recognizing 13 topics of interest, of which several are divided into subtopics[3]. The authors also connect key articles falling under these topics to their contributions to theory and conceptual models, applied understanding of constructs, type of methodologies applied, and guidance on research agenda.

Earlier review articles on macromarketing have followed a similar categorical or typological approach: Shapiro, Tadajewski, and Shultz (2009) on a research collection and Layton and Grossbart (2006) as challenges and scenarios. Works such as these guide the field as Ekici, Genc, and Celik (2021) can confirm in their interesting category-based article on how macromarketing has responded to visions set out by Fisk (2006) and Peterson (2006).

Large sets of data have not been common in the analyses of macromarketing due to focus in research designs. For instance, the panoramic article of Dequero-Navarro, Stanton, and Klein (2021) relied on 108 articles whereas Shapiro, Tadajewski, and Shultz (2009) used a total of 189 readings. While these certainly are high numbers, the selection process inevitably leaves out

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[3] The topics recognized by DeQuero-Navarro, Stanton, and Klein (2021) include the following: 1 Marketing systems, 2a Economic development, 2b Poverty alleviation, 2c Globalization, 3 Externalities, 4a Sustainability, 4b Sustainable consumption, 5 Quality of life, 6a Distributive justice, 6b Consumer vulnerability, 6c Macromarketing and reconstruction: Natural and human-induced disasters, 7a Marketing ethics, 7b Corporate social responsibility, 8 Governance: Public policy and regulation, 9 Consumer culture, 10 Critical marketing, 11 Emergent theme: Religion's implications for macromarketing, 12 Emergent theme: Social entrepreneurship, and 13 Emergent theme: Macro-social marketing.

many articles. What if one were instead to analyze all articles identifying themselves as macromarketing – how would the panoramic view then look? Further, how could connections between macromarketing thematics be recognized in such a large set of data? A study that addressed these questions could also help overcome issues relating to selectivity, and see pluralism fostering vitality and creativity in macromarketing (Layton and Grossbart 2006). This paper demonstrates the use of network analysis to explore macromarketing thematics and their connections. Two instances of network analysis are performed to demonstrate how both structured and unstructured data can be explored. The first network examines academic works, i.e almost 1200 articles retrieved from the Clarivate Analytics Web of Science database (Web of Science 2022). The second, in turn, examines how the macromarketing community reaches out to the public in over 1900 short messages in Twitter (Schmidt 2014; Twitter 2023). A major advantage of network analysis compared to other procedures, such as categorization and classification, is that it distinguishes foci in the field as well as connecting them to each other. A comparison of the two analyses further recognizes differences in how macromarketing is represented in scholarly works and how it is communicated to the public.

Networked Macromarketing
Several published network analyses consider contributions in macromarketing. Many of these analyses have concerned focused thematics such as social marketing (Farrukh et al. 2021), franchising (Alon and Bretas 2021), digital marketing (León-Castro et al. 2021), historical research in marketing (Akpınar, Çetin, and Tiltay 2021), entrepreneurial marketing (Ferreira and Robertson 2020), and the bottom of pyramid concept (Merigó and Pineda-Escobar 2020).

These analyses show that macromarketing has not only made important contributions in these thematics, but that a network approach is useful in examining complex matters. One particular strength of network methodology is that it can present tabular data in statistically processed and visualized ways. Thereby it may recognize perspectives that extend beyond categorizations, whether simple or complex. For instance, the Web of Science categorizes macromarketing articles as belonging to 'business' (90.7%), 'management' (7.9%), 'economics' (7.5%), 'history of social sciences' (3.0%), and smaller shares in an additional 19 categories (Web of Science 2023). While this categorization can be considered apt, it is arguably overly simplistic and raises further questions on how the categories are defined. A very detailed categorization, in turn, would require complex tables or large numbers of them.

Network analysis represents an attempt to overcome the rigid structure and definitions required in categorical tabular data. Keyword co-occurrences have become a pivotal technique for analyzing contents and concepts across articles. For instance, de Lima Dantas (2021) used keyword co-occurrences when examining how macromarketing articles relate to the fields' outlined thematics. Keyword co-occurrences were also used in several of the above-mentioned articles examining focused marketing thematics (Alon and Bretas 2021; Farrukh et al. 2021; Ferreira and Robertson 2020). One notion which merits attention is that it is useful to see concepts or co-occurrences in relation to each other rather than representing fixed dimensions or associations (Latour 2005).

While Twitter has certainly been of interest in macromarketing research (Fischer 2019; Lee, Cherrier and Belk 2013), data from Twitter has to the best of the author's knowledge not yet

been used to profile macromarketing. A similar co-occurrence technique as in the case of article keywords is applied in this study, and makes use of a tweet's coded hashtags and user accounts to help in positioning data. While the analytical techniques are similar in the two demonstrations, the data types are in fact quite different because bibliographical data is highly structured whereas Twitter data is unstructured (Holmlund et al. 2020).

Data and Methodology
The bibliographical data from 1194 macromarketing articles were retrieved from the Clarivate Analytics Web of Science (2023) using the search string 'macromarketing'. This data set was processed with the VOSviewer software tool to construct and visualize bibliometric data (van Eck and Waltman 2010). The co-occurrences of keywords that appear five times or more in the data are visualized with standard parameters in Figure 1.

The short messaging Twitter data consists of 1916 tweets which were acquired through the academic research access to Twitter API (v2). Hashtags are here used in a similar way as keywords in academic texts because they summarize and connect contents. User account names are also used to make it easier to position connections. Because neither Twitter hashtags nor user account names follow even a loosely formulated set of codes, some preparatory data curation is required. Hence, all Twitter data is converted to lower case letters and only items which appear more than 5 times are analyzed. The Gephi data visualization software (Bastian, Heymann, and Jacomy 2009) is used in a similar way as VOSviewer for academic articles (Figure 2). Clustering is performed with the modularity algorithm (Blondel et al. 2008) and network visualization using the Yifan Hu proportional layout (Hu 2005).

Findings
This section describes the findings from network analysis of co-occurring keywords published in academic macromarketing articles and hashtags as well as usernames in Tweets. Recognized clusters are described through their main contents and connections with other clusters. Findings from the two analyses are compared in the final section to find differences in how macromarketing is viewed in academia and by the public.

Academic Keyword Networks
Keyword analysis of a substantial number of academic articles reveals networked insights into the thematics and approaches evident in macromarketing. The applied standard layout and clustering parameters recognized eight clusters in the keyword network, and a qualitative analysis described these clusters and their connections (Figure 1). *Consumption and sustainability* (in red) and *Marketing systems* (yellow) emerge as key clusters which also connect to the other clusters. Other thematics include *Culture and identity* (orange), *Ethics and behaviour* (green), *Policy and education* (purple), *Service-dominant logic, innovation and value co-creation* (light blue), *Entrepreneurship and the economy* (brown), and *Poverty* (blue).

Figure 1. Clustered keyword network of macromarketing articles
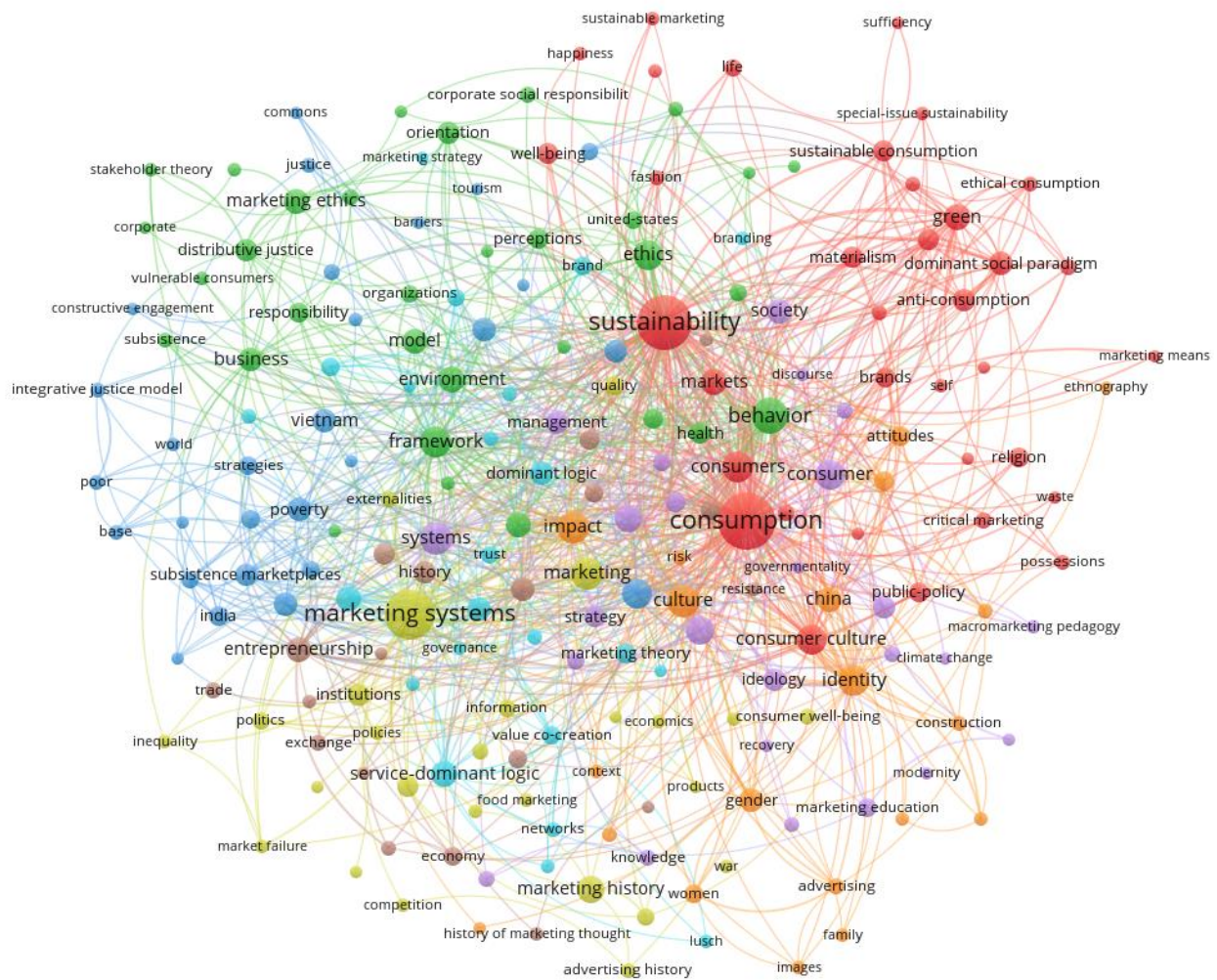
Consumption and *sustainability* appear as two key nodes in the examined set of macromarketing articles and are part of the same cluster marked in red. Within this cluster, besides sustainability, consumption also relates to 'consumer culture', 'consumers', 'markets', 'marketing', 'brands', and 'materialism'. The sustainability aspect, in turn, is positioned closer to 'well-being', 'fashion', 'anti-consumption', and 'dominant social paradigm'. This dichotomy between consumption at large and the perspective of sustainability is also reflected in the connections with other clusters. While both consumption and sustainability are widely connected to all clusters, consumption is more closely positioned to issues in marketing history and retailing (vs. institutions, marketing, and society) in the Marketing systems cluster (yellow). The issue of sustainability, on the other hand, is more extensively connected to the cluster on Ethics and behavior (green), with a greater focus on 'health', 'distributive justice', 'responsibility', and 'reflections' (vs. 'corporate social responsibility' and 'consequences').

Marketing systems (in yellow) emerges as a major cluster but appears quite different from the cluster of Consumption and sustainability (red). The cluster is quite compact, with the central keyword 'marketing systems' being connected to 'institutions', 'marketing and society', 'marketing history', 'politics', 'competition', and 'regulation'. At the same time, marketing

systems connect extensively to the other clusters. Therefore, the marketing systems cluster should not only be seen as a focus in macromarketing but also as an approach for examining many matters of interest in macromarketing.

The other six clusters do not revolve as clearly around accentuated keywords. *Ethics and behavior* (in green) is characterized by 'distributive justice', 'model', 'environment', 'corporate social responsibility', and 'health'. It is noteworthy that its main connecting clusters are Consumption and sustainability (red), Marketing systems (yellow), and Culture and identity (orange).

The cluster on *Culture and identity* (in orange) brings together matters relating to 'gender', 'women', 'advertizing', 'obesity', and 'images' on the one hand and 'China' as an item of its own on the other. It is evident that, in particular, 'impact' and also 'culture' and 'identity' connect to all other clusters, indicating their important roles in macromarketing.

Service-dominant logic, innovation, and value co-creation (in light blue) forms a cluster of its own around these keywords and connects closely to Marketing systems (yellow) and Consumption and sustainability (red) and to a lesser degree to 'marketing education' and 'perspectives' in the cluster on Policy and education (purple). In turn, the cluster on *Policy and education* (purple) brings together 'pedagogy' and 'education' with 'policy', 'strategy', and 'perspectives', which for their part connect widely to the other clusters in a similar way as the concept of 'impact' does. Interestingly, the 'consumer' as an individual is addressed in this cluster in a critical way, covering matters of 'ideology' and 'neoliberalism' as well as 'vulnerability', and connecting to the cluster on Consumers and sustainability (red), where consumers are treated collectively in terms of 'materialism' and 'anti-consumption'.

Entrepreneurship and the economy comes forth in a cluster of its own (in brown) with keywords such as 'trade', 'exchange', and 'technology', and with connections to the large clusters on Consumption and sustainability (red) and Marketing systems (yellow), but perhaps more interestingly also to the more focused clusters on Poverty (blue) and Culture and identity (orange). Finally, the *Poverty* cluster (blue) is the most focused of all, and involves keywords such as 'poverty', 'globalization', 'subsistence marketplace', 'quality of life', 'growth', 'integrative justice model', and countries such as 'India' and 'Vietnam'. The *Poverty* cluster further connects to the large clusters on Consumption and sustainability (red) and Marketing systems (yellow), as well as the cluster on Culture and identity (orange), indicating that it is indeed a thematic rather than an approach.

The network findings are in parallel with the topical organization in DeQuero-Navarro, Stanton, and Klein (2021). The two largest clusters ('Consumption and sustainability'; 'Marketing systems') have direct counterparts ('Sustainability and sustainable consumption'; 'Marketing systems') and three of the remaining six clusters associate well ('Culture and identity' - 'Consumer culture'; 'Ethics and behavior' - 'Marketing ethics and corporate social responsibility'; 'Poverty' - 'Economic development, poverty alleviation and globalization'). Interestingly, three clusters do not have direct counterparts: 'Service-dominant logic, innovation, and value co-creation', the education dimension of 'Policy and education', and the economy dimension of 'Entrepreneurship and the economy'. The remaining topics recognized in

DeQuero-Navarro, Stanton, and Klein (2021) appear in keywords but do not emerge as distinct clusters with the granularity applied in the network analysis.

A comparison of the findings against those in DeQuero-Navarro, Stanton, and Klein (2021) is interesting because the network analysis examined a significantly larger data set and focused on co-occurrences of keywords rather than a categorization of topics. It further recognized connections between clusters, positioned them in relation to each other, and recognized scales of scholarly interest. Finally, network analysis showed that interests in leading scholarly publications are widely shared in the scholarly macromarketing society at large.

Tweet Networks
A network analysis of tweets shows how macromarketing appears to the public. Tweet hashtags and usernames are used in the analysis, which is conducted in a similar way as the analysis with article keywords. Co-occurrences of hashtags and usernames form the data, and analysis reveals clusters of data and connections between the clusters. A similar number of clusters is targeted to demonstrate the relative character of the analysis, which requires setting appropriate network parameters and making data curation choices (Yifan Hu proportional layout, connection filtering (K-core: 5), including 5 instances or more, examining core network). It is also important to note that the macromarketing Twitter network is quite small because so many posts lack hashtags. Seven central clusters are recognized as an outcome of this procedure (Figure 2).

Figure 2. Clustered hashtag and username core network of macromarketing Tweets.

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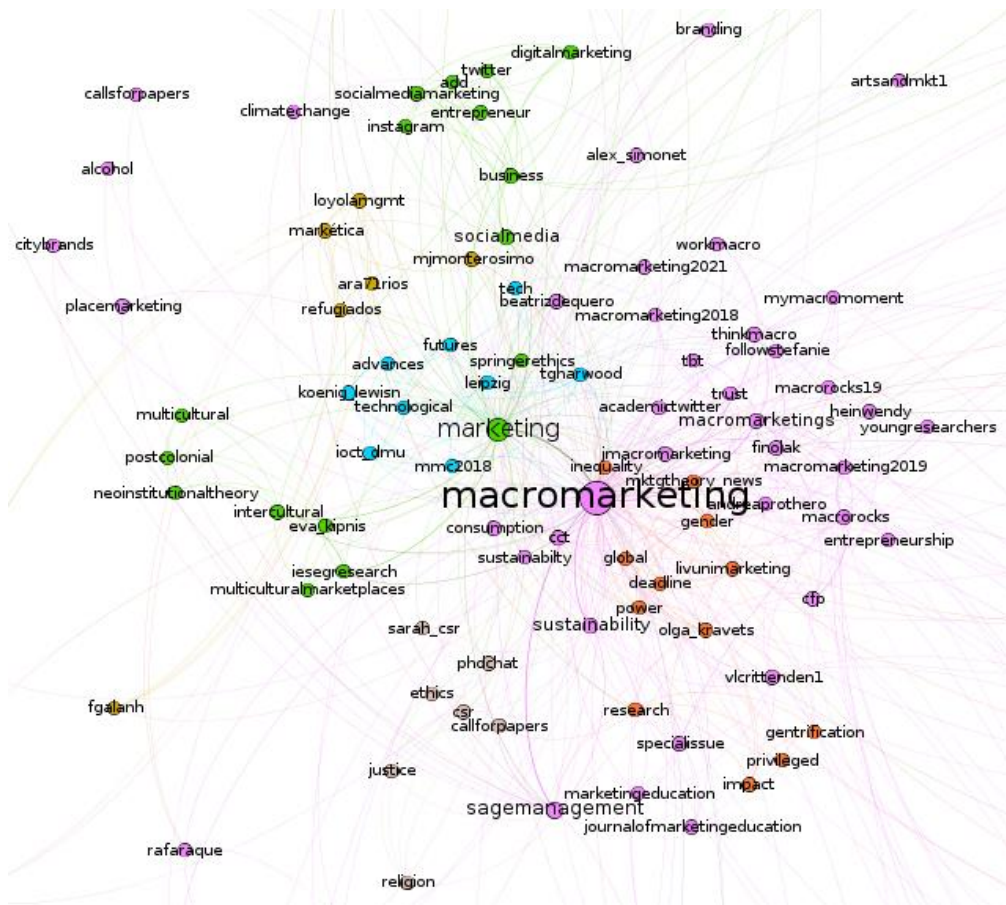
The distinctly largest cluster is concerned with *Macromarketing's Twitter Core* (in purple) and involves thematics, approaches, activities, and journals. 'Consumption', 'sustainability', and 'branding' emerge as thematics, with 'cct' (consumer culture theory) and 'marketingeducation' as examples of focuses. Even more so, tweets highlight the role of activities and journals. Macromarketing conferences, in particular, are accentuated, and journals such as Journal of Macromarketing, Marketing Theory, and Journal of Marketing Education brought forth. Hence, the key perspective on macromarketing as seen by the public in Twitter appears in terms of the society's annual conference and key journals as well as particular thematics and focuses. Macromarketing, being the central node in the network, connects to all other clusters.

The *Marketing* cluster (in green) complements the main cluster with two parallel sets of contents. Firstly, marketing is directed towards social media networks ('socialmedia', 'socialmediamarketing', and 'digitalmarketing'). Secondly, marketing is approached critically in the context of multiculturality ('multiculturalmarketplaces', 'postcolonial', 'intercultural'). Similarly, the cluster on *Technological advances* (light blue) also complements macromarketing thematics with a focus on change ('technological', 'tech', 'advances', 'futures'). Neither of these clusters have major connections to other clusters than the core cluster, which emphasizes that they provide thematic expansions for the Twitter public.

The *Inequality* cluster (in orange) continues with a critical macromarketing view. Inequality is seen in terms of conditions and developments ('global', 'power', 'gender', 'gentrification', 'privileged', 'impact'), and this cluster connects not only to the core cluster (purple) but also to the Marketing cluster (green) that covers social media and multiculturality. The *Refugees* cluster (light brown) ('refugiados') is also connected to these two clusters.

Ethics (in grey) also forms a cluster of its own ('ethics', 'justice', 'religion'), which is connected to the core cluster (purple) and the Marketing cluster (green). There is an additional cluster of interest, which is not depicted in Figure 1, namely a *Well-being* cluster ('wellbeing', 'healthcare', 'healthsafety', 'protection', 'safety'). *The Ethics cluste*r connects to both the core cluster (purple) and the Marketing cluster (green), whereas Well-being connects only to the core cluster.

In conclusion, macromarketing Tweets display thematics, approaches, and activities to the public. Much attention is connected to the field's conferences and publication activities, but examples of thematics and approaches are also evident. The public presentation of macromarketing in Twitter seems to contrast with that in the field's academic publications, which is discussed next.

Comparative Discussion
While macromarketing journal articles and tweets have different audiences and contents, they do cover similar thematics. Network analyses examining keywords and hashtags show that similar key terms are evident in both arenas: consumption, sustainability, ethics, well-being, and marketing. It is also not surprising that the body of academic macromarketing work is considerably larger in terms of volume and endurance. Macromarketing tweets are indeed more focused and activity-driven, concerning conferences and journals.

Academic interest in consumption and sustainability as well as policy and education finds counterparts in tweets on Macromarketing's Core, albeit the latter additionally focuses heavily on activities. Academic focus on service-dominant logic, innovation, and value co-creation can be seen to relate to tweets on technological advances, although, of course, they cover much more than that.

It is clear that the idea of marketing systems does not appear in tweets the way it does in academic publications. Similarly, entrepreneurship and the economy receive little attention in tweets. Cultural and identity matters, in turn, are handled quite differently as part of ethical matters that further connect to inequality and well-being.
This comparison of results of network analyses show that there is a clear difference between how macromarketing presents itself to academia and to the public. Although some of the differences can be attributed to the type and limitations of the Twitter data set, it can nevertheless be concluded that whereas macromarketing scholarship is broad and thematically interconnected, its tweets are thematically more focused and highlight activities such as conferences. This comparison suggests that the public's perception of macromarketing may be more limited than is academically documented. Both types of scholarly activity have distributed authorship although there is also centralized authorship in tweets, so differences may also accrue simply because some scholars tweet more than others.

Conclusion and Future Work
This paper has demonstrated the use of network methodologies to explore thematics and their connections in macromarketing. The first analysis was based on co-occurrences of keywords in scholarly macromarketing articles and recognized eight clusters, of which *Consumption and sustainability* and *Marketing systems* were most prevalent, with a range of other clusters also evident. Connections between keywords within clusters as well as between clusters could be reviewed through network analysis in a way that is difficult to achieve through categorization, for instance, because macromarketing is such a large and varied scholarly field (see DeQuero-Navarro, Stanton, and Klein 2021, Shapiro, Tadajewski, and Shultz 2009). The findings can also be seen as starting points for further research. For instance, deeper scholarly insights could be achieved by comparing keyword networks with select articles in those fields or focusing analysis according to relevant criteria or dimensions. Another interesting opportunity would be to recognize how thematic interest has evolved over time.

The analysis of macromarketing tweets, in turn, demonstrated the use of network analysis on a much more varied set of unstructured data. The public is given a more activity-based view of macromarketing which revolves around conferences and journals, as well as a more selective set of thematics than that directed to scholars. This observation emerged from a demonstration of a comparison of the findings from a network analysis.

While network analysis is generally apt for examining scholarly fields and subfields, it suits the examination of any coded connections. Benefits of the approach pertain to good scalability of methodology with large data sets and, due to its relative qualities, also to overcoming challenges relating to fixed definitions (Latour 2005). The network metaphor can assist in visualizing complicated sets of data. Challenges relate to coding and meanings attributed to codes, data

curation when using non-standard data sets, as well as making parametric choices when accommodating data to research designs.

Macromarketing scholars are in an advantageous position when examining social marketing thematics and connections. Social media such as Twitter and Tumblr provide application programming interfaces, which help in collection of large data sets, and methodologies such as network analysis make it viable to analyze them. Performing analysis with many other types of data is achievable, and requires development of research designs, data curation, and methodological configurations.

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Observations on the First Twenty Years of the Macromarketing Seminar Proceedings

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Recently a sub-committee of the Macromarketing Policy board organised the digitisation of the early proceedings of the Macromarketing Seminars (conferences). I was not involved in that project, but have been indexing the proceedings while tidying up some of the scans. This presentation represents first observations on the wealth and diversity of methods, approaches and topics from the first two decades of proceedings.

Macromarketing Pedagogy Track

Co-Chairs:

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Debate, Discussion, or Dialogue: What's the Ideal Format for Macromarketing Learning?

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Stefanie Beninger, Nyenrode Business University, The Netherlands
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Introduction

Macromarketing focuses on societal issues, including the impact of marketing on society, society on marketing, and the broader systems in which marketing operates. Such a focus denotes a certain amount of "messiness", where issues are seldom fully understood and where there is rarely – if ever – a unanimous agreement on the issue cause and effect. Indeed, scholars who acknowledge such complexities suggest that only when multiple views and values are incorporated might a reasonable forward action be found (Pittz, Steiner and Pennington 2020).

Given this challenge, as well as calls by accreditation boards, marketing educators are increasingly looking for tools in the classroom that encourage a diversity of thought and outcomes, with the goal of developing critical thinking and problem-solving skills. As macromarketers, we aim to equip our students to think about complex, systemic problems, and we recognize that there are rarely simple answers to wicked problems. Accordingly, we also acknowledge that training students how to think and grapple with these complexities will require pedagogy beyond the lecture-based format. We cannot impart to students the "right" answers for tomorrow's questions; they need to be prepared to confront those challenges themselves, with a range of tools at hand. Here, we offer a perspective on how to help students develop the tools that permit a broader, more inclusive framing of society's challenges and therefore a greater likelihood of being prepared to confront them.

The 3Ds of Controversies

In what follows, we propose that a combination of the use of academic controversies and a carefully designed scaffolding of debate, discussion and dialogue offer a valuable means to developing the perspective just described. Each offers its own pedagogical power, but, in combination, they illustrate to students how to generate both a broad appreciation for diverse views, and a range of possible solutions to complex issues.

The 3D's

As a pedagogical framework (summarized by Nagda et al. 2008), the use of debate, discussion and dialogue – the "3Ds" – can be useful in macromarketing. These terms are, at times, characterized in various ways. For our purposes, they are described as follows. Debate is an oppositional approach, where two sides oppose each other in an attempt to prove each other wrong. Discussion, on the other hand, encourages participants to voice different opinions to recognize more facets of an issue. Dialogue, finally, is collaborative, where two or more sides work together toward common understanding. The goals vary from winning (debate), voicing the most perspectives (discussion), to finding common ground (dialogue). A summary is provided in Table 1.

Table 1: Classroom Communication Paradigms: 3Ds

	Debate	Discussion	Dialogue
Tag line	"Might is right"	"The noisier, the smarter"	"Connectivity for community"
Key Adjective	Oppositional	Ideational	Collaborative
Assumptions	Individuals – or teams – are autonomous and judged on intellectual might	"Equal playing field" with little attention to identity, status, and power	Identities, experiences, and differences are essential for understanding
Self-orientation	Requires investing wholeheartedly in one's side to defend it as best	The comprehensiveness of contributions is valued	Introspection and reevaluation; temporarily suspending judgments
Others-orientation	Listen to find flaws and weaknesses in other positions	Listen to insert one's own perspective and ideas	Listen to find strengths in other positions; Seek meaning and points of connection
Emotions in the process	Feelings and relationships ignored; opposition deprecated	Centered on content; emotions tolerated.	Emotions deepen understanding and relationships
Goal	Winning; a determined conclusion (usually from an outside judge)	The more perspectives voiced, the better; may be open or close-ended	Common ground; remains open-ended

Traditional debates can be beneficial, such as when structured debates – as opposed to just hosting open discussions – are used, and result in students finding it easier to talk about diverging topics (Fallahi & Haney 2007). Another strength of the debate paradigm is that students are stretched to defend their thinking against challenges. It trains students how to recognize flaws and weaknesses in different positions, including their own. However, debate has been critiqued as entrenching one's own position and feeding polarization (Hyde and Bineham 2000). Debate can also create negative interdependence, wherein one group tries to dominate other groups through, for example, hoarding information (Jacobs 2010). Because individuals invest themselves in defending a position, debates may result in the belittling of the other people involved. As the winners of a debate are often assessed on how well they have argued their position (Johnson & Johnson 1985), debate can therefore push participants to think in terms of one right answer, with distinct winners and losers.

Controversies
It is here that the framing of 'controversies' becomes important. The use of academic controversies in marketing education has been advocated by some macromarketers (Watson et al. 2022; Shapiro 2008; 2021). Controversies happen "when one person's ideas, information, conclusions, theories, or opinions are incompatible with those of another person, and the two seek to reach an agreement" (Johnson and Johnson 1979). Controversies therefore involve topics that many find important, yet involve a lack of consensus (Jacobs 2010), such as the use of non-renewable energy sources, the regulation of organic or fairly traded products, and the use single- or few-use items (e.g., fast fashion, plastic bags), among other pressing societal topics.

Controversies are often posed as compelling statements that can capture either broad theoretical topics or even very specific industry or product level issues. One such general topic is posed in this controversy statement, "All stakeholders are (not) the social responsibility of business" (Watson et al. 2022), while a more specific topic could be, "All coffee should (not) be FairTrade certified". While these topics are posed in a yes/no framing (by employing the word 'not'), other sentences could be solely positive or negative in construction. Such statements can be created by students, by marketing education materials (e.g., Pedagogy Place, textbooks, etc.), industry created (e.g., Intelligence Squared), or student-created (e.g., as a course exercise).

Controversy statements are used in a variety of ways in the marketing classroom. For example, in-class exercises can make use of controversy statements by briefly posing a question and polling students on their thoughts (e.g., "Companies are responsible for the after-market use of their products") by a show of hands or electronic poll. Another efficient approach could be to ask students to quickly brainstorm some salient aspects on the topic as a class or in pairs. Classrooms can also be split into two, asking each side to advocate for their respective side, while guest lecturers can be brought in to provide alternative perspectives. Watson et al. (2022) used online breakout rooms to have students discuss a controversy in a virtual classroom.

Exercises can also take place outside of the class, with students, either individually or in groups, being required to do a deep-dive in their respective side of the topic, or both sides at the same time, providing a report, online discussion post, and/or presentation (in-class or recorded) of what is uncovered. Other students can be asked to respond in writing or spoken word. For example, (Shapiro et al. 2021) detailed how students could engage in detailed research outside of class towards understanding the harms and benefits for stakeholders impacted by the controversies, with formal debates (e.g., group presentations followed by timed spoken rebuttals) taking place in the classroom. In another example, (Watson et al. 2022) had groups develop a 400-word written position on the topic outside of class. Groups took turns with writing either the "position" paper or a response to another group's position. Final exams can also bring in controversy statements, asking them to elaborate, defend, and explain the various 'sides' of the issue.

Benefits of using a controversy approach may include contributing to the creation of novel ideas (Johnson, Johnson, and Tjosvold 2006), encouraging research (Johnson & Johnson 1994), sharing ideas (Johnson & Johnson 1985), enhancing intrinsic motivation, prompting cooperation (Jacobs 2010), managing conflict (Tjovold 2006), increasing tolerance for ambiguity (Bunder 1962), strengthening understanding of the existence of complex problems (Watson et al. 2022),

and facilitating understanding of interconnected and conflicting stakeholder views, with potential positive implications for future workplace success (Shapiro et al. 2021). (Watson et al. 2022) articulated in the learning outcomes of the described course for students to demonstrate "the ability to discuss broader social controversies" and "ability to understand different perspectives of a controversy" (p. 377).

The 3Ds of Controversies
At first glance, it appears that the use of controversy statements lends itself to align with the 'D' of debate, wherein students can defend an assigned or chosen position on a controversy statement (Shapiro et al. 2021). However, looking to the literature, the academic controversy approach uses controversies in a way that goes beyond debate (e.g., Johnson et al. 1996). The beginning of such an approach is focused on understanding the opposing views of the topic, perhaps through discussion and even structured debate. However, an academic controversy approach requires the students to actively work towards a 'common' position towards addressing the issues; if no such consensus is possible, a next best outcome (e.g., presenting the different views/solutions) is called for (Jacob 2010). Such an approach encourages students, as they receive new ideas and thoughts, to change their position over the duration of the process (Johnson & Johnson 1985). While there is an intentional two-sided opposition created in the positioning of the controversy statements, the aim is nonetheless that of moving towards mutual understanding, aligning itself more with dialogue.

When encouraging students to come to a consensus, a controversy-based approach in the classroom overcomes the above critiques of traditional debates. As opposed to the traditional debate approach, the controversies approach was found to increase information search, support peer sharing of information, encourage changing of viewpoints, and improve the involvement of otherwise excluded group members (Johnson & Johnson 1985). Likewise, when discussing the 3Ds, Hyde and Bineham (2000) advocate the movement from debate to dialogue. "Dialogue is non-polarized discourse. Its dynamic is not oppositional, but collaborative. Its proposed outcome is not the ascendance of one perspective over another, but the fusion of all perspectives to enable a larger, more inclusive view, one which allows the tension of disagreement" (Hyde and Bineham 2000). In other words, seeking towards achieving a holistic 'meeting of the minds' is a goal.

A Suggested Way Forward
Opportunities with 3Ds and Controversies
From the above, it could be inferred that we are advocating to throw out discussion and debate, towards fostering dialogue. However, this would be short-sighted since each of the 3Ds – and their employment in controversies – can serve important roles, if used purposefully.

In fact, this leads to the question of which of these paradigms, under which circumstances, will best serve the macromarketer educator. Variety in techniques can engage students in different ways. *Discussion* is a starting point for getting students thinking about the different facets of an issue, drawing on their personal experiences and knowledge. On especially sensitive topics, *dialogue* can be vital, where students can work together to a holistic shared understanding. On other less sensitive public policy issues, a *debate* approach might prepare students for opposition in the public arena, as students practice defending different positions. Similarly, all three aspects

are likely needed to effectively move the students through an academic controversy process, from the initial *discussions*, to the *debate* of either sides, towards the ultimate goal of coming to a shared – although not always completely aligned – *dialogue* and assessment of the issues and potential solutions.

While some instructors "avoid discussions of controversial issues in their classrooms altogether for fear of alienating students and discouraging shy or less verbal students" (Fallahi & Haney, 2007, p. 83), we feel this would be a missed opportunity. Using live online brainstorm tools and Post-It notes, even anonymously, allows for a way for students to share their voice. Students can also be encouraged to present their viewpoints in unique ways that go beyond just speaking to include aspects such as roleplays, songs, visuals (Cohen 1994), written submissions, and videos (Watson et al. 2022).

Towards successfully employing a controversy-based approach, Jacobs (2010) argued that such a process is best served by creating heterogenous groups, where instructors can encourage balanced student involvement through, for example, setting time limits on contributions (e.g., a clock or the speaker holding a particular object), asking students to prepare something written or visual (e.g., a mind map) in advance, encouraging group bonding (e.g., using a team name, motto, or cheer), and allowing students to choose their own topic. Engendering *dialogue* over *debate*, and therefore the related skills of problem recognition, can be fostered more directly when topics are personally relevant to the students, such as posing controversies around online surveillance related to undergraduate's use of social media on their mobile phones (Watson et al. 2022).

A Practical Example
To provide a more detailed example of how each of the 3Ds can influence the value of an academic controversy approach, we share here an approach that includes the United Nations' Sustainable Development Goals. Specifically, since SDG #12 ("Responsible Consumption & Production") offers fertile grounds for seeing complexities associated with marketing systems, we use that as the basis for developing students' critical thinking skills in a marketing course. The steps involved are the following:

(1) SDG #12 is *discussed* in general terms during class, with students brainstorming on specific issues (e.g. food waste, as encompassed in target 12.3) and using stakeholder mapping.
(2) Students then can generate their own *controversy statements* (amplifying student commitment to and interest in the statements) around key issues that comes up in the discussion. The class then votes on which statement they wish to use for subsequent analysis.
(3) Students then self-select onto a 'side' of the chosen controversy statement, moving into groups organized by that self-selection. However, in a "bait and switch" moment, they are instead assigned to the opposite side of the controversy. This facilitates their ability to appreciate both sides as a result.
(4) A formal *debate* is then scheduled for a later class period, with each group presenting their "side" via 3-4 strong contentions. However, instead of (or in addition to) asking each side to simply rebut the arguments of the other side, as in a traditional debate, they

are tasked with finding sufficient arguments and evidence to bolster the 3-4 contentions of the *other* side.

(5) Equipped in this way with elaborated contentions for a side that they did not choose to support initially, the students can then be brought into a collaborative *dialogue* and asked to find 3-4 appropriate solutions to the issue at hand.

This scaffolded approach to the 3Ds – *discussion*, then *debate*, followed by *dialogue* – in the context of academic controversies can be applied for other topics besides the UN SDGs and in a wide variety of marketing courses, with appropriate adjustments for contexts. What is key is that students recognize their own power in developing solutions that purposefully incorporate a variety of views and an appreciation of the issue at hand.

Conclusions

While there are many ways to engage students in complex macromarketing issues, pedagogical tools which enhance their ability to consider multiple perspectives and utilize them to identify a range of possible actions will provide lasting value. Not only are such tools helpful for illustrating to students how markets frequently present these challenges, but they equip students to be the critical thinkers that employers and governments are seeking. As educators, we have the responsibility to foster the development of these skills as often as practical, and the 3Ds and controversies approach offers options to consider.

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A New Approach to "Book Learning"?

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Introduction

"The Day the World Stops Shopping". That book title called out from the shelf and the book itself was soon in my hands. But that was only to be expected, wasn't it given that I was an emeritus professor of marketing, one who had also been a member of the macromarketing clan for over for over forty years?

MacKinnon's (2021) book focuses on how the push for more consumption as a contributor to economic success uses planetary resources at a rate than cannot be sustained over time. He argues that if the entire world consumed as those in the US do, we would need five planets to support our consumption. In his "thought experiment", he considers what sustainable consumption would entail, what changes to society and human interaction would occur, and what forces stand in the way.

With that, two possible uses of the volume, other than the self learning any reader experiences, immediately came to mind. First, this seems like a book that I might review for the *Journal of Macromarketing* if in fact it proves to be as relevant as both its title and its subtitle "How ending consumerism gives us a better life and a greener world" suggested. Also, and at least equally attractive to me, was the possibility of using books like this, in whole or in part, as another way of "hacking" an Introductory Marketing course with both sustainability and macromarketing, an approach very different from that laid out in a recent *Journal of Marketing Education* article (Watson et al. 2022).

Some months and two careful readings later, I concluded that, while a more or less traditional macromarketing focused review could be written, a different approach might prove far more useful. And, yes, this book could be used to hack either a Marketing Principles or second level Marketing Management course but not in the way I originally had in mind--assigning selected chapters throughout the semester. Rather, and as I will try to show below, a much more time efficient approach would involve devoting time to having students read, listen to and/or watch a variety of already available online material subsequently generated by the publication. This material includes written reviews, freely available short excerpts from the book, related commentary subsequently written by the author, J.C. MacKinnon, podcasts in which MacKinnon had participated and You Tube recordings of his book-related presentations that one finds online and available to all concerned.

External Materials

After having screened all that material, or at least all that Google made available to me, I have the following recommendations as to what students might be assigned by instructors wishing to experiment with this approach.

Book Reviews: There are many ways to categorize book reviews but, for present purposes, let's make a distinction between those that primarily summarize (Number 1 below); those that tend to evaluate as well as summarize (Number 2); and those whose authors, while reviewing, tend to draw on other sources as well (Number3). The latter are ones I tend to call "launching pad" reviews. Each has merit to be assigned to students, and most are relatively brief.

> 1. Consumed by Ink," The Day the World Stops Shopping" by J.B Mackinnon. October 4, 2021
> https://consumedbyink.ca/2021/10/04/the-day-the-world-stops-shopping-by-j-b-mackinnon/
>
> 2. Jamie Waters, "Overconsumption and the Environment; Should we all stop shopping?" *The Guardian*, May 30, 2021
> https://www.theguardian.com/lifeandstyle/2021/may/30/should-we-all-stop-shopping-how-to-end-overconsumption
>
> 3. Brian Harvey, "1247 The Less the Merrier", *The British Columbia Review*, October 12, 2021
> https://thebcreview.ca/2021/10/12/1247-harvey-mackinnon-shopping/

Book Extracts: There are two focused extracts from the book available online and I recommend both be assigned. These extracts allow students to get a feel for the approach taken in the book, and for the author's writing style, one that has earned him numerous awards. Apart from their usefulness in terms of content, they may also spark student interest in reading the full book at a later time.

> 4. J.B. Mackinnon. "We need to get used to the night again", C*anadian Geograp*hic Online, May 18, 2021.
> https://canadiangeographic.ca/articles/excerpt-the-day-the-world-stops-shopping/
>
> 5. J.B. MacKinnon, "What Would Happen if the World Stopped Shopping (An excerpt on Fast Fashion), *Fast Company*, May 28, 2021
> https://www.fastcompany.com/90640964/what-would-happen-if-the-world-stopped-shopping

Subsequently written Author Comments: After publication, Mackinnon wrote two short columns that linked his book, in large part completed before the Covid pandemic, with both what happened to shopping during that pandemic and what he believed would follow. Once again, I recommend both be assigned.

> 6. J. B. Mackinnon, "Could Covid-19 Force Us to Confront our Consumption Problem? ", ZOCALO, June 20, 2021
> https://www.zocalopublicsquare.org/2021/06/28/could-covid-19-force-us-confront-consumption-problem/ideas/essay/

7. J. B. Mackinnon, "We are ready to spend again, but there are profound costs to consumption" The Globe and Mail, May 14, 2021
https://www.theglobeandmail.com/opinion/article-were-ready-to-spend-again-but-there-are-profound-costs-to-consumption/

You Tube Videos: Somewhat surprising, at least to me, was the fact I found eleven You Tube recordings in which Mackinnon discusses his book. Since the ones selected (below) each run about an hour, I suggest only one be assigned. The first is quite closely text related with the host quite effectively marching Mackinnon through the volume. The other two both assume a degree of text awareness and both also involve a second guest participant. For example, the one recorded at The Cambridge Forum includes a senior executive from Patagonia, a firm widely recognized for its outstanding environmental behavior. The other, recorded at the Vancouver Public Library, has as a host participant Tsiporah Berman, a well known Canadian environmental author and activist in her own right.

8. Kansas City Public Library, "The Day the World Stops Shopping" You Tube, July 22, 2021
https://www.youtube.com/watch?v=AKtlB365FPU

9. The Cambridge Forum, "The Day the World Stops Shopping", You Tube, December 13, 2021
https://www.youtube.com/watch?v=QLt5qhQauRk

10. Vancouver Public Library, "The Day the World Stops Shopping" (On You Tube but as a Zoomed presentation) May 18, 2021.
https://www.youtube.com/watch?v=Mqri_6OA038

The Question
While the use of non-textbook materials – articles, videos, targeted websites – is not a novel pedagogical tool, what is proposed here is that the coordinated use of materials related to one text, each offering a piece of the larger "whole", may offer a more effective learning opportunity than if the entire book were assigned as a reading. There is, certainly, an element of time efficiency which may carry both benefits and losses. Would reading the entire volume lead to better learning? Would instead this "bits and pieces" approach prove more effective given the "from early childhood" Internet exposure of today's students? This seems worth implementing to see.

One Approach to Using These Materials
It was decided to incorporate the "bits and pieces" approach into a fourth-year undergraduate marketing course entitled "Sustainability in Marketing" taught at a large state university. Up to now, the course has been supported with two required readings: the Belz and Peattie (2012) textbook which is not anticipated to be further updated, and Humes (2012) *Garbology: Our Dirty Love Affair with Trash*, a popular press book that carefully distinguishes between waste and trash. As both books have become somewhat dated, the course has also relied on student-led updates of socio-ecological problems, an in-depth coverage and reflection on the United Nations' Sustainable Development Goals, and student analysis of current company strategies.

For the incorporation of the MacKinnon materials, it was decided to structure the course slightly differently. Two key assignments have been introduced:

1. The external materials detailed above were infused into a series of written reflections and linked directly to a repeated task to respond to the question "What is sustainable consumption?"
2. To enhance the relevance of these lessons, a multi-part small-team "Consumption Choices" assignment requires students to challenge current US consumption patterns, taking note of the many options available for a particular consumption goal, a comparison to (a) the US past and (b) a "one planet" country like Ecuador, and a considered analysis for how US consumption "should" look in the future.

These new assignments are spread across the 15 weeks of the course, and are interspersed with other normal class discussions and assignments. Table 1 summarizes the plan.

Table 1: Weekly Plan

Week 1	Students are asked to **record a brief video** of themselves responding to the question "What is sustainable consumption?" They are told to not research it, and instead to simply record what it means to them. These videos last typically less than one minute.
Week 2	The first set of materials – the **Book Reviews** listed above – are assigned to the students for reading, along with a **discussion board** on which they must respond to this prompt: "What consumption behavior in your own life may be a particularly good example of something that has 'excessive' impact on the planet or society? Why do you pursue this behavior -- is it the influence of family or friends or your own choices? Why? In your response, be sure to refer to specific points raised in one or more of the reviews." This discussion board (with responses to other students) is due early in week 2, such that only our introductory week of material may contribute to their responses outside of the MacKinnon reviews. During week 2, we talk in more detail about socio-ecological problems in the world, framing business and consumption choices as contributors. Subsequently, at the end of week 2, students are assigned to watch any one of the **YouTube videos** listed earlier, and begin to build a **formal written response** to the question "What is Sustainable Consumption?" They are permitted to use external sources but must create their own wording, and reflect on the video's lessons. They are also asked to contrast their new answer to the one previously

	provided in their introductory video, taking note of what they understand differently at this point.
Week 3	This week is devoted to covering the UN SDGs in detail, allowing additional in-class discussion of the types of strategic and behavioral changes that are needed to achieve sustainable development.
Week 4	As a class, we discuss what "sustainable consumption behavior" generally has meant in the US and western countries. We then use the two **Book Extracts** on electricity consumption and fast fashion choices to explore our everyday assumptions further. On a **discussion board**, they respond to this prompt: "What other examples of modern consumption choices do you think fit the examples that MacKinnon provides? How and why? Provide details."
Week 5	Students present to one another on their selected socio-ecological challenge, and the class discusses the individual v. system-wide changes required to meet any of them. This directly responds to the **MacKinnon message** that individuals acting alone cannot bring about sufficient change; institutional/system change is needed as well. Students also complete a **second revision** of their "What is sustainable consumption?" response, expected now to be expanded and more specific in details.
Week 6	In teams of two, students begin the multi-part "consumption choices" assignment to analyze how US-based behaviors (**that would require 5 planets equivalent for the world to sustain**) are unsustainable. In phase 1, they **pick a common behavior from a list provided** (e.g. have cake for a birthday party, clean one's home, etc.) and begin building a thorough treatment of current consumer options. They must provide updated market information as well as reflect on socio-ecological negatives associated with each option.
Week 7	Class lecture material turns to firm sustainability objectives, and focuses on mission statements, indirect values for natural resources, building an inside-out perspective, and corporate sustainability leadership as it stands today. After weeks of student journaling on consumption, resource use & waste behaviors in their daily lives, they now identify at least one of their regular behaviors to improve significantly over the coming month. This ties directly into **MacKinnon's themes** of our mindless consumption patterns.
Week 8	During the week, we openly discuss what students have found on their **consumption choice topic**, looking for commonalities in terms of wastefulness and planetary impacts across different behaviors. Their **written reflection** focuses on synthesizing these lessons.
Week 9	Calendar week 9 is Spring break – no classes
Week 10	Class lecture material turns to the strategic options that firms consider regarding sustainability, and the micro & macro environment factors which either impede or

	further firm goals. This offers a framework for considering how consumption choices are shaped by more than habit, more than firms themselves, but by the system in which all operate.
Week 11	In the **consumption choice analysis** assignment, the teams look for counter-examples to what they observe in our consumption. Specifically, they must research (1) the corollary behaviors from 50 to 100 years ago in the United States, and (2) the <u>current</u> corollary behaviors in a country like Ecuador with its lower planetary impacts. As they describe the two counter-examples, they must reflect on the tools, knowledge and expectations associated with that consumption.
Week 12	In weeks 11 to 14, we discuss one alternative to the standard 4P's teaching of the principles of marketing, using the 4C's. In week 11, <u>C</u>ustomer Solutions topic (v. Product) ties in neatly to the consumption choice analysis assignment and **MacKinnon's work**. In week 12, the focus is on <u>C</u>ommunication (v. Promotion). We incorporate **MacKinnon's message** here as well, asking about the role that advertising plays in promoting over-consumption. We contrast the messaging of companies like Patagonia with others who promote product obsolescence (either true or fictional).
Week 13	In week 13, the Customer <u>C</u>ost (v. Price) topic addresses search & acquisition costs, usage costs as well as disposal, and helps to further **MacKinnon's message** regarding the mindless consumption habits we share. In week 14, we discuss <u>C</u>onvenience (v. Place), including ease of purchase but also how goods make our lives easier in their "convenient" form. The importance of convenience in the modern lifestyle is a major factor to the over-consumption that **MacKinnon's message** conveys.
Week 14	In the **consumption choice analysis** assignment, the teams begin to build their forward view of what consumption can/should look like in 50 years if the system were to adjust. What new learning would be prioritized? What tools would we use (and not use)? What priorities would emerge over existing ones? How would wastefulness be avoided? How do we get to **MacKinnon's "buy less – buy better"**? Which specific company or companies do the teams relate this to, at least among current market participants? We discuss their topics in class to help set objectives clearly.
Week 15	Now with course lessons, socio-ecological issue presentations, and on-going discussions related to consumption choices in hand, the students return to the original question: "What is Sustainable Consumption?" with a **formal written analysis**. Their responses now must be elaborated more fully and must include each of the following: 1. Direct reflection of course lessons, in terms of competing influences over firm and consumer choices, and in terms of UN SDGs and governmental efforts to reach them. 2. Reflection on how their view of sustainable consumption may influence their own career paths, including how the *status quo* of an employer may

	challenge even an ardent sustainability advocate to bring about change, and what small and large steps a new employee can take to seek that change. 3. A detailed reflection on how the US household – with their own as a guide – must endeavor to make changes that contribute to sustainability, and what circumstances hinder or help achieve those goals. A minimum of 5 distinct changes that could/should be made for their own households must be proposed, with influencing factors identified clearly.
Week 16	As we finish the semester, students present formally to one another what they've learned in their **Consumption Choices** analysis. The focus is what individual and systemic changes would be needed to reduce US consumption patterns from the 5-planet resource level. This includes roles for government, technology change, labeling and pricing adjustments, and other factors. The discussion is open and collegial as what one team identifies may aptly fit the topic of another, and the broader implications become apparent for how certain changes can be truly impactful.

Lessons and Outcomes

One outcome of this approach to infusing a discussion of sustainable consumption throughout the course became evident quickly: the students read or viewed the materials provided. In contrast, Humes' (2013) *Garbology* text has been incorporated into the course for several years, and yet is systematically underutilized by students. This is despite regular encouragement to read a few chapters here and there in what is an agreeable popular press book about the same length as MacKinnon's book. Thus, there is a clear indication that the "bits and pieces" approach may indeed foster greater engagement with the material.

Beyond this, the goal was to have these materials adequately move student critical thinking skills from a place of little knowledge to one where they saw the complexities and challenges of reaching what should be more clearly and meaningfully defined goals. This is quite evident in their responses to the "What is Sustainable Consumption?" prompt. For instance, in the initial video recording of their pre-semester idea of what sustainable consumption is, several indicated that they were uncertain, and those that seemed more confident largely lumped all relevant criteria under "environmental" effects. These recordings averaged about 37 seconds in length with some of that time dedicated to introducing themselves.

As we progressed through the course, their responses became more clearly stated as well as broader in scope. In week 2, with the benefit of the MacKinnon-related YouTube videos and book reviews, the students move from either pure guessing to a clear, accurate statement, or a generally correct idea to one where they now elaborate on with confidence and examples. By week 5, after we have covered the UN's Sustainable Development Goals, considered the MacKinnon book extracts, and had some depth discussions on socio-ecological problems in the world, their 3rd response to the "What is Sustainable Consumption?" question begins to *assign responsibility* to consumers and businesses, with clear examples of how that would have to look. Finally, in the week 15 response, they have developed a stronger sense of the connections

between consumers' choices, business decisions, and socio-ecological considerations that they can articulate the issue in a more "*macro*" way. While not all wrote about government regulations in their final responses, this became a recurring theme in other assignments and in-class discussions, further suggesting that they see the need for *system* changes as well.

Conclusions

Our experiment with using book reviews, author commentaries, YouTube videos, and book extracts in lieu of requiring a full-text reading is not scientific, but nonetheless suggests that student engagement in important and complex subjects can be quickly and meaningfully increased with their use. During this same semester, the aforementioned *Garbology* text continued to be assigned, yet students did not open the book, and were unprepared for discussions about it. This distinction is quite striking to experience.

In terms of learning, the use of these varied materials in the context of students responding more than once to the *same* question also demonstrated that they could advance and broaden their thinking on the subject with relatively limited 'gems' of information and analysis. While other assignments and in-class discussion surely contributed to that improvement, the deepest changes in student responses to the posed question occurred earliest in the semester when the MacKinnon materials were assigned. In our view, this strongly suggests that use of alternative media – whether in addition to or perhaps in lieu of traditional texts – may be of particular value for student learning.

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Autoethnography as Pedagogy to Understand Marginalized Prosumers

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The purpose of this paper is to explore how autoethnography (Adams, Ellis, and Jones 2021; Adams, Ellis, and Bochner 2011) can be used as a pedagogical tool for students from elite management institutes in India, who are unable to relate with the life experiences of poor prosumers. It is expected that it could engender innovative thinking where budding managers are sensitised for issues concerning majority of the population which skew marketing systems (e.g. Chakraborty, Jagadale, and Kadirov 2018; Jagadale and Roy Chaudhuri 2021) and start contemplating solutions for wicked problems (e.g. poverty, inequality, etc.) (Kennedy 2016) in their society.

Sustainable Development Goal 1 calls for an end to poverty in all its forms by 2030. It aims to ensure social protection for the poor and vulnerable and increase their access to essential services (Sustainable Development Goals 2023). India assumes a vital position in the global fight against poverty as it is widespread in India, with low median income and globally the highest number of poor. It would be worthwhile to mention that there is also a substantial population that is just above poverty line and vulnerable to falling into the poverty trap (Nitnaware 2022). Moreover, the recent pandemic has aggravated the challenge by erasing four years of poverty eradication work (Sustainable Development Goals 2023). Thus, almost any Indian has had experiences of poverty either through own experiences, or through widespread day-to-day interactions with the omnipresent poor.

Issues about poverty and hunger cannot be considered peripheral to the academic discourse. These are system level issues that define and structure marketing systems and add to the 'market complexities' (Andrus, Hunt, and Redford 2015). Poverty, besides denying choices and opportunities to individuals, de-dignify prosumers thus, negatively impacting marketing system outcomes (Layton 2009; Roy Chaudhuri and Jagadale 2021). It strips individuals of their essential capability to meaningfully participate in marketing systems (Jagadale, Kadirov, and Chakraborty 2018). Consequently, poor individuals, families, and communities become vulnerable to systemic viciousness and remain marginal without rightful opportunities to better their well-being (e.g., Chakraborty, Jagadale, and Kadirov 2018; Belk, Varman, and Vikas 2015).

The critical question for macromarketers here is whether marketing education can afford to ignore or treat this issue as a secondary dyadic issue which essentially affects billions of people worldwide. Marketing and poverty have intricated systemic links where marketing education can play a crucial role in achieving a better quality of life for billions below poverty line (Shapiro et al. 2021). Thus, it is prudent that budding (elite!) managers are made aware and taught about poverty and its' various aspects as an integral part of marketing systems where they can be committed to these pressing issues. Hence, it becomes imperative for macromarketing academics to bring poverty and related issues from the margins of curricula to the core.

Against this backdrop, teachings and curricula in Indian business schools assume greater importance. In reality, the presumed value neutrality of management education leads to accepting skewed realities and naturalized desubjectification (lack of agency) of poor prosumers. Although globally, business schools have begun to address poverty issues in their teaching and learning, and curricula have become inclusive, Indian B-schools are far away from systemically addressing these issues (e.g., Ojha 2017). The author's experience with these schools suggests that they do not (except for some isolated efforts) 'foster alternatives'. Unfortunately, these schools advance only select agendas by ignoring poverty's impact on the markets, businesses, and marketing systems.

Indian Institutes of Management (IIM)- Indian government, with the help of American universities, established the first two of its current 20 IIMs at Ahmedabad and Calcutta, respectively. It helped structure the Indian management education, which has been, ever since, producing an elite managerial cadre to serve corporations. Remarkably, teaching material and pedagogy both were imported from the American universities (Varman 2014) without giving much thought to the country's hitherto prevailing and embedded issues, like poverty, inequality and hunger. The only social reference for overall management education in India was western universities (Varman 2014; Vijay and Nair 2021). Yet, IIMs are aspirational institutes for the lower and middle classes, and have been vehicles of social mobility for many, hitherto, relatively not well-off population. Admission to these institutes happens through Common Admissions Tests (CAT), which is touted as one of the most challenging admission tests in the country and globally. Students are tested for their quantitative skills, logical reasoning abilities, and, most notably, their English language skills. Thus, it would be safe to say that this test is essentially designed for students from Engineering and English-educated backgrounds, excluding students studying in vernacular (native) languages and other educational streams (Mitra 2020). Unfortunately, it ensures sociocultural homogeneity in incoming classes excluding diverse narratives and life experiences.

The socio-economically homogenous student group remains oblivious to the realities of the marginalized and the epistemologies to understand it, consequently narrowing the ontological boundaries. Also, the experiences with poverty are side-lined through curricula of IIMs which almost completely wipe out the local contexts. We attempted to reverse it in the classroom. However, existing pedagogies (like discussions, case studies, and field visits) remain limited, particularly in, yielding desired results of connecting students to the multiple realities of the marginalised prosumers.

We mainly faced the issues in our Rural & Inclusive Marketing (RIM) course. Rural comprise 65% of India's population, mostly involved in agriculture and related activities (World Bank 2022). The course seeks to introduce participants to rural markets and underline the importance of rural prosumers. Rural markets in India considerably differ from urban markets regarding consumers (low purchasing power), channels, and media. Therefore, budding managers are required to be sensitized to the needs of these markets. There were 68 registered students in a course. The author has redesigned the course from corporations selling their products and services in rural to empowering rural and marginalized producers using various alternate aggregation systems. However, due to students' limited and often lop-sided understanding of rural India, we face significant challenges like the narratives of Us and Them, poverty being a

unique phenomenon aggravated due to suboptimal choices of poor, inability to comprehend the role of institutions, etc.

To address these challenges, authors put/advocate autoethnography as a potent pedagogical tool (Denzin 2013; Sharon 2022) based on their experience of using it in these culturally homogenous classrooms. It is put forward as a research-based reflective self-study that enables participants (students) to develop awareness about 'them' through/by understanding 'self' vis-à-vis culturally distant 'them.'

"Autoethnography" consists of three characteristics or activities: the "auto," or self; the "ethno," or culture; and the "graphy," or representation/writing/ story (Adams, Ellis, and Jones 2021). Autoethnography is "an approach to research and writing that seeks to describe and systematically analyze (graphy) personal experiences (auto) to understand cultural experiences (ethno)" (Adams, Bochner, and Ellis 2011). This approach can enable students to self-reflect to begin understanding the taken-for-granted cultural and socio-economic phenomenon. It helps develop students' awareness about the "social hidden"- its multiple layers and underneath complexities. It assumes larger importance on the backdrop of the cultural domination of the Western mass-media, language, methods and consumption paradigms.

As the first step towards employing this pedagogical tool, 'educator autoethnography' is offered as a potential application of this strategy in a classroom. Secondly, the students in the authors' RIM classes were asked to reflect on their experience in rural, and with poor and marginalized communities. We also encouraged students to engage proactively with their service providers like sweepers, domestic helpers, etc. By engaging with self-reflections in the classroom, educators and students explored links between poverty and markets. This method also created a democratic and collaborative educational environment where learning happened through ones lived experience.

This work in progress will draw on data assemblage consisting of authors' experience as instructor-auto-ethnographer, students' accounts of their stories and their reflections on this method. Through this, we attempt to create images of poor prosumers in the Indian context, beyond students' current imageries and imagination. We, based on the data mentioned above, thematically develop some aspects and questions that can be advanced as crucial success factors of this pedagogical approach, viz,

- Changing narratives from Them to, Us and Them;
- Diluting narratives between Us versus Them;
- Challenges are more pressing and urgent;
- Institutional factors and not individual (irrational) decisions create poverty traps;
- Compassion is needed to understand the space between Us and Them;
- Cooperative ethos (thus, partnerships) required to develop solutions;
- Will social justice ever be achieved through marketing, ever?

These themes will stimulate approaches for students to understand poor prosumers in a better way than they would otherwise be understood. This paper will finally outline how

autoethnography can be applied as a methodology to systemically unlock the life stories of poor prosumers that have been hitherto excluded in premier management institutes in India.

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ChatGPT in the Marketing Classroom: Friend or Foe?

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Introduction

Artificial intelligence (AI), broadly understood as an attempt to simulate humans (e.g., de Kleijn et al. 2017; Lieto et al. 2018), is increasingly being employed in—and impacting—many areas of society. Education is no exception. Recently, a new AI application called ChatGPT reignited the discussion on how an AI-driven future will look like (e.g., Galloway 2023). Created by American startup OpenAI, ChatGPT (short for "Chat Generative Pre-trained Transformer") is an internet-based experimental chatbot application to process natural language. ChatGPT provides a detailed response in dialogue form to user input. It does this by drawing on a variety of sources, crafting an argument, and outputting a usually well-written response. ChatGPT has already been used for a variety of purposes, such as "generating poems, songs, and TV scripts, to answering trivia questions and writing and debugging lines of code" (Vincent 2022).

Accessing the service is easy. All that is required is an internet connection, an email account, and verification with a phone number. So far, the application, which is still in an experimental phase, can be used free of charge. Since its launch on November 30, 2023, uptake of ChatGPT has been impressive. Over one million people tried it out in its first week alone (Stokel-Walker 2022). More recently, the website has seen intermittent outages due to the high demand. For example, on January 11, 2023, visitors to the website were greeted with the message that "ChatGPT is at capacity right now" (Chat.OpenAI.com 2023). Moreover, tech giant Microsoft announced in mid-January that it will invest $10 billion in OpenAI, resulting in a valuation of OpenAI at $29 billion (Browne 2023).

Given the increasing importance artificial intelligence plays in business, and society more broadly (e.g., data-driven decision making, automation, etc.), we argue that ChatGPT creates an opportunity to advance the notion of "AI literacy" in the classroom, which we suggest should be of particular importance macromarketers. We begin by reviewing initial responses from educators to ChatGPT, prior to turning our attention to how it can potentially drive "AI literacy."

ChatGPT and Education

Given its impressive capabilities, educators and students alike immediately grasped the potential of such an application. The first reaction was largely that this application could be used to support—or complete—classroom assignments. This is not limited to assignments requiring a written response but could also include actions such as preparing arguments for discussions and debates, asking ChatGPT for answers to factual questions, and have ChatGPT write scripts for presentations, among other applications. As with many new technologies, ChatGPT's potential provides downsides, as well as upsides, discussed below.

Potential Downsides

ChatGPT can be used as a way for students to bypass doing classroom assignments themselves and to rely on an AI-generated response instead. As we look towards the marketing classroom specifically, many instructors are still using written responses, discussions, and debates as part of their assessments that ChatGPT could write instead. In the words of a recent article in Nature, "some academics are calling the bot the death knell for conventional forms of educational assessment" (Stokel-Walker 2022). The media, academic groups, and department meetings are awash in discussions around how students will—and are—using ChatGPT to complete assignments and passing it off as their own efforts.

While some argue that ChatGPT is yet another alternative to students accessing essays written by other humans at passing it off as their own (Stokel-Walker 2022), the ease of which ChatGPT can be used may tempt a hight number of students to use it in their education. After all, it can provide a reliably coherent and, arguably, well-written response. To provide further insights into the potential of ChatGPT, consider the following concrete example of an interaction with ChatGPT. In December 2022, we asked ChatGPT, "How does ChatGPT contribute to student plagiarism and what can teachers do about it?" and the response—which took mere seconds—was as follows,

> "Like any technology, ChatGPT (short for "Chat Generative Pre-trained Transformer") can be misused in research if it is not used ethically or responsibly. ChatGPT is a language model that was trained on a large dataset of human conversation and is capable of generating human-like text when given a prompt. It is a powerful tool that can be used to generate realistic-sounding text, but it is important to remember that it is not a real person and its responses are not always accurate or appropriate."

ChatGPT's response went on to detail that its services could be used for plagiarism if not cited appropriately. Additionally, ChatGPT wrote that it could provide misleading, and false information, given its response are "generated based on patterns it has learned from the data it was trained on," where data itself can be rife with inaccuracies or "misrepresentation of people's beliefs, opinions, or behaviors." Indeed, many are concerned about the accuracy of the 'facts' provided by the application, even while it presents the results in a plausible way (Vincent 2022), where the application has been found to provide wrong answers to even simple mathematical questions. Additionally, the data can be outdated, limiting its applicably to current events, as ChatGPT is trained on a data set unconnected to the Internet; this data set comes from September 2021 (Gao et al. 2022).

The responses to these downsides of ChatGPT have been variable. In its own response, ChatGPT emphasised the importance of (a) using the application "responsibly and ethically," (b) not to rely on it entirely, and (c) not using it to deceive others. Moreover, the company who created ChatGPT suggested that users should check the accuracy of what ChatGPT produces (Hurst 2022). While such a suggestion is well-meaning, it relies on the user to use and manage this service responsibly.

Others have gone further than relying on students to behave appropriately. For example, educational institutions have already banned access to the application on their devices (e.g., the New York City education department) (Bowman 2023), while other platforms (e.g, StackOverflow) are following suit (Vincent 2022). Guidelines are also emerging from business schools to manage for academic integrity and plagiarism. At the instructor level, anecdotally, some instructors have mentioned their plan to switch their assessments from written ones to alternatives such as asking students to prepare video reports, poster boards, and image-based outputs, such as creating advertisements or the like (noting that other AI platforms can already be used to generate videos and visual content). In contrast, other instructors remain confident of their ability to spot such plagiarism, especially given the reportedly false information provided by such platforms. While such suggestions to combat ChatGPT are not without their merits, it falls significantly short of a concrete solution. Arguably, for example, students could use ChatGPT as an input for even alternative assessments, given that ChatGPT can produce TV scripts and other creative outputs.

Technological solutions to the problems posted by ChatGPT are also emerging. Towards providing a more comprehensive solution to misuse of such AI applications, a 22-year-old computer science student, Edward Tian, decided to design his own app, GPTZero in early January 2023. His app can, with increasingly reliability, identify whether text was written by the AI—such as ChatGPT—or by a human, where the technology is based on two components, namely perplexity and burstiness. The former is a about complexity, where humans tend to write more complex text, while the latter is focused on variety, where humans tend to write in a less uniform way, allowing for their identification (Bowman 2023).

While this emerging solution is a promising one for instructors who aim to combat AI-generated plagiarism, one can quickly imagine how, in turn, ChatGPT could be improved to provide sentences that are more perplexing and have more variability, thereby lowering the effectiveness of such a solution. Plagiarism software packages are updating their offerings to identify and account for AI generated content, but the application is not (yet) integrated into current electronic plagiarism checkers, such as Turnitin, and thus creates an extra burden on instructors to have to input the text into this additional software offering.

More concerningly, detectors are not infallible. A late 2022 study by Gao et al. (still in preprint and not yet peer reviewed) found that identifying AI-creations remains difficult. The researchers asked ChatGPT to write scientific abstracts given "only a title and journal" where it generated "a superficially readable abstract, with accurate themes and topic-specific patient cohort sizes" (p. 8). They found that a plagiarism checker failed to capture anything amiss with the 'fake' abstracts. Even blinded human reviewers only identified 68% of the AI-generated abstracts (as well as identifying 14% of genuine abstracts as being AI-created). The AI output detector (an older version called GPT-2 Output Detector) didn't do much better, where it only identified 66% as having a high probability of being AI-generated (Gao et al. 2022). Taken together, the study indicates that ChatGPT can write plausible abstracts, with concerns that ChatGPT "could be used to entirely falsify research," or, more positively, could "be used in conjunction with a researcher's own scientific knowledge as a tool to decrease the burden of writing and formatting" (Gao et al. 2022). Nonetheless, they recommend that abstracts for both journals and conferences

be run through detectors as standard (Gao et al. 2022), something that can be done for college essays as well, with limitations.

Despite these movements to detect and even ban the use of such applications, it is important to note that ChatGPT and the like might provide a way to enrich education, rather than only detracting from it. We are concerned that by focusing on the practical consequence of ChatGPT and similar technologies, educators miss an opportunity to assess their potential long-term consequences. Concerns around ChatGPT challenging the status quo of assessing student work, or potential benefits—the upsides—to support group discussions are short-term implications. While important, we must be cautious that they do not become the focus of our attention. Thus, in what follows we discuss potential upsides and the potential of AI to positively impact education.

Potential Upsides
Proponents argue that this technology offers an alternative way to learn and potentially be harnesses to support classroom learning. Our goal as educators is to support students to become critical thinkers (Galloway 2023). ChatGPT may be able to support this by, for example, "act[ing] almost as a collaborator off which users can bounce ideas" (Stokel-Walker 2022) and provide answers to queries across a huge range of topics. Indeed, rather than hunting down disparage sources, ChatGPT offers a handy and quick shortcut to provide a clear and concise summary of a general topic.

To illustrate this potential upside, consider the following two examples of how ChatGPT could be used by instructors. In the first example, a co-author asked ChatGPT to design an assessment rubric for a sustainable marketing plan assignment in January 2023. The output included a specific example of a rubric, with clear weights assigned to different aspects (e.g., goals and objectives, positioning and messaging, strategy, and tactics, etc.), as well as specific objectives of each aspect. Similarly, the colleague of another co-author explored ChatGPT by asking it to summarise current state of the art of setting up a post-experience management programme. In both examples ChatGPT is an additional source for colleagues to begin their discussion on how to proceed. Other examples, such as summarising the content of instruction materials for dissemination in other forms (incl. "bite-size" videos) demonstrate how instructors could benefit from artificial intelligence tools to automate specific tasks (Mitussis and Reppel 2023).

While details of these and other potential use cases have to be evaluated on a case-by-case basis, perhaps the most pressing issue is how ChatGPT and similar tools can be used to support student learning. We believe that the publicity around ChatGPT is an opportunity to create awareness of AI technology and to facilitate critical engagement with it. For example, instructors could leverage the application in their classrooms to support the development of needed skills by asking students to pose ChatGPT a question (beginning with specifying certain basic parameters), and to add additional parameters as the semester—and knowledge—grows. The intellectual task for students thus shifts towards reflecting on the strengths and limitations of the application and AI technology more broadly, towards fostering AI literacy.

Towards AI Literacy: A Way Forward?
Literacy around artificial intelligence is largely absent from mainstream marketing education, yet arguable more important than any other single marketing topic. Of course, discussions around technology "literacy" are nothing new. During the early 1980s, for example, the need for children to become "computer literate" was heavily promoted, leading to initiatives such as the BBC microcomputer in the UK and the promotion of Apple computers to schools across the US. At the time, critics, such as Roszak (1986), observed that the call for "computer literacy" was largely driven by consultants and those selling computers and related services. In other words, it was promoted by those benefiting from the widespread adoption of computers. In response, Roszak questioned whether young people—and society more broadly—really benefit when "computer literacy" takes priority over, say, "music literacy" and other appreciations of language, history, culture, and the arts.

In this context, ChatGPT offers a welcome opportunity to revisit Roszak question whether technology "literacy" should take priority over other, less employer-focused, topics. It is a common misconception to equate "education" with the training of "skills" deemed useful and/or demanded by (often imaginary) employers. While we are sympathetic to the argument that educators must never be blinded by the light of technology, we acknowledge that, this time, it may really be different. Given the profound consequences artificial intelligence will have on individuals, but, more importantly, for society in general, facilitating literacy around it is much more important than "Internet literacy," "social media literacy," or indeed "computer literacy" were in the past.

While these examples have in common that they cover important aspects of personal safety and productivity, artificial intelligence, in contrast, increasingly determines our collective fate. It impacts us individually as, say, consumers (e.g., how much an algorithm says we are "worth"), but, more importantly, collectively as citizens; with some observers worried that it threatens democracy itself (O'Neil 2018). Consider the (often used) example of applying for insurance. Whether we qualify for an insurance and how much our annual premium will be is based on a statistical model or algorithm that consists of parameters and is trained on past data. Both parameters and the data it is trained on are unknown to us. "AI literacy" helps to expose this information asymmetry and the fact that the algorithm determining whether we qualify for an insurance is not something abstract, but the result of decisions made by humans. It is the result of a model build by humans, data produced and/or selected by humans to train it and applied by humans in a certain way.

A Macro Response
This example supports the argument that "AI literacy" is one of the most important skills for students—marketing or otherwise. Without it, citizens are unlikely to ever demand transparent algorithms, that is, to call for mandating that algorithms must be made available for public scrutiny. As the implications become more apparent, educators may need to factor into our learning objectives, content, and assessments the complex and interrelated impact of AI, like the way the UN SDGs are increasingly being reflected in syllabi.

However, while it is easy to call for "AI literacy" to be embedded into the curriculum, but as it is so often the case, difficult to implement. Nonetheless, a fascination of "artificial" intelligence

amongst the public, observed as early as the 1960s by Joseph Weizenbaum for example (Weizenbaum 1966; Weizenbaum 1976) may still be strong enough to convince enough people to focus their attention on potential benefits or criticise immediate challenges. Once again, we are not arguing for those to be ignored. Instead, we call on macromarketers to focus their attention on what the implications of ChatGPT and similar technologies will be at the intersection of markets, marketing, and society. In other words, we call on macromarketers to create awareness of the friction between what organisations and individuals "want" from a new technology, and what society "needs" from it.

Building on the suggestion that the goal of education is to support students becoming critical thinkers (Galloway 2023), macromarketers are particularly well positioned to perceive the convenience of ChatGTP becomes an asset to facilitate "AI literacy" across a wide range of student populations, notably by contrasting the micro perspective of "AI as yet another tool" with the macro perspective being mindful of consequences for society. How we frame ChatGPT and AI matters for the future of education. In the following, we expand on our proposal that macromarketing pedagogy is well positioned to facilitate and advance "AI literacy" in management education.

Immediate actions to ChatGPT from educational system stakeholders range from easy fixes (including amendments to an Academic Integrity statements) and AI checks as part of plagiarism software. These passive and immediate reactive solutions—a case of a few weeks—come from framing ChatGPT as another technology, another operational tool to cheat the system. The responsible, ethical, and just use of ChatGPT and by inference, artificial intelligence, is put back on the student as an individual choice. From a MAS theory perspective, this narrow-limited framing of ChatGPT presents it as a non-causal mechanism in a classroom, in the educational system and in society.

However, when two macro trends collide, disrupt, and integrate, as AI and education are doing, in many ways, ChatGPT and similar technologies challenge the status quo and make it increasingly difficult to keep relying on established ways of assessing student work. Consequently, it is perhaps more constructive to emphasise on the ways in which they can support student learning instead of trying to maintain the status quo. A pedagogical, macromarketing and/or digital framing of ChatGPT and emerging AI platforms, through AI literacy, allows various stakeholders in the educational system to diagnose and design unknown pathways forward that benefit society.

AI will create new marketing jobs and careers. With AI, cloud computing, the "Internet of Things" (IoT), and the connectivity the three will give, is it conceivable to deliver ecological, social, educational, and societal impacts to individuals, communities, organisations, and society? What is the role of macromarketing and systems management in that? For example, when combined with virtual and augmented reality (AR/VR), will AI significantly influence marketing education, e.g., through immersive learning? As the technology develops, the implications will become even more far reaching.

Conclusion

We began by asking a question if ChatGPT in the marketing classroom is friend or foe? Is AI friend or foe for marketing professionals? What about marketing systems and macromarketing? Is AI and other systemic technological trends friend or foe? The jury is still out. Best we get busy answering these questions before others answer them for us.

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Automating The Production of Slides, Short-Form Videos, And Other Course Materials: With A Little Help from My Friend, GPT-3

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As educators, we aim to maximize our intellectual involvement in producing high-quality teaching materials, while minimizing our manual involvement in the process (Mitussis and Reppel 2023). In more practical terms, we perceive manual involvement along a continuum ranging from "high" to "low". Creating a detailed course outline with accompanying presentation slides requires high manual involvement. Not only is it necessary to develop separate outputs, but it also falls on the instructor to keep them in sync and up to date. Over the past few years, demands for "bite-sized" videos grew, which further increases manual involvement. Instructors have two options to protect their time for intellectual involvement in producing high quality teaching materials. Either to rely on external resources by assembling textbooks, YouTube videos, and slides prepared by publishers, or to automate the practical aspects of producing teaching materials. While the first option decreases manual involvement, it does not necessarily make space for intellectual involvement as, in the case of textbooks and publisher-produced slides, that task will essentially be managed by those producing the textbook. In other words, relying on external teaching materials decreases manual *and* intellectual involvement. This is not what we are after, which is why we are experimenting with automating parts of the production process. Specifically, we have invested in writing detailed course materials (high intellectual involvement) and have automated publishing them in a variety of outputs (lowering manual involvement).

While this works very well for detailed course manuals (e.g., Reppel 2019) and course-specific textbooks (Mitussis and Reppel 2023), the creation of slide decks and short-form videos constitute an interesting challenge as it requires considerable manual and intellectual involvement with the source material. For example, converting a course manual or chapter from a textbook into a narrated video, requires selecting headlines and short lists of bullet points as visual aids, as well as creating shorter versions of written documents prepared for narration.

Our shared interest in utilizing digital tools without allowing those tools to determine and/or limit what we are trying to achieve led us to experiment with different approaches to minimize the manual involvement required to create presentation slides and video summaries from our intellectual outputs (both those typically destined for academic audiences, such as conference papers and journal articles, and those typically destined for student audiences, such as textbooks and other teaching materials).

In this practical session, we will share what we have learned so far by demonstrating different approaches of turning our written course materials into presentation slides and video summaries. These range from minimal manual effort to a fully automated toolchain that uses GPT-3 to create course manuals and narrated video presentations from our existing intellectual outputs.

As is so often the case with new technologies, our experiments once again highlight the need for educators to leave our comfort zone—most notably of continuing to work with the tools we are familiar with. The work we have done automating some of our processes is not without cost, it required us to develop a knowledge based and skills in the relevant technology. The solutions are not turn-key in the sense that manual interventions are still necessary, but they are more intellectual than manual. For example, technology to automate the creation of summaries from our existing intellectual materials has improved dramatically, but it still requires proof reading and editing. Because the technology is advancing rapidly, many functions that need to be integrated in these types of systems need constant review to ensure the best ones are deployed (and hence we continue our experiments).

In this session, we will demonstrate different toolchains and reflect on the trade-offs we have encountered. On the benefits side, we value the opportunity to take more ownership of the narrative arc and content of our courses that comes from being less of an educational bricoleur (see Hatton 1989) more of an author of our courses. However, we have dedicated considerable time developing our skills that is unnoticed, and unrewarded, there are fees to use some of the systems, and the systems we have developed are not suitable for widespread diffusion, and there is a risk of a certain homogeneity of style and character, if more widely diffused. We conclude with possible ways mitigating them.

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ArcGIS StoryMaps: An Ideal Connection Tool for Macromarketer Educators

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As Macromarketers, we care not only about the value of connection in our research, but also in how we teach the next generation of macromarketers to address critical global issues. We remain on the lookout for new assignments and tools that engage our students. Yesterday's tools may be inadequate for preparing our students for tomorrow's macro-level challenges. We desire to incorporate the latest technology into the classroom in ways that facilitate our teaching objectives.

ArcGIS StoryMaps is a tool that opens up new possibilities for our students. Here, I introduce the tool, make the case that it is particularly relevant for the students' development of macromarketing thinking, and provide an example of how I applied it in the classroom.
A StoryMap can be anything that brings together multimedia and narrative to tell a story (Olson). ArcGIS StoryMaps is one of many digital applications designed to enable users to create StoryMaps without having website development or design experience. ArcGIS is a geographic information system (GIS) created by the company Esri (Esri). "StoryMaps are configurable web applications that combine interactive maps and scenes with multimedia content (like photos and videos and other content from the web), narrative text, and they tell stories about the world" (Esri, 5/31/22). StoryMaps are a tool that allows complex information to be more easily communicated to a general audience (Olson).

StoryMaps have been used for years in disciplines such as geography and the natural sciences. The relatively user-friendly and non-technical interface makes StoryMaps ideal for use as an educational technology (Strachan and Mitchell 2014). Student evaluations are shown to be positive, favoring the technology over PowerPoint (Cope et al. 2018).

There are several important points of connection for macromarketers. The interactive maps prompt the creator and audience to think more about the connectedness of a marketing system. We need to think in terms of *stories* to inspire audiences about the challenges facing the world and the need for solutions. Current and future macromarketers should be concerned with making their case to an audience beyond their own academic discipline (Olson).

Online teaching during the COVID-19 pandemic necessitated rethinking of our traditional ways of teaching and student demonstration of learning. Even though many of us are back to in-person teaching, this is still a moment to be innovative about new techniques. I sensed a value in moving away from a tradition term paper or presentation, both because of the increasing opportunities for plagiarism and a desire to breathe new life into the semester-long project.

In Fall 2022 I was given the opportunity to design a new course in our international business department, entitled, "Global Business: Theory and Context." I immediately began to think about the possibilities of incorporating macromarketing into the curriculum and what type of a project and technology would best support the learning objectives. I do not consider myself an early adopter of technology, but appreciate partnering with others who can push my teaching forward.

We can discover allies in other departments and offices on our campuses and communities. I reached out to the academic technology office on our campus, which has the stated mission of, "Supporting faculty and students in the creation and use of new media for presenting ideas in the classroom and to the world" (Dickinson College). I discovered that we have a Spatial Literacy Center and GIS lab on campus with staff and tutors available to support our students. Without mastery of the technology myself, by partnering with this center, our students had the resources to dive right in.

For the project, students worked with a partner to complete a PESTEL analysis of one global corporation of their choice. Throughout the semester, students followed the changing macro-contextual factors confronting the managers of the selected corporation and refined their ideas in several writing assignments. The final deliverable was a StoryMap in which students showed the changing and interconnected macro factors, suggested response to be resilient in the face of risk, and the societal and sustainability implications of its decisions. Students presented their StoryMaps to their classmates and representatives of the academic technology office at the conclusion of the semester. Students also had a link to their StoryMap to share with future employers to demonstrate understanding about the context of global business and also their technical ability using ArcGIS StoryMaps.

The students connected ideas and created presentations that went far beyond what I have seen in standard PowerPoint presentations. The incorporation of multimedia also made the presentations more current and interesting to a wider audience. The students demonstrated at least progress toward telling a compelling story rather than merely conveying information. Student feedback was positive.

I hope that presenting this tool at the Macromarketing Pedagogy track will inspire other macromarketers to consider another tool for educating their students, and more generally to think innovatively about the use of new technologies in teaching, research, and communication to broader audiences.

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Quality of Life and Wellbeing Track

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Examining the Dimensions and Moderators of the Relationship between Voluntary Simplicity and Wellbeing

Leah Watkins, University of Otago, New Zealand
Rob Aitken, University of Otago, New Zealand
Loic Li, La Trobe University, Australia

Against a background of concerns with the unsustainability of present patterns of consumption, this paper contributes to our understanding of the relationship between voluntary simplicity practices and wellbeing. Overall, our results suggest that it is the psychological and emotional need fulfilment of VS, derived from the relationships, social connection, community involvement and sense of living a purposeful and meaningful life that positively impacts wellbeing for voluntary simplifiers.

Introduction

Exacerbated by existential threats such as global warming, and by continuing uncertainties and anxieties following the health and financial implications of the pandemic, motivations to live more simply need to be better understood and the relationship between consumption and wellbeing more closely examined. Defined as the limiting of "expenditures on consumer goods and services, and the cultivation of non-materialistic sources of satisfaction and meaning" (Etzioni 1999), VS provides "the possibility of a double dividend for society promoting both ecological and personal well-being" (Rich et al. 2020). Although a generally positive relationship between VS and wellbeing has been established in recent studies, there remains a number of gaps in our understanding (Hook et al. 2021). Specifically, as identified by Rebouças and Soares (2020), which of the elements of a VS lifestyle are most significant in predicting wellbeing and which aspects of wellbeing are most enhanced by VS. The authors also suggest that there is a gap in our understanding of the nature and role of the most influential moderators of the relationship (Rebouças and Soares 2020). Accordingly, the present papers addresses these gaps and provides empirical and validated support for the nature and role of the mechanisms and moderators that explain the relationship between VS and wellbeing.

Voluntary Simplicity (VS)

VS is seen to encompass both a value and behavioural component, defined as a system of beliefs and practices centred on the idea that personal satisfaction, fulfilment and happiness, result from a commitment to the nonmaterial aspects of life (Zavestoski 2002). In the first systematic review of the VS literature, Reboucas and Soares (2021), suggest that VS is as an umbrella term covering numerous motivations and practices and identify six recurrent aspects of VS: reduced material consumption; search for intrinsic values, well-being and quality of life; environmental responsibility; social consciousness and focus on relationships; self-sufficiency, and, reduction of working hours.

The current study employs Rich et al's (2020) scale to explore the 6 dimensions of VS: material simplicity; a frugal approach to the use of resources; local procurement; self-sufficient food production; giving back to the community, and, individually enacted work/life preferences and their relationship with wellbeing.

VS and Wellbeing
The current research investigates both hedonic (Cummins et al. 2003) and eudemonic wellbeing (Diener et al. 2010) to provide a better understanding of the multidimensional phenomena of wellbeing. Research on the relationship between VS and wellbeing initially concentrated on the lifestyles focus on restraint of consumption desires and replacement of materialistic values. Research has also considered the lifestyles focus on intrinsic values as leading to wellbeing. More recently, it has been proposed that VS might also influence wellbeing through the satisfaction of psychological needs for self-determination (Hook et al. 2021; Lloyd & Pennington 2020; Rich et al. 2017).

In their recent review of research examining the relationship between VS and wellbeing, Hook et al (2021), identified 23 studies and found a positive relationship in the majority of them. Hook et al (2021), suggest that further research is needed to identify and understand the potential moderator variables of the relationship, in particular, identifying income, age and gender as moderators requiring further investigation. Importantly, Hook et al's review (2021) also suggests further research is needed to provide a more nuanced and comprehensive understanding of the nature of the relationship between VS and wellbeing, including exploring whether certain aspects of voluntary simplicity are more strongly related to wellbeing than others, as well as further research to explore the effect of voluntary simplicity on different types and domains of wellbeing (Hook et al. 2021).

Method
The current study uses data collected for the New Zealand Consumer Lifestyles study (Watkins et al. 2021). Data was collected from 1643 individuals in late 2020 using an on-line questionnaire covering a range of psychographic, consumption and lifestyle questions. The sample closely reflects the NZ census (Stats NZ 2022) for gender, age, education, income and ethnicity.

For the present study, three scales included in the NZ Consumer Lifestyles Study, the Voluntary Simplicity Engagement Scale (Rich et al. 2020), the Personal Wellbeing Index to measure hedonic wellbeing (Cummins et al. 2013) and the Flourishing Scale to measure eudemonic wellbeing (Diener et al. 2010) were analysed.

Results
Multivariate linear regression was employed to test the relationship between VSE at the second-order level and the overall level of quality of life and flourishing, as well as the seven individual aspects of quality of life. The results suggest that VSE positively influences satisfaction with overall quality of life ($b = 0.128$; $t(852) = 3.766$, $p < 0.01$), and flourishing ($b = 0.368$, $t(852) = 11.551$, $p < 0.01$).

At the dimensional level, with the exception of future security ($b=0.039$, $t(852) = 1.147$, $p=0.252$), VSE has a significant positive relationship with all six individual aspects of quality of life, namely Living Standard ($b = 0.084$, $t(852) = 2.461$, $p < 0.01$), Health ($b = 0.099$, $t(852) = 2.916$, $p < 0.01$), Achievement ($b = 0.123$, $t(852) = 3.628$, $p < 0.01$), Relationship ($b = 0.105$, $t(852) = 3.081$, $p < 0.01$), Safety ($b = 0.068$, $t(852) = 1.986$, $p=0.047$) and Community ($b = 0.182$, $t(852) = 5.390$, $p < 0.01$).

Linear regression analysis was conducted in SPSS to test the relationship between the five first-order constructs of VSE (Resources, Procurement, Self-sufficiency, Beneficence, and Material simplicity) and overall quality of life. The regression model is significant ($F(5,848) = 5.680$, $p < 0.01$, $R^2 = 3.2\%$). Beneficence is the most influential predictor of overall quality of life ($b = 0.233$, t $(848) = 3.246$, $p < 0.01$). While both Procurement and Self-sufficiency are significant at the 10% level, Self-sufficiency positively influences quality of life ($b = 0.056$, $t(848) = 1.713$, $p = 0.087$), but Procurement negatively influences satisfaction with quality of life ($b = -0.075$, $t(848) = -1.831$, $p = 0.068$). No significant results were found for Material simplicity ($b = 0.022$, $t(848) = 0.836$, $p = 0.403$) or Resources ($b = -0.059$, $t(848) = -0.196$, $p = 0.844$).

A moderation effect was found for income and gender, while age does not moderate the relationship between VSE and quality of life. The same moderation analyses were performed on the relationship between VSE and flourishing. Similar to the findings of the moderation analyses with quality of life, the moderation effect was found with income and gender, while age does not moderate the relationship between VSE and flourishing.

Discussion
In relation to the validation of Rich et al's (2020) Voluntary Simplicity Engagement scale (VSE), our exploratory factor analysis confirmed 5 of the 6 factors. The work/life dimension was not found to be stable. Our results suggest that the refined VSE scale with 5 first order constructs provides researchers with a valid VS identification tool and a reliable base from which future research may be developed.

Results also show a direct and positive relationship between VS and both hedonic and eudemonic wellbeing. Our findings suggest that VS positively impacts both psychological flourishing as well as satisfaction with quality of life as a whole and many of its dimensions, including standard of living, health, relationships and community. Further to this we have made new contributions called for by Hook et al (2021) regarding relationships at the dimensional level. Results show that the VSE dimensions of beneficence (that is, community and sharing), and self-sufficiency have a direct and positive relationship on satisfaction with overall quality of life. The dimension of procurement, that is, the reasons for, and the nature of, obtaining food, had a negative relationship to wellbeing. This result suggests that the benefits gained from a commitment to VS, are not always balanced by the efforts required to achieve it. This aligns with previous research which suggests that product availability and accessibility barriers to consuming more responsibly (Aitken and Watkins 2014). The potentially limited availability of products, the relative inconvenience of their location and the 'maximising' efforts required to obtain them have been shown to be negatively correlated with happiness and life satisfaction (Schwartz et al. 2002).

In relation to dimensions of wellbeing, results show a direct positive relationship between VSE and the wellbeing dimensions of living standard, health, life achievement, satisfaction with personal relationships, safety and community, but non-significant effects for future security. This suggests that VS has a direct positive effect on most aspects of life satisfaction.

In relation to the key moderators of income, gender and age, results suggest that income and gender moderate the relationship between VS and wellbeing, this is true for both hedonic and eudemonic wellbeing.

Conclusion
Responding to calls for research to more fully understand the relationship between VS and wellbeing, the present paper provides a number of important contributions.

Firstly, the findings highlight the importance of personal and community relationships, sharing and cooperation, and feelings of autonomy and competence characteristic of the VS lifestyle, as leading to a greater sense of satisfaction with the quality of various aspects of life and a sense of personal flourishing.

A further contribution is in response to understanding the moderating influence of age, income and gender on the relationship between the dimensions of VS and wellbeing. Our results show that age is not a significant moderator, however, we show that income negatively moderates the relationship to wellbeing, and the female gender has a stronger positive influence on this relationship.

Overall, our results suggest that it is not directly the commitment to, or enactment of frugality and material simplicity that leads to wellbeing, but, instead, it is the psychological and emotional need fulfilment that derives from relationships, social connection, community involvement and a sense of living a purposeful and meaningful life that promotes it.

The main contributions of this study are the empirical insights we provide to better understand the relationship between sustainable lifestyles and wellbeing. Given the increasingly urgent calls for changes to patterns of consumption and the continuously important concerns with human wellbeing, lifestyles such as VS offer a way to reconcile the demands of both. Our results suggest that resisting the exhortations of consumerism by living simply, connecting meaningfully and achieving purposefully, can lead to greater happiness and wellbeing. This understanding may aid the development of policy that encourages changes to consumption behaviours and help policy makers in the framing of their communication and message appeals in this regard. Perhaps, most importantly, this knowledge might help to normalise the adoption of VS and sustainable lifestyles as a route to personal and social wellbeing.

Implications
Empirical evidence of the wellbeing benefits of a simple lifestyle can provide the encouragement to both reduce individual consumption and adopt more sustainable and collaborative forms of consumption.

In demonstrating the positive relationship between sustainable consumption practises such as collaborating, sharing, material simplicity and wellbeing, public policymakers have a more robust and informed basis upon which to develop policies that benefit both people and the planet. This knowledge could allow the promotion of sustainable lifestyles by emphasising that reduced-consumption practices are not only beneficial for the environment, but also to the financial, subjective, psychosocial and overall life satisfaction of individuals. Informational and

educational campaigns should promote efforts to live more simply by highlighting the personal benefits, such as independence, autonomy and the wellbeing advantages of a less materialistic approach to life. In line with behaviour change theory, associating simple living with positive emotions and outcomes rather than messages that focus on the possible negative effects of overconsumption are more likely to motivate behaviour. Messages can also position collaborative consumption as a form of social interaction to strengthen its appeal to communities. The promotion of the links between simple living and personal wellbeing and environmental sustainability is also an important socialisation message for young consumers as we seek to change overconsumption norms.

Our results suggest that collaborative consumption is an important aspect of VS's relationship with well-being. Therefore, policy changes and business innovations can support behaviour change through opportunities for collaborative consumption e.g. shared gardens, leasing and renting platforms.

Limitations
While panel surveys are widely used in social science research and there is no reason to suggest that their responses are likely to be markedly different to those of the general population, it is important to note the possibility. As with much social science research, particularly that in relation to personal evaluations of emotional and psychological states, the presence of social desirability bias needs to be recognised (Chéron et al 2022).

Future Research
Further exploration of VS and the moderating effects of culture, education and spirituality on the dimensions of wellbeing could provide a more comprehensive understanding of the behaviours and motivations across a range of VS lifestyles and practices. Further understanding the moderating role of moral (Peifer et al. 2020) and political orientation on voluntary simplicity, particularly in relation to the ideological imperatives that underpin political beliefs, could provide a useful way to align public sentiment with political will.

Given the importance of fulfilling psychological needs in the relationship between VS and wellbeing, more research investigating this interaction specifically would be useful. Finally, the extent to which the motivating values for VS (egoistic, hedonic, eudemonic and altruistic) predict wellbeing outcomes would provide a number of complementary insights to the ones presented here.

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Consumption And Hedonic Wellbeing: A Top-Of-Mind Exploration

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Consumption and wellbeing are complex topics, both can be approached using different (philosophical) lenses and operationalizing the concepts is often challenging. This study uses an exploratory approach and focuses on hedonic wellbeing outcomes of consumption, analysing consumers top-of-mind responses to an open-ended question (n=1124): "What do you enjoy to consume and why". Results show that consumers think of a broad range of consumption activities (26 categories) that they enjoy, with food and travel being most often mentioned. The broad range of consumption activities most frequently acted as enablers of an experience, with many respondents emphasizing social connections that are enabled. While the enjoyment of shopping/consuming was hardly discussed, a substantial group of people talked about not-being able to consume beyond basics, or choosing not to consume.

Introduction and Background

Consumption can range from consuming basic necessities of life to luxury brands, from everyday purchases to once-in-a-lifetime experiences, or from purchasing gifts to addictive or destructive acts of consumption (Ganglmair-Wooliscroft 2021). People consume goods, services, ideas or experiences with an underlying intention of making their lives 'better'. Similar to Particularly in the Western World, people strive to be happy (Schkade, Lyubomirsky, and Sheldon 2005) and that state of mind is supported, or hindered, by the various facets of consumption (Bond et al. 2014; Sirgy, 2018; Gilovich and Van Boven 2003). In addition to impacting personal/individual wellbeing, consumption also effects social and ecological wellbeing of a society (Kilbourne, McDonagh, and Prothero 1997; Sethia, Sheth, and Srinivas 2011).

Consumption can be an enabler of various facets of happiness, and consumer segments gain that happiness from purchasing and using (consuming) different products, services and experiences (Ganglmair-Wooliscroft 2017). This view of consumption as an enabler can be related to Vargo & Lusch's (2004, 2008, 2016) *Service-Dominant Logic* and the premises of co-creation of value that ultimately creates wellbeing and happiness (I would like to thank Ahmet Ekici for suggesting this connection).

In everyday life, the word 'happiness' is often used to indicate emotional experiences, but the term is also used more generically when evaluating ones's life (Biswas-Diener and Diener 2019). Happiness, Wellbeing or Quality-of-Life are used as umbrella terms that can include multiple measurable elements (Seligman 2012; Stanca and Veenhoven 2015). Different philosophical viewpoints and different research disciplines do not use terms consistently (Kahneman, Krueger, Schkade, Schwarz, and Stone, 2004; Peterson, Park, & Seligman 2005; Deci and Ryan 2001; Huta and Ryan 2009; Waterman 2008).

The conceptualisation and measurement of wellbeing elements is complex due to the multi-dimensional nature of the constructs (Delle Fave et al. 2011; Disabato et al. 2018; Sirgy 2012). It is useful to classify wellbeing research using three broad categories (Diener 2009; Sirgy 2012): hedonic wellbeing, eudaimonic wellbeing and/or life-satisfaction (or domain satisfaction) research, with the latter traditionally receiving most attention in marketing (Larsen et al. 2002; Lee and Sirgy, 2012).

Given the broad and complex nature of both concepts, researching relationships between consumption and wellbeing is challenging. Consumption can further be approached from different levels of aggregation. For example, existing wellbeing and consumption research ranges from exploring the links between happiness/wellbeing and purchasing a particular product/service/experience (e.g. Bhattacharjee and Mogilner 2013; Gilovich and Van Boven 2003; Goodman, Irwin, and Nicolao 2009), to highly aggregate indicators of consumption (e.g. income or household spending; e.g. Hill and Howell 2009; Sirgy 2018).

The current research takes a meso-level approach of consumption, focusing on perceived hedonic wellbeing. Taking a highly exploratory approach, I investigate consumers' short, top-of-mind responses to the question 'what do you enjoy about consuming and why'. This question was intentionally phrased in a very broad and vague manner as the study wants to explore what angle or direction consumers take when providing top-of-mind responses about the enjoyment of consumption in general. Building on research streams that focus on a particular, often narrow aspect of consumption and (hedonic) wellbeing, the data analysis will explore if consumers mention specific brands or product categories (Ganglmair-Woolliscroft and Lawson 2011), the purchase of goods or experiences (Gilovich and Van Boven 2003), every-day or extraordinary consumption, if consumers include social connections in their top-of mind responses (e.g. pro-social spending (Aknin et al. 2013; Aknin, Dunn, and Norton 2008; Caprariello and Reis 2013; Hill & Howell 2014; Matz et al. 2016) or the importance of personal relationships (Ganglmair-Sirgy 2012; Wooliscroft 2017), or if they enjoy/ not enjoy shopping and buying (e.g. materialism (Dittmar et al. 2014; Kasser 2018) or voluntary simplicity (Etzioni 1999; Newholm and Shaw 2002).

Methodology

Most studies exploring hedonic wellbeing – and related measurement instruments – focus on the frequency with which people experience a range of positive and negative emotions e.g. applying Kahneman et al.'s *Day Reconstruction Method* (*DRM*; Kahneman, et al., 2004) or Diener et al's (2010) short *Scale of Positive and Negative Experience (SPANE)*.

The current research took a different approach and asked consumers for top-of-mind (TOM) answers to an open-ended question embedded in an online survey that otherwise contained traditional quantitative responses. The exact open-ended question read: *"Consuming goods, services and experiences is an important part of many peoples' lives. Please briefly describe what you enjoy consuming/experiencing and why."* The question was placed in the middle of the online questionnaire - the first part of the questionnaire referred to sustainable consumption behaviours (recycling, buying organic, etc), followed by different Well-being measures. The

open-ended question directly followed Personal Wellbeing Index questions (Cummins et al. 2003).

Asking for top-of-mind (TOM) awareness borrows an approach frequently used in branding research where TOM "refers to whether or not buyers recall the brand first …when asked to name brands" (Romaniuk & Sharp, 2004, p. 328). It is the easiest retrieved part of the memory (Stepchenkova and Li 2014). Given the position of the open-ended question in the middle of a quantitative survey, it was assumed that respondents provide immediate responses, without substantial prior contemplation. Similar to TOM in brand awareness and recall research the current study aims to uncover the first association consumers have – the easiest retrieved part of their memory – when thinking about what they enjoy consuming.

The online survey was distributed by a commercial market research company and the final sample contained 1124 usable response from New Zealand (NZ) consumers. The dataset consists of a broad range of consumers: The age of respondents spans from 18 to 85 years (average age 52 years; slightly above NZ average), 52% are female, average income is NZ$ 80,000-90,000 (compared to NZ population, the highest income groups are under-represented), 52% of respondents are in some form of employment (slightly under-represented compared to NZ population), 29% are retired (an over-representation of that group compared to the country's population) and the remaining respondents are equally split between homemakers, students and unemployed (see www.stats.govt.nz for population comparison).

The analysis of the responses, conducted in Excel, was exploratory and took the generally nature of answers into account. Similar to a Content Analysis as discussed by Kassarjian (1977): the researcher first familiarized themselves with the data before extracting broad themes and assigning actual codes to the each comment. This process was iterative, the data was considered several time and a combination of manual coding and key-word counts was undertaken. The aim of this analysis was to gain an understanding of what consumer consider most important (most top-of-mind) when thinking about the enjoyment of consumption (and, if respondents took the time to provide an meaningful answer within the otherwise quantitative survey). The final themes relate to different consumption activities/categories (26 categories), any social focus of consumption (word extraction for social …, family, friends, spouse, or child) and/or the expressed sentiment (emotional, resigned/pragmatic; frugal).

Analysis and Results
The open-ended (and not-forced) question asking respondents to explain what they enjoy to consume and why was answered by almost all respondents with less than 2% of the sample providing no, or a un-useable (gibberish) response, pointing towards the perceived importance of and interest in the topic. The most frequent type of answer related to a consumption category/activity with approximately 70% of respondents mentioning at least one of 26 categories (see Figure 1). Of those respondents who provided a consumption category, most focused on one, or two categories they considered most important (40% mentioned one, and 30% mentioned two categories).

The 26 consumption categories reflect a variety of consumer characteristics and interests with food (29% of the entire sample; 41% of respondents who mentioned any consumption category)

and travel (13% of sample; 19% of people who mentioned any category) being discussed most often. In line with characteristics of short answers for open ended questions, the comments are generally brief and to the point. For example, one respondent who mentioned both categories stated: "I'm vegetarian so I enjoy consuming fruit and veggies. My best experiences are travelling the world".

The two dominant consumption categories food and travel are followed by a range of activities/characteristics, from being outdoors/in nature, and going out/eating, to consuming music or art, to gaming or social media (Figure 1). These top-of-mind most important consumption activities are a reflection of the broad and varying characteristics of consumer. For example, one respondent discussed the enjoyment of craft and gardening, two home-based and rather sedate activities - "I enjoy buying equipment for my needlecraft hobby and my vegetable garden as it makes me feel happy" – while another emphasized the need for excitement by stating "I thrive for adventure and learning and experiencing new things, for me that is what I enjoy consuming and/or experiencing. This could simply be trying a new food to jumping off a side of the cliff. It is all about the adventure and the challenge that I really like and enjoy in life".

Figure 1: Categories that Respondents 'Enjoy' to Consume
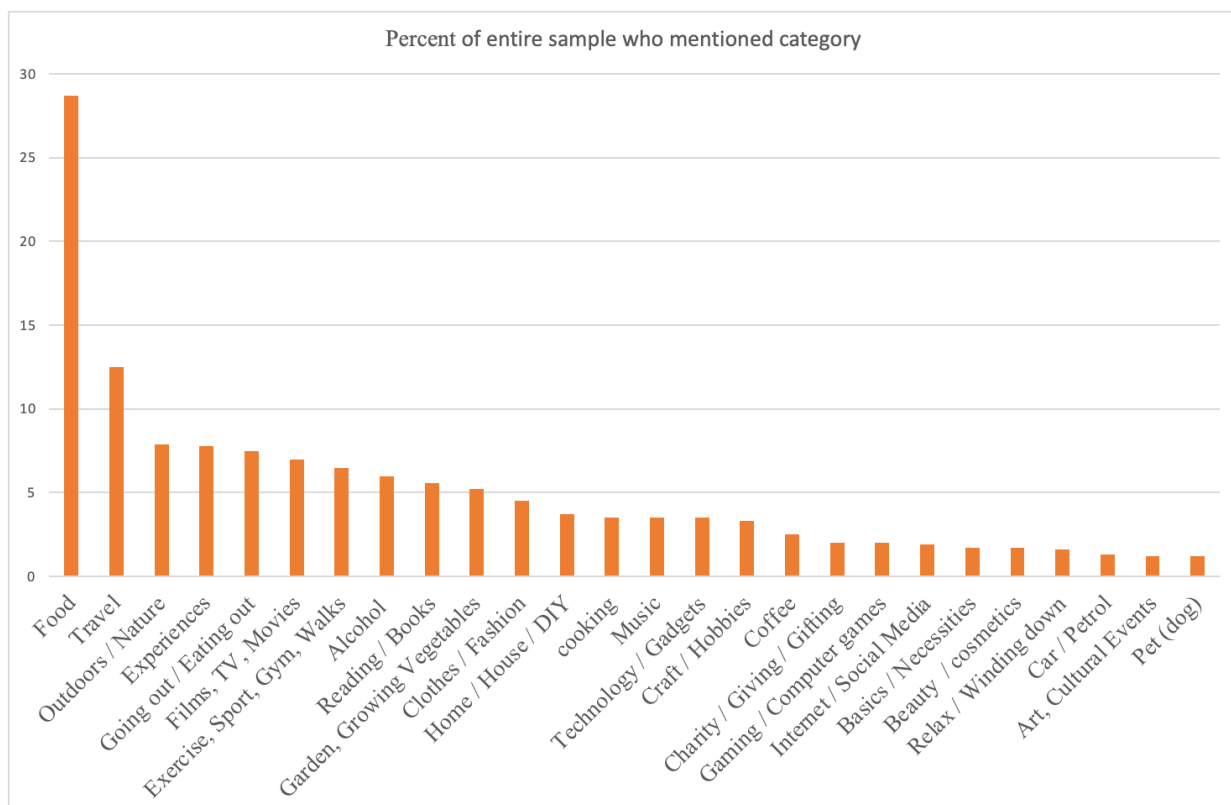
More than one-in-five respondents explicitly talked about the enjoyment of being with and consuming with other people. Again, reflecting the various characteristics and lifestyles of respondents, this covered a broad range of consumption activities. For example while one respondent emphasized sharing food and spending time with others - "Good food and good company – I love enjoying food and spending time with those important to me" – another talked about travel and events shared with others: "Most of the travel is to see family. Also experiences like attendance at music events, cycling with a group and tramping."

The final theme related to respondents commenting on the enjoyment – or otherwise – of consumption. Only 3% of respondents explicitly mentioned that they enjoy shopping or buying things – "I love getting new stuff"- while others explain that they have earned their enjoyment of buying things now by overcoming some previous hardship. For example, "I never had much when my children were growing up because any extra money went on food, clothing, schooling and other things for the children because we put them first before us as any parent would do, but now that we are in a much better financial position we can enjoy buying the things we like or need."

Almost three times as many consumers (8%) were resigned and discussed not being able to afford things. These comments were generally rather brief, "I buy necessities, can't afford any luxuries" or "I don't have extra money to throw around". Roughly the same number of people emphasized that they chose to reduce consumption and to be frugal. For example, "I enjoy the great outdoors and the simpler things eg my garden, my animals. I rarely buy brand new clothes, preferring to buy them on Trade Me [a second-hand online platform]. My food tastes are very basic", while others explicitly highlight that they are not materialistic "I am not materialistic so I like to keep things simple and only purchase what I need". The final theme highlights that there is a considerably big group of respondents who either cannot enjoy being a consumer due to financial limitations, or choose not to strive to consume and or to finding enjoyment in buying things.

Discussion & Conclusion
This study is explorative and investigates top-of-mind responses about what consumers enjoy consuming and why. In line with previous research on consumer lifestyles (Ganglmair-Wooliscroft and Lawson 2011; 2012), and contrary to the vast area of consumer-brand studies, respondents talk about consumption categories rather than brand level consumption. Only one of over 1100 respondents mentioned a particular brand name in their answer.

Similarly, only a small group of respondents link areas of consumption that are frequently discussed in the popular media and/or are the subject of numerous academic studies with top-of-mind enjoyment – for example fashion (5%), beauty (2%), but also consumption of their car (1%). Overall, it can be seen that many consumption activities relate to purchases that enable experiences, beginning with the 2nd most often mentioned category, travel (13%), being outdoors

or in nature (8%), exercise and sport (7%) or home improvements (DIY), cooking or enjoying music (4% each).

The social component of consumption is clearly evident in the answers provided, particularly the importance of family and spending time with people, both often in combination with an activity: doing things together. The purchase of 'things' (food, transportation, diverse equipment) again is an enabler for these shared experiences.

The categories and their frequency ranking reflect a mixture of every-day consumption that is enjoyed – particularly related to preparing or consuming food and drinks - and special (extraordinary) consumption activities – most frequently related to holidays and travel.

The discussed results reflect the breadth of activities that different consumers, or groups of consumers enjoy as they maintain/improve their hedonic wellbeing. Consumption and purchasing 'things' is an enabler for (shared) experiences. It is about what people do with the things they buy that makes them happy.

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Revisiting Government's Role in Provisioning: Observations through a Macromarketing Lens Track

SPECIAL SESSION

Co-Chairs:

Stanley J. Shapiro
Simon Fraser University, Canada

Julie V. Stanton

Pennsylvania State University, United States of America

The Inadequacies of Solely Using a Macromarketing Lens – Introduction to the Special Session

This special session resulted from Stan Shapiro reaching out to Professor Benton, asking about possible interest in contributing to his and Julie Stanton's track, *Revisiting Government's Role in Provisioning: Observations through a Macromarketing Lens*. He had noticed a theme in essays, and in the recent work of others, regarding how free market Friedman economics, carried to extremes by special interest groups, has made government a tool for facilitating income inequality. Stan felt the track would be especially appropriate for anyone interested distributive justice, broadly defined. He then proposed a special session exploring various dimensions of the "macromarketing and public policy" interface.

Professor Benton responded that he might be interested in a special session designed **and intended** to make clear that marketing is the servant of classical/neoclassical/neoliberal economics and that macromarketing is little more than the liberal wing of that handmaidenship.

Professor Shapiro replied, "Now that's a statement … worth attention." Prof. Benton reluctantly agreed to a special, invited session, hopefully arguing that there are inadequacies in the

macromarketing lens that Professors Shapiro and Stanton have suggested contributors to their track use to highlight the role of government. Bringing these inadequacies to light, and perhaps what should be done about them would make a great session. And, hence, this special session was born. We hope this session fulfills the hopes and dreams of Professors Shapiro and Stanton.

The first paper is that of Professor Benton. He explains how he came to the position that mainstream marketing—what *macro*marketers sometimes refer to as *micro*marketing—is inevitably tied to classical, neoclassical, and neoliberal economics. It is not criticism; it is recognition of what is. Professor Benton uses the anthropological concept of culture, and especially that of religion as a cultural system, to structure his argument. (This is not a new argument, but one he has made before that he feels is worth repeating.) He then draws on a wider, marketing literature to illustrate, and then hints at what marketers and macromarketers need to do to free themselves from the yoke of classical, neoclassical, and neoliberal economics—if they want to free themselves.

The second paper, by Professors Stasch and Benton, is entitled "The U.S. Government's Program of Welfare for the Wealthy." This paper specifically addresses the initial theme for this track: how is it that special interest groups have made government a tool for legally facilitating income inequality? Their paper discusses how, beginning in the 1970s, the law has been used by certain parties—they call them the power elite and the rich—to regain the incomes and wealth they lost under the Roosevelt (1933-1945) and Truman (1945-1953) administrations, income and wealth they feel was rightfully theirs. The paper is an historical tour de force revealing how the law was used to strategically withhold the generated wealth of the past two generations from 99 percent of the population. They discuss why this should this be of concern to macromarketers, and why the focus of at least some macromarketers should shift to financial institutions and to how government, and the law, really work (as opposed to the eighth grade civics lessons about how it supposedly works). Macromarketing, they conclude, needs to become vigilant and pay attention to the discipline's foundational concerns with social, economic, and labor inequities of the middle and lower classes.

They propose that the success of the past several decades' disappearing act depended on the equally strenuous efforts on the part of macromarketers to believe in the egalitarian fictions associated with *the market* and, until now, an unwillingness to see what is hidden in plain sight. They hope to shed some light in at least one dark corner of the macromarketing system.

The final paper by Professors Fuat and Ulusoy addresses the COVID-19 Pandemic and how it has highlighted shortcomings of a market society, vividly exposing and further propagating pre-existing socio-economic inequalities and inadequacies. That the economy has become an end rather than a means to serve humanity's purposes is a highlight of their paper. They also highlight the individual's predicament of being abandoned in a market society without real support and with very little authority regarding how lives will be organized.

Professors Firat and Ulusoy then explore, taking the state and market dynamics into consideration, and using the lens of critical macromarketing, the foundations of these shortcomings and the role marketing may be playing. Finally, they reflect on what changes may be needed in the conceptualizations of marketing and macromarketing for them to help rather

than hinder the reduction of structural disparities and marketplace discrimination and in social change.

A Framework for Understanding the Role of Marketing in the Economy and Society

Raymond Benton, Jr., Loyola University Chicago, United States of America

As explained in the introduction to this special session, my paper explains how I came to see marketing — what *macro*marketers sometimes refer to as *micro*marketing — as the servant of classical/neoclassical/neoliberal economics and that macromarketing as little more than the liberal wing of that handmaidenship. As Firat and Tadajewski (2009), and others, observed more than a decade ago, macromarketing scholars tend toward a managerial perspective, too, in the sense of "wanting to transform business practice for the better, or at least modify it in the face of social concern and legal criticism" (p. 132). They continued, "For most macromarketers … the economic doctrine of neoliberalism [is] largely accepted … without much criticism" (p. 132).

Similarly, Steffen Böhm and Vinícius Brei once noted, "there are a lot of uncritical, even 'evangelical' voices in the macromarketing field" (2008). But that is getting ahead of myself.

I told Stan Shapiro that I would not create an entirely new analysis but rely on what I have written since the early 1980s. I stand by everything I have written and feel much of it bears repeating. This is my opportunity to repeat it.

Coming out of anthropology, as I did, [1] I understood that if economics was anything it was a system of belief. I came to this with the help of experiences I had after my undergraduate years [2], rogue economists like and Kenneth Boulding (the first chapter of his book, *The Image* (1956), itself titled "The Image" was included in a collection of essays intended for anthropology students), John Kenneth Galbraith (1970), and others.

One might expect that the phrase, the idea, the notion that economics is a *system of belief*, might invoke *ideology,* and there is an abundant literature arguing that economics *is* ideology or ideologically laden (Foley 2004; Freedman 2008; Hoover 2003; Katouzian 1980; Martin 199). Such articles can even be found in what might seem strange places. For example in *First Things: A Monthly Journal of Religion & Public Life* (Spady 2018) and in the *American Journal of Physiology—Cell Physiology* (Dawson 2021). Some defenders argue that *economics* is pure, although *economists* are not.

I was drawn, instead, toward thinking of economics as a *cultural system,* a system of symbols (concrete objects in experience including words, gestures, drawings, rituals, idols, musical sounds and tools; mechanical devices such as clocks, hammers, knives, boats, guns, automobiles, and jet planes; natural objects such as jewels and water holes, markings, images, representations, gestures and social interaction itself) and meanings (the ideas, concepts, values and expressive forms which have been impressed upon, and are transmitted by, the symbols). I recall, as a masters student in anthropology, applying to the Ph.D. program in economics, being asked by fellow anthropology students, "Why economics?" My reply was that economics is *our* culture and I wanted to study *our* culture. I worked on that, that economics is *our culture* (Benton 1982, 1986) and eventually migrated toward the notion that economics is not just *a* cultural system, but specifically a *religious system* (Benton 1990, 2012).

I am not alone in viewing economics as a religious belief system. As long ago as the 1950s the economist Wilford Beckerman (1956) wrote an article in *The Economic Journal* entitled "The Economist as a Modern Missionary." Others have played with the notion, sometimes only rhetorically, while others have been serious but in a way that could be mistaken as rhetorical, sarcastic, or cynical. For example, Jay McDaniel, a psychologist, suggested (McDaniel 1997):

> In our time the dominant religion of the planet is 'economism.' Its god is endless economic growth, its priests are economists, its missionaries are advertisers, and its church is the mall.

Then there is David Loy's "The Religion of the Market" (Loy 1997), Harvey Cox's "The Market as God: Living in the New Dispensation" (Cox 1999), and Richard Foltz's "The Religion of the Market: Reflections on a Decade of Discussion" (Foltz 2007). A few economists have argued that economic theory is a religion, a theology. In this vein see Robert H. Nelson (1991, 1993, 2001, 2004, 2010, 2019), Hill (2001), Rapley (2017a, 1017b), and Waterman (2002).[3]

If you are skeptical that economics is a religion, you have company. In his review of Nelson's 2010 book, *The New Holy Wars,* Carden (2011) suggested that Nelson "uses theological reasoning" to explore "economic religion and environmental religion." A decade later, in his memorial to Nelson [4], Carden admitted that he had "not yet read [Nelson's] books on economics as theology." Despite not having read them, Carden was confident enough to write, "There are a lot of important parallels between 'actual' religions like the Abrahamic faiths … and the environmental and economic religions" analyzed by Nelson (Carden 2011). The environmental religion and the economic religion are not, to Carden, *actual* religions. Carden's view of what is and is not a religion is decidedly Western and decidedly theological.

Jonathan Smith (1998) traces the historical use of, and the meanings attached to, the term *religion*. Smith's primary point is that *religion* "is an anthropological not a theological category" (p. 269), by which he means it "is not a native category" but one "imposed from the outside on some aspect of native culture" (p. 269). In fact, non-European languages have historically not had a direct equivalent to the word *religion*, and before the sixteenth century Europeans simply understood that there were only three kinds of people in the world: Christians, Jews and heathens. To *have* a religion, or religions, was not part of the vocabulary nor the conceptualization.

Religion, then, is a term "created by scholars for their intellectual purposes" and "plays the same role in establishing a disciplinary horizon that a concept such as 'language' plays in linguistics or 'culture' plays in anthropology" (Smith, p. 281, 281-282). To this we can add the role *society* plays in sociology, the *economy* plays in economics, and *marketing* plays in marketing. They mark off a specialists' territory.

Consider (to bolster Smith's point) the way we regularly refer to *the economy* without questioning its objective existence. Yet, as Margaret Schabas (2005) points out, it is by no means clear that just a few centuries ago "people, even the learned communities of Western Europe, perceived such an entity as *the economy*" (p. 1, italics in original). She continued, "That is, the learned communities" of Western Europe did not perceive "the economy" to be a separate entity. Similarly, Diana Wood, author of *Medieval Economic Thought* (2002), suggested the title of her own book was "a misnomer." All thought, she wrote, "whether political, philosophical, legal, scientific, or economic would have been regarded as an aspect of theology" (2002: 1). Finally, Michel Foucault (1970: 127–8) suggested that historians want to write histories of biology in the eighteenth century "without realizing that biology did not then exist." His point: "the pattern of knowledge that has been familiar to us for a hundred and fifty years is not valid for a previous period." If biology was unknown, he continued, "there was a very simple reason for it: that life itself did not exist. All that existed was living beings, which were viewed through a grid of knowledge constituted by natural history."

Returning to *religion*, it is a term and a concept created by scholars for intellectual purposes and it is theirs to define—and define they have. (Smith 1998) points out that in an appendix to James H. Leuba's 1912 book, *Psychological Study of Religion,* contained more than fifty definitions of religion. Jared Diamond (2012) lists and discusses sixteen definitions of religion in his chapter, "What Electric Eels Tell Us About the Evolution of Religion." After reviewing them, Diamond adds his own, a seventeenth. Hence, there are no *actual* religions, Carden notwithstanding; there

are only definitions and models of religion created by scholars for their own intellectual purposes.

I used Clifford Geertz's model for the analysis of sacred systems and his expanded and elaborated definition of religion as a cultural system (1973) [5] and applied them to *economics* and came up with *economics as a cultural system* (Benton 1982, 1986). I eventually mustered the courage to call it what I thought it was: a religious system (Benton 1990). I then took Geertz's discussion of common sense as a cultural system (1983) and applied that to marketing (Benton 1987a), arriving at my position that marketing is the handmaiden of economics and that macromarketing is the liberal wing of that relationship.

What is Meant by Cultural System
Most of us are familiar with the term *culture,* perhaps holding a sense similar to the following, taken from my *American Heritage Dictionary* (1996, p. 454):

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 Firat's sense when he wrote, "Culture [is] all that is humanly constructed" (2020, p. 27). We (and he) may not be aware of it, but this definition comes from the first page of E.B. Tyler's 1871 book, *Primitive Culture*. In anthropology it is known as "the complex whole" definition of culture.

This is *not* what I intend when I use the word *culture*. The concept of culture I employ is borrowed from Clifford Geertz. "Culture" he wrote,

> 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 (1973, p. 89).

Most importantly, culture, in the Geertzian sense, is 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).

Cultural systems can be thought of as extrinsic sources of information, as *models*, sets of symbols whose relations to one another *model* relations among entities, processes or what-have-you in physical, organic, social, or psychological systems by *paralleling*, *imitating*, or *simulating* them. There are two senses to the term *model*, an *of* sense and a *for* sense.

What is stressed in the *model of* is the manipulation of symbol structures so as to bring them, more or less closely, into parallel with the pre-established non-symbolic system. This is what we do when we develop a theory of hydraulics or construct a flow chart. The theory or chart *models* (describes) physical relationships in such a way that those physical relationships are, as we say, *understood*. The theory, the flow chart, is a *model of* reality.

The *model for* stresses the manipulation of the non-symbolic systems in terms of the relationships expressed in the symbolic. This is what we do when we construct a dam according to the specifications implied in the hydraulic theory or the conclusions drawn from the flow chart. Here, the theory is a prescription, a *model for* creating (or recreating) reality.

It is easy to read this, to understand it, and quickly move on. To *really* grasp it (to use a metaphor) I found it necessary to understand, to really understand and appreciate, the following passage (also from Geertz):

> Thinking, conceptualization, formulation, comprehension, understanding, or what have you, consists not of ghostly happenings in the head but of a matching of the states and processes of symbolic models against the states and processes of the wider world (Geertz 1973).

This, too, is contrary to how my *American Heritage Dictionary* defines thinking. "Thinking," it says, is "To have or formulate *in the mind*" (p. 1864, emphasis added).[4] Rather, thinking, analyzing, conceptualizing, formulation, comprehension, understanding—they are *metaphorical* processes, and monumentally so. Consider Maslow's Hierarchy of Needs, the Product Life Cycle, the Wheel of Retailing (if it is still part of the canon), the BCG Matrix (with its rising stars, dogs, cash cows, and question marks), the balanced scorecard, the intersecting Laws of Supply and Demand, even regression equations. They are metaphors, all of them.[6] As professors we hope students learn the models and use them in their analyses of cases so that the unknown (the case) becomes known (in terms of the model, the metaphor). We then hope students carry those perceptions and comprehensions out from the classroom, from the ritualized use of them, into the wider world.

We generally realize, for example, that the rising stars, dogs, cash cows and question marks are metaphors. Do we recognize that the BCG matrix, itself, is a metaphor. Maslow's hierarchy of needs was created by Maslow in 1943. It has now become so ingrained in our way of thinking that it is automatic, intuitive. How else do any of us think of human needs except in terms of Maslow's hierarchy? But how did we think of human needs before 1943? The point, again, is that all of these (and so many, many, more) are conceptualizations created by scholars for their intellectual purposes.[7]

Economics and Religion as Cultural Systems
I first began with the notion that economics is a cultural system (Benton 1982, 1986), that it is, or is one of *our* intersubjective worlds of common understandings into which we have been born, in which we pursue our separate lives, and which we leave persisting behind us after we die. My intent was to unpack the meaning and meaninglessness of economics.

In any society the number of generally accepted and frequently used culture patterns is large, sometimes extremely large. Sorting out the most important ones and tracing their interrelationships is a staggering analytical task. Certain patterns and certain sorts of relationships among patterns recur from society to society simply because the orientational

requirements they serve are generically human. "The problems, being existential, are universal; their solutions, being human, are diverse" (Geertz 1973).

People cannot live in a world they cannot understand. The existential challenges that people everywhere face is that the world, and hence life in it, has no genuine order — no *empirical regularity*, no *emotional form*, no *moral coherence*. Religion as a cultural system addresses and, as we say, solves each of these challenges, for the believer. For the believer (and we are all, in this room and increasingly globally, believers), economics as a cultural system, as a religious belief system, also addresses and solves each of these challenges.[8]

The double aspect referred to above — *models of* and *models for* — was captured by Geertz when he wrote, "Religion is never merely metaphysics" and it is "never merely ethics either" (1973). It is always both metaphysics *and* ethics. Religion brings together a metaphysic (a model *of* the world as it in sheer actuality is) and an ethic (a model *for* living in that world as conceived). Religions demonstrate "a meaningful relation between the values a people holds and the general order of existence within which it finds itself" (Geertz 1973). In anthropological discussions, *models for* are designated the *ethos*; *models of* are designated the *world view*.[9] I like to say that religion exists at the intersection of *Ethos* and *Worldview*.
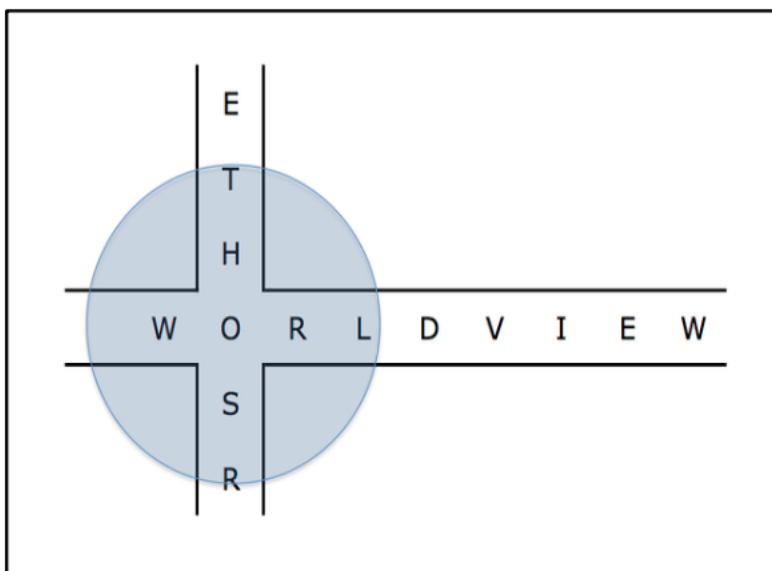
Figure 1: Religion lies at the intersection of ethos and worldview.

The Worldview. A people's world view is their image of the way things in sheer actuality are, their concept(s) of nature, of self, of society (Geertz 1973). A people's ethos is the tone, character, and quality of their life, its moral and aesthetic style and mood; the underlying attitude toward themselves and their world that life reflects. Religious belief brings together a metaphysic and an ethic, a world view and an ethos, a *model of* and a *model for*, in such a way that *the ethos is made intellectually reasonable by being shown to represent a way of life implied by the actual state of affairs which the world view describes, and the world view is made emotionally*

acceptable by being presented as an image of an actual state of affairs of which such a way of life is an authentic expression. This demonstration of a meaningful relation between the values a people hold (ethos) and the general order of existence within which it finds itself (world view) is an essential element in all religions however those values or that order be conceived (Geertz 1973). It is an essential element in economics, too.

Taken separately, the normative and the metaphysical are quite arbitrary. A French ethic in a Navaho world would lack any sense of naturalness and simple factuality that it has in its own context, as would a Hindu ethic in a French world. When taken together they form a gestalt with a particularly strong sense of inevitability. What all sacred symbols systems assert is that the good for people is to live realistically; *where they differ is in the vision of reality they construct* (Geertz 1973). That last sentence is particularly illuminating. Mull it over.

Economics as Religious Belief

Geertz wrote, "Meanings can only be 'stored' in symbols, in a cross, a crescent, or a feathered serpent" (1973).
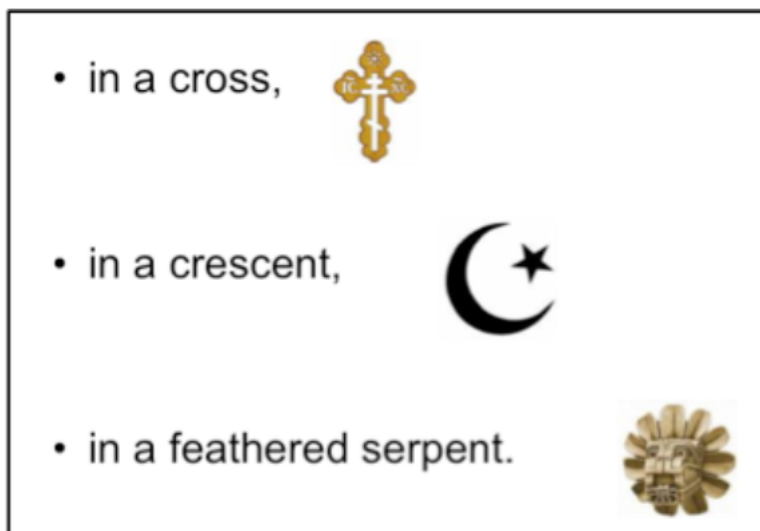
Figure 2: Meanings are stored in symbols.

To get directly to my point now, the cross can be a Latin Cross, a Maltese Cross, or a Marshallian Cross.[10] This image is one of our most powerful symbolic expressions, the one that sums up most what we need to live.
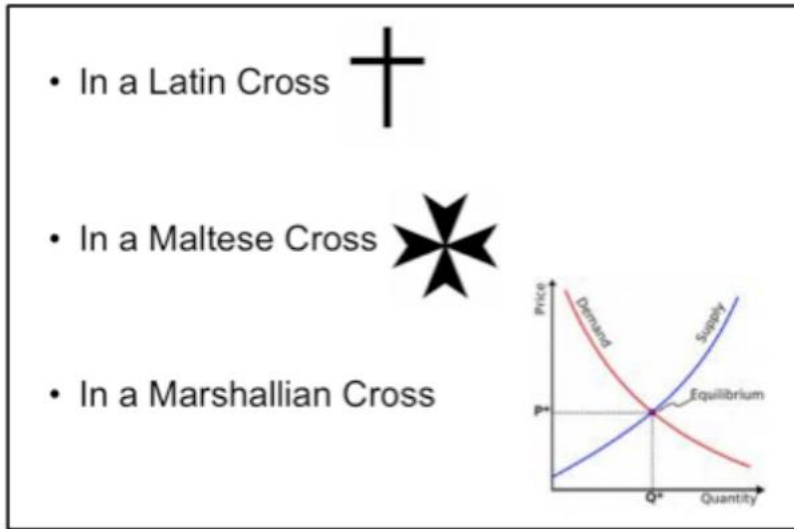
Figure 3: Alternative Crosses.

To consider economics as a religious belief system will shock most of us. Why? While we teach and study economics (we all took at least one course in economics and some of us teach it, and we *all teach* it if we have an introductory class in marketing). But we do not teach nor do we learn *about* economics.

When we teach economics we do so as though it, the science of economics, is a model *of* our price-directed market economy. We teach it as though it is a description of how a price directed market economy works. We teach it as a *model of* the economy. In the present interpretation, economics is better understood as a model *for* the price-directed market economy.

We teach them as laws akin to the laws in the physical sciences, like the law of gravity. To grasp the meaning and significance of these the laws of supply and demand we must consider them not as symbolic expressions of natural processes (nor even as the representation of statistical regularities) but as a specific set of *rules* found in a particular society that, if followed, assures the material provisioning of that society.

The Laws of Supply and Demand provide us with a distinctive directive for our decisions and actions. They formulate a social *code* that, when followed, brings the actions and reactions of discrete individuals into agreement. They thus contain an imperative rather than a description of objective facts. We will do well to consider Adolph Lowe's account (Lowe 1942): "If commercial exchange is to be an effective instrument for want satisfaction, sellers should raise prices when buyers increase their demand," and so on for its various propositions. Only in this way does the price system act as the signal system that conveys the information that economists say it conveys.

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The laws of physics can never be more than principles of *explanation*; we cannot escape them. Economic laws are better conceived as principles of *action*; though we can evade them, we should not because if we do society will not turn out as imagined. The Laws of Supply and Demand do not "describe what an individual member of the market actually *does*, nor does it *predict* what he will do. It *prescribes* what he should do" (Lowe 1965).

The mere existence of a set or sets of rules does not guarantee they will be followed. People must believe that the tensions, conflicts, and injustice that they see around them, and that they may personally experience, are the result of people *not* following them. They must also believe that by adhering to the rules both the conflicts and injustice will be ameliorated, if not eliminated. In the case of economics, and in particular with the Laws of Supply and Demand, only *if* people go along with the rules *then* the social world will turn out as economists imagine it will. And lest we forget, the social world, as imagined by economists, is one that is *perfect* and *pure*.

The Worldview. But wherein lies the world view, our image of the way things in sheer actuality are, our concepts of nature, of self, of society?

Self. Regarding our concept of self, I can do no better right now than to draw attention to Firat's recent discussion (2020). "Each party engaged in economic exchange," he summarized, is liberated

> from all obligations to others with whom [he or she] exchanged. For each party, the only obligation [is] to swap the resources that it had in return for the resources it received. No other relationship needed to occur. The buyer of, say, mulberries, who paid money for her/his purchase would have no obligation to the seller other than the payment. S/he did not have to have any other considerations regarding, for example, whether the seller's child had to climb the mulberry tree to shake the branches to collect the fruit, whether there might have been an accident and the child might have been hurt, and feel guilt or any reason to feel for the seller.

All parties, he continues, are "freed…from any such issues as long as a fair exchange of resources occurred." That is, in part, what lies behind, or beneath, the laws of supply and demand — the liberated and socially unconnected individual.

Society. Social friction exists and has a great many sources: difference between young and old, males and females, rich and the poor, urban and rural, and between levels of income and wealth. There are more. Consider the differences that exist between people of different ethnic origins and identities, each adhering to, and interpreting the world, through different cultural systems (hence Peterson and Minton's (2018) emphasis on teaching belief systems in our marketing classes).[11] There is a single root cause to all of these points of conflict. Nelson discussed the degree and extent to which the concern with social conflict and tension is embedded in economics. He writes (Nelson 1993),

> Economic theology starts with the recognition that through most of history humans have been afflicted by poverty, hunger and disease. These problems are considered the

fundamental reasons that human beings have so often killed, stolen, lied, cheated and committed so many other evils. They have simply been driven to these acts by economic circumstances. Original sin, according to economic theology, is material privation, the condition in which most people have lived.…If this diagnosis is correct, then the means of abolishing evil is clear: salvation lies in eliminating all shortages of goods and services.

Hence, the paramount position of production and of economic growth. Notice, however, the world view component that is embedded in Nelson's passage, the "diagnosis." Killing, stealing, lying, cheating and so many other evils that humans engage in are due to one paramount fact — material privation. If that "diagnosis" is correct, the only reasonable way to live is to live a productive life (the ethos). (Notice, too, that if that diagnosis is not correct the wind in the sales of economic growth dissipates.)

Conflict passes easily and directly to the problem of justice. If severe enough, conflict also often seems undeserved, especially to the sufferer but also to onlookers. The problem has to do with the gap between what various individuals deserve, or feel they deserve, and what they in fact get. "[T]o be just," Alasdair MacIntyre pointed out, "is to give each person what each deserves" (1984). Here a quatrain quoted by Geertz (1973), and perhaps attributable to Charles Bowen, is relevant:

> Rain falls upon the just
> And upon the unjust fellow.
> But mostly on the just
> Because the unjust has the just's umbrella.

The trick is to come up with a definition of justice, and an institutionalization of that definition, that is acceptable to all and grounded in the unalterable facts of life. One concept of justice is that people should receive in accordance with what they produce: payment in accordance with product; reward in relation to effort. The contemporary institutionalization of this definition is *the market*, and it becomes manifest *if the Laws of Supply and Demand are religiously followed*.

We believe that actual prices and incomes (incomes being simply a factor price) are ethically just because they are either based on labor effort expended (the labor theory of value) or on one's contribution as valued by the consumer (the marginal productivity theory of value). Topel (quoted in Bennett 1988) expressed it this way:

> I am of the opinion, until proven otherwise, that the market is competitive. Competition is going to dictate what people make. The best measure we have of the value of what someone produces is what he was paid.

This is a familiar refrain. We have all heard it often. That it is a tautology bothers no one. If I am well off, I can explain to myself and to others that I am productive *and* that what I produce is valued. If I am poor, I explain to myself and to others with a similar affirmation; I am either not sufficiently productive or that which I produce is not so valued by others. No other conclusion is

possible, and it all emanates from the inexplicable working of the Laws of Supply and Demand, if they are being followed.

While there is pain and suffering, and the distribution of spoils is unequal, it is not *inequitable*. If the mind is not set to rest, it is spurred to action, especially among the poor as they see that they must work more, work harder, or work differently. That is what a cogent *ethos* does if grounded in a cogent *world view*.

If the gap between what various individuals deserve, or feel they deserve, and what they in fact get *is experienced as just*, people accept their suffering in silence; if it is not experienced as just, they do not suffer in silence. Among the *faithful*, belief is strong: "Adam Smith's invisible hand, guided by supply and demand in the labor market, equitably signs everybody's paycheck" (Bennett, 1988, p. 1).

The story that economics tells is that the price-setting market is comprehensible, that the problems and difficulties people experience are sufferable, and that, in the end, justice will prevail — but only if all abide by the Laws of Supply and Demand. If we do not, it will not.

Nature. The whole of the Enlightenment, as William Leiss expressed it (1972, p. 30), subscribed to the notion that "the...inadequate provision for human wants was the source of the instability of society and the internecine battle over the share of spoils that threatened the fabric of civility."

Solving the problem of "material privation, the condition in which most people have lived" (to refer, again, to Nelson), of the inadequate provisioning for human wants, a new conception of nature was needed as well. Nature, the natural world, had to be desacralized.

The notion of a desacralized nature is often associated with Bacon, Descartes, Newton, and other Enlightenment thinkers. The attitude, Kinsley accurately writes, "still dominates modern perceptions of the world" (1995, p. 127). Whatever the precursors, and there were precursors (Dijksterhuis 1961), it was not until the Enlightenment that we find a thoroughly desacralized and mechanistic view of nature, a view of nature *un*deserving of moral consideration in the affairs of human beings. This is the reason so much literature in the area of environmental ethics calls, either directly or indirectly, for a "Post-Mechanistic Philosophy of Nature" (Keller 2009), or for moving "Beyond the Enlightenment Mentality" (Wei-ming 1994; see also Hinchman and Hinchman 2001).

It is the desacralized and mechanistic view of nature that largely determines that we see it as having instrumental value only and as not having intrinsic value, value in and of itself. As Kant (1963) said about animals, "we have no direct duties" to them because they "are not self-conscious and are there merely as a means to an end. That end is man....[A]nimals must be regarded as man's instruments."

In short, since the other-than-human deserves no moral consideration we can do with it, and to it, as we please. It is this understanding of nature, and our relationship with nature, that makes possible the paramount position of production and of growth in economics. [12]

This was not caused by but was clearly associated with a major metaphorical shift that was underway, a shift in the root metaphor undergirding it all (Pepper 1935). "Medieval thinkers practically without exception," Warner Stark wrote (1956, possibly on page 4), "conceived of society as an organism. The Pope is the head, the warriors are the arms, the peasants are the feet [and] the misery of the lower orders was a kind of social gout." Or, as Tawney put it, "society is a spiritual organism, not an economic machine" (Tawney 1962). Organism was replaced by the machine as the root metaphor. The machine remains our metaphor of choice today.

Marketing as a Cultural System
Enough with economics. What does all this have to do with marketing, macro or otherwise? "Marketing," Firat writes (2012, p. 81), is "the institutionalized practices of the modern market in its contemporary form" and, as such, is devoted to the expansion of the market. Continuing with my framework, marketing, too, is a cultural system, a form of common sense as a cultural system (Benton 1987a; Geertz 1983).

All peoples have multiple generally accepted and frequently used culture patterns, systems of symbols and meanings, by and through which they give form, order, point and direction to their lives. Economic theory falls into the category of the religious, the sacred. Marketing falls into that category of common sense. As the term itself implies, commonsense is a senseness held in common, which means that it is public, it is shared, it can be questioned, disputed, affirmed, developed, formulized, contemplated, and taught (Geertz 1983). And teach it we do. As a body of knowledge, common sense is vitally important. The everyday world is

> the paramount reality in human experience—paramount in the sense that it is the world in which we are most solidly rooted, whose inherent actuality we can hardly question…, and from whose pressures and requirements we can least escape. A man, even large groups of men, may be aesthetically insensitive, religiously unconcerned, and unequipped to pursue formal scientific analysis, but he cannot be completely lacking in common sense and survive (Geertz1973).

As a body of knowledge, common sense responds to that human tendency "to take the world, its objects, and its processes as being just what they seem to be," combined with "the pragmatic motive, the wish to act upon that world so as to bend it to one's practical purposes, to master it, or so far as that proves impossible, to adjust to it" (Geertz 1973). Unlike sacred symbol systems, the particular orientation of common sense is action upon the world — not mere acceptance of it.

Marketing as a field of inquiry was built by people interested primarily in providing information for the solution of practical problems (; Benton 2021; Jones and Tadajewski 2018). Although initially concerned with, and acting in response to, pressing social issues rather than reasons of business urgency, there was always a concern for generating useful, as Bartels (1976) expressed it, "how-to-do-it" knowledge. It is in this sense that Bartels writes, "The development of marketing thought represented an effort to compensate for the omissions of existing theory" (Bartels 1976). By "existing theory" he intended *economic theory* because "the economic facts of life [were] departing farther and farther from the theories which had been devised to explain economic activity and to guide entrepreneurs and government authorities in behavior concerning

the market" (Bartels 1965).[13] I can't imagine that anybody in attendance today fails to see how textbook marketing isn't instruction in the "how-to-do-it," and the "it" here is the expansion of the market. Beyond description and explanation marketing was faced with justifying the emerging distributive practices and institutions. Though analytically separate, description, explanation, and justification go hand in hand.

Marketing today is perceived and presented as a set of tools and techniques employed by organizations (mostly businesses but since the "broadening" movement of the 1970s increasingly non-business and social cause organizations as well) to elicit desired responses from organizations or individuals within the employing organization's environment. This *how-to-do-it* perspective is the dominant perspective in *micro* (or managerial) marketing today. Kotler (1972, p. 50) once wrote, "Effective marketing means the choice of marketer actions that are calculated to produce the desired…response in the market."

We easily and frequently move back and forth between the perspective of economics and that of marketing. We do so despite the fact that they are different and contrasting ways of looking at the world. As ways of looking at the world, and of acting in it, they are separated by gaps across which one must leap, slip, slide, crawl or climb. How the meanings, the significances, the moods and motivations, the commitments induced by economic theory carry over to marketing thought, and thereby to marketing actions and institutions? How are the two, marketing and economics, knotted together? And is it a Gordian knot?

Marketing textbooks and the marketing literature make abundant if unthinking and unintentional use of rhetorical devices, subtle references to economic concepts, and close association to the supposed results of economic analysis (I more fully discuss this in Benton 1987). All such associations serve to call up the moods and motivations associated with economic theory. Concern here is with certain deliberate conceptual inventions made within the field of marketing that serve as vehicles for transferring meaning and purpose from economic thought to marketing thought. It is not supposed that these devices were intentionally invented to serve as vehicles for the transfer of meaning, although they might have been. They nonetheless serve that function. These inventions include, among others, the term *marketing* (used instead of distribution), the notion of marketing *utilities*, and the *marketing concept*. There are more.[14] But these serve to illustrate how common sense *how-to-do it* rules and guidelines are justified by appeal to formulas and theories grounded in formulas and theories of economics.

Marketing. Early courses in the new subject, taught as early as 1900-1910, dealt with what were known as the distributive industries. The most common designators were *trade*, *commerce*, and *distribution*. A professor at the University of Wisconsin during the formative period, Ralph Starr Butler, was one of the first to have used the term *marketing* (his 1911 text was entitled *Marketing Methods*). Bartels (1976, p. 241) included a letter from Butler where he recounts how he come up with the term *marketing*. That letter reads, in part:

> I surveyed the very meager literature of business which was available at that time and was astonished to find that the particular field that I have very briefly described above had never been treated by any writer. I decided to prepare a correspondence course covering this phase of business activity. A name was needed [and] I remember the

difficulties I had in finding a suitable name, but I finally decided on the phrase "Marketing Methods".

Why did Butler choose it rather than sticking with the already widely used terminology like *Distributive Methods?*

The vocabulary of economics centers on *the market* and economic theorizing, then and now, pivots on *the market*. It is reasonable to expect that those scholars studying the buying and selling processes in and of themselves, in their institutional settings as they actually existed, would be drawn to something that reflected their intellectual and heuristic heritage — *market*ing. [15]

But there is more to it than this simple intellectual affinity; there is a cultural aspect as well. Up to this time the American economy had been a system of largely private (not corporate) enterprise and market entrepreneurship. Economic theory, which generally and adequately described this waning economic system, comprised an understanding that held wide appeal to scholars and the general public. It was compatible with the Jeffersonian basis of American ideology and it reflected the world as it had been and to some extent still was.

It is understandable how and why the name associated with the new body of knowledge that described the new area of business activity (which was, then as now, often criticized) would appeal to traditional values, traditional beliefs, and traditional institutions. Needed was a bridge for the transfer of meaning from economics, with its transcendent emphasis on *the market*, to the new discipline faced with describing the world as it had come to be. The linguistic similarity between *the market* and *marketing* is too close to be capricious. It was, and is, a perfect term. It serves in a capacity where *distribution* or *mercantile institutions* cannot and where terms, in economics, such as *institutionalism* (the school from which marketing arouse) and *monopolistic* or *imperfect competition* do not and cannot. Further, the term *marketing* is consistent at the level of implied meaning with the political predispositions of those economists who preached about *the market* and of those businessmen who wanted to continue to elude state intervention and control.

The Utilities of Time, Place and Possession. Marketing emerged just after economics had been recast in terms of marginal utility analysis. Not surprisingly, *utility* emerged as another bridge over which meaning could flow from economics to marketing.

Louis D. H. Weld was originally a teacher of economics who came to marketing when he received a teaching and research assignment which required that he look into how Minnesota farm products were marketed. Indeed, a phrase which had become popular in agricultural circles after the turn of the century was "the marketing problem," by which was meant the suspected manipulation of prices for farm products by middlemen to the detriment of producers and consumers alike. He began to teach marketing in 1913 and was, like so many others, impressed by the lack of literature on the subject. A course on the marketing of farm products was the result of his first hand investigations. His course was actually one of the earliest in which *marketing*

appeared in the title, as was his 1915 publication, *Studies in the Marketing of Farm Products*, an early example of commodity analysis in marketing.

Bartels (1976) points out that Weld's contributions to marketing thought were influenced by his training in economics. He regarded marketing as a part of the productive process and therefore as something that created utilities — specifically time, place, and possession utilities. The argument is that if productive activity was esteemed for generating *utility* in the *form* that something took, the newer distributive activities, which even today are not accepted on a par with productive activities, must also be esteemed because they generated other utilities without which the actual product would have no utility. In order to be useful, in order to generate utility for consumers, a product must not only have an appropriate form but it must also be in the right *place*, at the right *time*, and get into the right *hands*.

Time, place, and possession utilities were inseparable from form utility. They had been ignored or went unrecognized until the geographic separation of production and consumption made them evident. These latter utilities, however, were the domain of distribution, not of production. It was the task, the function, of marketing to create these utilities just as the traditional producer was responsible for creating *form* utility. As Bartels points out, "These three utilities, later supplemented by some others, were key concepts in the economic rationalization of marketing at the time" (1965: p. 52).

The position is incontestable. Form utility is no utility unless accompanied by the other three. It is not the principle as much as the terminology that acts as the bridge for meaning. *UTILITY!* Marketers and marketing activities produce *utility* just as do producers and production activities. With producers accorded a dominant position in the social hierarchy, it was important for marketers and others to realize that they generated utility, too, because with it came meaning, purpose, importance, and significance. In a production oriented society, in a society which places so much emphasis on the ability to produce, little can bestow more or convey a greater sense of meaning and purpose than the discovery that one is also part of the grand forces generating utility, forces which are thereby consonant with traditional meaning and purpose.

The Marketing Concept. Although the utility approach to the rationalization of marketing activities is still employed, *the marketing concept* has taken over as the main vehicle by which meaning and purpose were transferred from economics to marketing.

The shift in marketing orientations that occurred during the 1950s and 1960s, culminating in the adoption of an explicitly managerial perspective, involved the abandonment of any pretense on the part of marketers to be standing on the outside and observing the marketing system as a whole — as a system. The abandonment, that is, of a *macromarketing* perspective. No longer seeing themselves as intervening on behalf of the system as a whole, as at least some early marketers had, marketers emerged as a force intervening on the side of and in support of the interests of a particular class in society: the business class in general, and the managerial class in particular. The change in orientations was accompanied by a major addition to the arsenal of connective tissue by which marketing and marketing activities were made meaningful — the invention of *a new philosophy of business*, communicated by marketers to marketers as the *marketing concept*.

The *marketing concept* refers to several interlocking ideas, paramount of which is the notion that companies should be *customer oriented* rather than *production oriented* or *sales oriented* as they had supposedly been in the past. According to the *marketing concept,* the way to achieve organizational goals is to determine the needs and wants of various target markets and deliver the desired satisfactions more efficiently and effectively than competitors. It was argued that business decisions are best when they start with *the market*, but also emphasized was that the end and object of all business activity is customer satisfaction.

The essence of the marketing concept and the explicit recognition that it was a philosophy of business, a *needed* philosophy of business, were well expressed by businessmen. Indeed, unlike other modes of rationalizing and justifying marketing activities, the *marketing concept* came not from the academy but from the business community, itself. In a now classic presentation entitled "The Marketing Philosophy as a Way of Business Life," Fred Borch (1957), an executive at General Electric, wrote, "when the economy was much younger" a customer or consumer orientation "was a built-in feature of business enterprise."

As a company grows in size it can drift further and further from a customer orientation because size takes away the ability of the marketer to know personally each customer. As a company grows in size, therefore, it is necessary that it become consciously aware of that possibility. "What we refer to today as the marketing philosophy is a recognition of just this situation" (Borch 1957).

> J.B. McKitterick, also an executive at General Electric, opined (1957, p. 2)
> I would speculate that looking back [in] 20 years hence, the marketing concept belatedly will be recognized as an appropriate voicing of the basic purpose of corporate institutions grown too large to be adequately guided by the profit interests of a single compact group of owners (p.77).

These excerpts reveal that the *new* philosophy of business, symbolized by *the marketing concept*, was a means by which corporate management could reconnect with a vague and imagined but nonetheless sacred past, a past that had become and remains frozen in all its timelessness in economic theory. The affinity with the economists' concept of *consumer sovereignty* should be clear. To readers of Kotler's textbook back in the day, just in case they missed it, the affinity was made clear. In his discussion of the marketing concept, Kotler stated that it is an expression of the company's "commitment" to the time-honored concept in economic theory, "consumer sovereignty" (Kotler 1984). I don't know if such a reminder is necessary today.

There is a significant difference between *the marketing concept* and the *concept of consumer sovereignty* in economics. In economics, consumer sovereignty is the unintended consequence of a social and economic system of a particular structure, a structure characteristic of the economy when it "was much younger." In such an economy, self-interest, motivated by private gain and profit making, can be pursued and the end result, of no intention of the businessman, is the satisfaction of consumer needs and wants as consumers, themselves, define and express those needs and wants. That is the essence of the doctrine of consumer sovereignty and it was once "a built-in feature of the system." The consumer orientation via the *marketing concept* is an

expression of intent. Since the institutional nature of the modern economy is no longer such that consumers' sovereignty is the unintended result of economic action, it had to become corporate management's *intent* to bring about that same result. The conscious goal of corporate enterprise was proclaimed to be consumer satisfaction.

It is this symbolic congruity between the marketing concept and the doctrine of consumer sovereignty that made it possible for McKitterick to say that the marketing concept "will be recognized as an appropriate voicing of the basic purpose of corporate institutions." It is appropriate because it is consistent with the philosophical position of economic theory — it is consistent with custom, tradition, and a bygone era. (Missing from both, however, is an account as to why the consumer should be sovereign to begin with. See more on this, below.)

The rub is, of course, that those same sophisticated marketing techniques used to accomplish traditional goals can also be used to *manage demand*. A few pages before Kotler juxtaposes the marketing concept with the concept of consumer sovereignty, thereby symbolically equating the two, he wrote (Kotler1984),

> Marketing management has the task of influencing the level, timing and composition of demand in a way that will help the organization achieve its objectives. Simply put, *marketing management is demand management*.

In context and as used by Kotler[16] the word *management* implies its traditional meanings and attendant images of controlling and arranging and demeaning and reducing.

Thus the marketing philosophy is not an end in itself, as is the case with consumer sovereignty, but a strategic means to another end — continued corporate growth and expansion. It is far easier to castigate a corporation pursuing growth and expansion by pursuing profits than to castigate it for pursuing consumer satisfaction.

By symbolically establishing a congruity between managerial intentions and economic doctrine the marketing concept provided another bridge to transfer the meaning and significance of economic thought to marketing thought, marketing practice, and modern marketing institutions. This link is critically important since it is marketing that has been largely the cause of recent economic growth, is credited with bringing about the contemporary emphasis on consumption, and is the primary receptor of moral and ethical criticism of business today. The Marketing Concept provides the meaning and purpose, the primacy of decision values, for corporate managers. The Marketing Concept provides the soundest and tightest knot yet tied between marketing thought and economic thought.

Those are a few of the symbolic links that join marketing as a cultural system to economics as a cultural system, with economics being the senior partner. As suggested, above, when I first wrote the paper to which I refer (Benton 1987) I was remiss in not including the obvious bridge: *exchange*. As Firat (2022, p. 23) reminds us, citing Bagozzi (1975) and Kotler (1972), "Marketing, the institutionalized practices of the modern market in its contemporary form, has…adopted exchange as its core concept (Bagozzi 1974 and 1978).

On the first page of his 1978 article in the *American Behavioral Scientist,* Bagozzi suggested that marketing had historically progressed through a stage during which it "was more concerned with the technology for performing everyday activities in the marketplace than with the nature and adequacy of its conceptual underpinnings" (1978, p. 535). This was followed by a second stage during which attempts to create a marketing *Weltanschauung* (Bagozzi's word) by applying paradigms borrowed from allied disciplines. Thus, marketing employed a functionalist approach, a systems approach, and a decision-theory approach. He wrote that each left marketing wallowing for specification and definition. "A lacuna still exists between problems found in the marketplace and our ability to understand and react effectively to them." His solution, without realizing that he, too, was borrowing from another discipline, was to conceptualize "marketing as exchange." [17]

Broadening the Marketing Concept. At about the same time there was a movement to broaden marketing to apply to organizations other than business: government, nonprofit, healthcare. Dholakia, Ozgun, and Atik (2020) have provided a provocative exposé of how that, too, is related to economics — and specifically to the neoliberal economics of the past fifty years (see, also, the related literature on the marketization of the economy, e.g., Firat 2020 and Tadajewski 2020). The broadening movement in marketing has become "an instrumental (albeit often reluctant) tool of neoliberal capitalism" (p. 870). They look at the "overlaps and the influences" that have occurred across two seemingly unrelated historical processes — the broadening of the marketing concept and the rapid rise of neoliberal ideologies and policies (p. 870).

If my framework for this paper is accepted, it could be nothing other than expected that many more "influence flows" could be discovered should critically oriented macromarketers care to look for them. Why bother? Dholakia, Ozgun, and Atik write (p. 870):

> Revealing the latent relations of the broadening of marketing discourse with neoliberalism … provides us with the incentive to theorize alternate discourses in marketing and allows better theoretical articulations that lead to socially and politically responsible marketing practices.

Positive Marketing. The movement for *positive marketing,* not to be mistaken for positive economics (Friedman 1953; Hutchison 2003; Mosini 2012) is a case in point. It is not possible to read the definition of positive marketing and not see the most recent definition of marketing from the American Marketing Association. That AMA definition (2017, its approval date) is:

> Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.

The definition of Positive Marketing is:

> Positive marketing is marketing in its ideal form, in which parties – individual customers, marketers, and society as a whole – exchange value such that individually and collectively they are better off than they were prior to exchange. (Center for Positive Marketing)

I am hard pressed to see a difference. Neither did Tadajewski (2016, see, below). In fact, neither does *The Center for Positive Marketing*. Their discussion, following their presentation of the definition, is clear:

> Positive marketing simply shifts the focus to the latter part of the definition…recogniz[ing] the interdependency of the parties mentioned…deliver[ing] value to customer(s), the firm, and society at large.

It is an attempt to *reframe* marketing, to nudge it to engage with important issues: race, poverty, human exploitation, colonialism and neo-colonialism, gender and sex disparities as well as efforts to resist neoliberalism and related ideological doctrines. It is not an attempt, to *change* marketing.

Tadajewski (2016, pp. 8-15) scrutinized positive marketing and found it to be (*pace* Mittelstaedt, Kilbourne, and Shultz 2015) "at best…a minute reworking of a definition of marketing from the first chapter of an introductory textbook" (Tadajewski 2016). It is a manifestation of a desire to retain (or regain?) legitimacy for marketing.

Better Marketing for a Better World. A similar attempt to retain or regain legitimacy for marketing is the initiative known as Better Marketing for a Better World (BMBW). In their introduction to this initiative in the *Journal of Marketing* Chandy et al. (2021) began with two quotations the authors they say "reflect concerns shared by many marketing academics and practitioners … about marketing's role in creating a better world" (p. 1). Then they note, both quotations appeared in a special issue of the *Journal of Marketing* 50 years ago and, therefore, "reflect opportunities lost" (p. 1). They propose (here the nudge is explicit rather than implicit) that marketing, and marketers (academic and otherwise), must now include "persistent poverty, inequality, illiteracy, insecurity, disease, climate change, pollution, and human trafficking" in their agenda. It is a call to recognize, in their words, that "the world's current economic model is deeply flawed" (p. 2). They do not identify, however, what model they are talking about that is deeply flawed. Is it the neoliberalism of the past 50 years. Is it that, and neo-classical economics that preceded it, to which (I and others argue) marketing is tethered? What alternative economic model do they have in mind? And if "the world's current economic model is deeply flawed," isn't marketing as we know it also deeply flawed. That logic seems uncontestable.

In his scrutinization of positive marketing Tadajewski, taking a page from Spolestra and Svensson (2016), opines that we should be alert to attempts to rethink marketing through concepts that seem attuned to managerial needs, as broadened or as enlightened as they may be, rather than reflective of any substantial change in the underlying values and assumptions that frame the discipline of marketing. Like social marketing before it, positive marketing and now BMBW seem to be, more than anything else, "[a manifestation] of a desire to retain legitimacy for marketing (Tadajewski 2016)" but with "a tinge of the regressive" about them (p. 14).

Both Positive Marketing and the BMBW initiative are utilitarian in orientation: "our discipline has no shortage of talent or tools with which to address these challenges" (Chandy et al. 2021). They are extensions of a pre-existing body of common sense as a cultural system. To paraphrase the passage from Geertz, above, a marketer, even large groups of marketers, may be aesthetically

insensitive, religiously unconcerned, and unequipped to pursue formal scientific analysis, but they cannot be completely lacking in common sense and survive.

As a body of knowledge, even as extended by positive marketing and by BMBW, common sense, continuing with my paraphrase, takes the world, its objects, and its processes as being just what they seem to be and combine that the wish to act upon that world so as to bend it to one's practical purposes, to master it, or so far as that proves impossible, to adjust to it. To act, that is, upon the world—not merely accept it.

If I am correct, the next 50 years will be as disappointing as the past 50 unless "the…current economic model" is changed, unless economics as a cultural system is somehow jettisoned. That should not prevent as many of us, especially macromarketers, from doing what we can to make the world a better place.

Doing what we can. In that regard, Dholakia, Ozgun, and Atik (2020, pp. 886-889) provide, as they say, "numerous ways to escape from the determination of neoliberal hegemony" for those that wish to escape it (there are reasons many will not want to escape beyond being intellectually and emotionally enthralled by *the market*). Among the six possibilities they discuss are:

- An unabashed commitment to macromarketing and Fisk's intriguing possibility of conceptualizing marketing as a "provisioning technology." (In this regard, see Benton 2021).
- Rather than trying to preserve the liberal social order, we can consider broadening the concept of marketing but only after dislodging marketing theory and practice from the *free market economy* to which it has been indexed since the inception of discipline. (This will be more difficult than they imagine. It is in our name — *market*ing and macro*marketing*.)
- Third, a strong movement could be launched to dislodge the consumer from the false throne of sovereignty (Dholakia 2013; Schwarzkopf 2011a, 2011b). As they argue, consumers are declared *sovereign*, the earthly sons and daughters of the invisible, ethereal, omnipotent Market-God. Under the neo-classical and especially under neoliberal theology, all other life roles must pay obeisance to, be subsumed by the consumer role — or else simply be quashed by it.

  In this regard, I once asked (Benton 1987b), after noting that each of us are both producers and consumers, what elevated the consumer in us over the worker, the producer? After all, I noted, "All religious traditions place primacy of importance on work over consumption. It is only the liberal tradition of the West that has reversed the ordering and given pride of place to consumption over work" (Benton 1987b). In a more rhetorical flair I suggested, "The Book of Genesis states that man was created 'in the image of God,' in the image of the 'creator,' the 'Creator' of the Universe. It is God the Creator, not God the Consumer" (p. 242). As far as I can tell, the question did not inspire any follow up. Perhaps now is the opportunity.
- Technological innovations offer hope for developing "production-distribution-consumption methods that are not in the neoliberal thrall" (p. 887).Whether they do or not depends on the social design and the social forces which shape those innovations.

- There are intriguing prospects of digitally revitalizing quite old and established concepts and practices of such as cooperativism, of providing goods and services via cooperatives. (See, for example, Chatzidakis and Lee 2013; Compana, Chatzidakis, and Laamanen 2017; Lloveras and Quinn 2016;.)
- Finally, Dholakia, Ozgun, and Atik invoke Hutton and Heath (2020) to suggest marketing scholars consider the political nature of their research, even when it remains largely obscured.

To this list of six, I tack on a seventh.

- Macromarketing scholars can engage in recent efforts to expose the colonization of marketing knowledge and to decolonize it (Eckhardt et al. 2022; Everett 2023).

Conclusion

To conclude I can do no better than to draw attention to Firat's recent comments (2012, p. 81). Economics, either the neoclassical or neoliberal forms, serves the expansion of the market. Everything that expands the market is good; anything that hinders it is bad. Those who think that the market is simply a "mechanism" without vested interests are gravely mistaken. Maintaining and reinforcing that enlargement is inscribed in the institutional practices that constitute *modern marketing*.

It will be difficult for marketing as a cultural system to change, to loosen much less lose its hegemonic hold over global culture, even as we chip away at the margins. It will require a new "constituting imaginary that gets traction in the public's mind" (p. 81).

In terms of the present framework, marketing as a cultural system to will not change until a new economics, or whatever it is we will call it, replaces the economics we know as a cultural system. Until then, not only will economics maintain its hegemonic hold but so, too, will marketing — regardless of the tweaking we do at the margins.

Firat continues:

> For a new imaginary to get a footing, a persuasive exposé of the current human condition, along with a convincing presentation of a potential organization of life that captures the imagination, is required. As we realize and persuasively expose the fact that the market as a modern institution and marketing as its institutionalized set of practices have dominated contemporary global ideology, humanity may be able to constitute and reconstitute other institutions — institutions that may be better to serve a richer, diverse, multidimensional existence.

That is the call, the challenge, for macromarketers, albeit macromarketers with a tinge of criticality in their makeup. If we are unable to contribute to the realization and persuasively expose the market, neoliberalism, and modern marketing for what they are, we will be unable to supplant hegemonic hold modern marketing and its god, the market, has over global culture.

Notes

[1] My B.S. was in marketing at the University of Arizona, my M.A. in anthropology at Colorado State University, and my Ph.D. in economics also at Colorado State University.

[2] Chief among them was an appreciation that much of what I learned as an undergraduate business major was wrong. I recounted and discussed these experiences in a presentation made before the Colorado State University's Department of Anthropology in 2013 (Benton 2013).

[3] My own contribution is this discussion (Benton 1990) went unnoticed, although it was the first among recent contributions, beating Nelson by a year. The reason it went unnoticed, I suspect, is that I placed my paper in a book (albeit edited by a noted economist, Warren Samuels). Books do not get indexed, noticed, nor much read. My title, too, was probably too clever. It was descriptive, but meaningful only to those who already knew to what I was referring. There is a lesson here for younger scholars — be careful where you publish, seek advice (as a younger scholar, no one advised me to avoid books), and use descriptive titles with key words in the title.

[4] Nelson passed away during a conference in Finland on December 15, 2018, just six months after he and I had breakfast together in Copenhagen during which he told me he was unaware of the existence of my 1990 paper.

[5] "Ethos, World View, and the Analysis of Sacred Symbols," was first published in 1957 and is Chapter 5 in *The Interpretation of Cultures* (1973). "Religion as a Cultural System" was first published in 1966 and is Chapter 4. I recommend "The Impact of the Concept of Culture on the Concept of Man," Chapter 2, also first published in 1966.]

[6] Symbolic models work and function as metaphor works and functions. The old Aristotelian view metaphor was that it is merely *ornamental* or heuristic. New metaphor theories that have emerged since Nietzsche argue that metaphor functions cognitively, not (or at least not only) decoratively. Metaphor, once thought to be a happy extra trick with words, is now thought of by many as constitutive of perception and comprehension. Geertz is of the constitutive school.]

[7] Consider Maslow's purposes. In the 1930s and 1940s he was what, at the time, was referred to as an abnormal psychologist. His focus was on low-level neuroses. There were no explanatory models, no theories, that worked for him to explain neurosis, so he created one, *the hierarchy of needs*. The now familiar pyramid was not part of his conceptualization. It was a heuristic added later by somebody else. Nor was it Maslow's idea that a person proceeded through the various levels of needing until, if lucky, he or she reached the level of self-actualization. His idea was that a *healthy* person would satisfy all of his or her needs *all the time*. True, there would be occasions when circumstances forced a person to focus on one need to the exclusion of others (his notion of *prepotency*). If that focus and concentration on one need over all others persisted, that person was *neurotic*. That was his definition of neurosis.

[8] At the Macromarketing Conference in 2011 I invoked a passage from C. S Lewis' *Is Theology Poetry?* (Benton 2011). Lewis wrote, "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 then substituted the word *economics* for his *Christianity* to make my point. As rephrased it is: "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 that every student in every class in the nation's schools of business (and increasingly all other disciplines) sees *economics* everywhere and by it they see everything else. Is there any doubt about that?

[9] The convention today is to spell this as a single word, *worldview*, as for example in Ninian Smart's publications (1983, 1995, 1998) and in Peterson and Minton (2018). Geertz

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consistently spelled it as two words. While I adopt his convention the reader may find it both ways. That is because spell check prefers the one word version.

[10] Alfred Marshall was the 19th century British economist that brought the separate ideas of a Law of Supply and a Law of Demand together in one illustration, the now familiar graph depicting a downward sloping demand curve and an upward sloping supply curve. Being the first to illustrate these two laws economics in a single graph it is now standard, in economics, to refer to it as the *Marshallian Cross*.

[11] I agree whole heartedly with Peterson and Minton. I part company with them in their failure to recognize, or to emphasize, that marketing, too, rests on a world view. It is important to recognize when we teach marketing that we, too, are *already* teaching a world view. For a treatment of this notion, in terms of teaching environmental ethics, see Benton and Benton (2004).

[12] This is only a sketch of the argument. I deal with it extensively in "Economics and the Loss of Meaning" (1986), "A Hermeneutic Approach to Economics: If Economics is Not a Science, and If It is Not Merely Mathematics, then What Is It?" (1990), "Why Teach Environmental Ethics? Because We Already Do" (2004), "Teaching Environmental Ethics to MBA Students" (2012), and in "Environmental Ethics: Theory and Implications for Marketing" (2015).

[13] The story has been told many times. Sidney Ratner, et al., poignantly put it as follows. At least up until around 1875, the American economy was a system of decentralized economic decision making:

> A multitude of entrepreneurs made decisions about investment, output, and price in relation to their perception of the market, an institution in which Americans placed great faith. Most manufacturing firms were small in size, were organized as proprietorships or partnerships of a few men, were managed by their owners, required relatively little capital, performed a single function, produced a single product, and served local markets. Few exceptions were to be found in this pattern except in the cotton-textile industry (1979, p. 285).

Summarizing the changes that occurred over an ensuing 50-year period, they write,

> The emergence of the "mega corp," the growth of "managerial enterprise," or the "corporate revolution,"…was the most significant change in the organization of economic decision making since the development of market orientation and capitalist institutions in the Middle Ages (1979: 296).

The emergence of *marketing* occurred during this same fifty-year period. The disconnect was captured by George Brown (1951, p. 60) in his opening paragraph,

> Most economic theorists apparently conceive of the marketplace as a small open square in which producers display their wares, rent free, and to which consumers travel to inspect the offerings and to make their purchases on a cash and carry basis. In this particular world there are no brokers, no wholesalers, no retailers, no railroads, no delivery trucks, no advertising, no salesmen — in short, no marketing.

[14] In my original presentation of these bridges between economics and marketing I was remiss in omitting the obvious one: *exchange* as the core concept in marketing discourse (Firat 2020, p. 23).

[15] Similarly, John C. Narver and Ronald Savitt published a book under the title *The Marketing Economy: An Analytical Approach* (1971). At the outset they explain why they chose the

vocabulary they did. "Why call our…economy…a 'marketing economy'? Why not simply a 'market economy'?" They respond to their own question: "Choosing our words advisedly, the former term [marketing economy] distinguishes contemporary market-based economies from the name typically associated with the pure market economy of classical economic theory. "The pure market economy" is solely an analytical framework rather than a portrayal of the real world. Thus, to distinguish the real world of markets and market behavior from the classical pure market economy, we employ the term "marketing economy" (p. 3).

[16] In the summer of 1988 I was at Queens University in Kingston, Ontario, giving a talk to assembled faculty. I made reference this is juxtaposition of *the marketing concept* as a modern expression of *consumer sovereignty* and *marketing management as demand management*. In the audience was Kotler's Canadian co-author at the time, somebody named Turner I believe. At one point he objected, saying that they assume demand cannot be managed (or something like that). I remarked that I found it strange that early in their textbook they proclaim a commitment to consumer sovereignty right after so clearly indicating that the role and function of marketing is to manage demand, and then spend the next 400 or 500 pages instructing how to do it, how to influencing the level, timing and composition of that demand in a way that will help the organization achieve its objectives. Above I suggested that today it may not be necessary to remind students of the marketing concept/consumer sovereignty nexus. And I do not suggest a cause and effect relationship, but the next edition of the Kotler textbook omitted the phrase about the marketing concept being a "commitment" to the time-honored concept of "consumer sovereignty."

[17] An enterprising student or young scholar could unpack the early *marketing as exchange* literature and answer questions regarding how and why it entered the lexicon of marketing as completely as it did, and when and how it did.

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Critical Macromarketing and the Better Post-Pandemic World

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The COVID-19 pandemic has brought to light the inadequacies and pre-existing socio-economic inequalities of market society and has even further exacerbated them. One of the highlights of this crisis is that the economy has become an *end* in itself rather than a *means* to serve humanity's purposes. Another issue is the individual's predicament of being abandoned in a market society with little authority over how their lives are organized.

Using the lens of critical macromarketing, we will explore the foundations of these shortcomings and the role marketing plays in perpetuating them. We will consider the state and market dynamics and conclude by reflecting on what changes may need to occur in the conceptualization of marketing to help, rather than hinder, the reduction of structural disparities and bring about social change.

Critical Macromarketing

Macromarketing differs from traditional marketing by examining the impact of marketing systems on society, instead of just targeting individual consumers to maximize company profits. Wilkie and Moore (2006) argue that macromarketing plays a crucial role in understanding the impact of marketing on the world. It is essential for marketing to consider the environmental implications of consumerism and its impact on society and quality of life. Marketing activities and products must be designed to enhance our lives, as the world's resources are limited. If one uses them without considering the social implications, fulfilling customer demands without discretion can result in environmental degradation, reduced quality of life for consumers, and social inequality.

Hence, it is imperative to create fresh theories in macromarketing that consider critical marketing perspectives and address the ecological and social crisis to improve the human condition. Marketing is a rapidly expanding field that has a significant impact on our lives, and critical macromarketing perspectives can have a vital role in bringing novel insights to the discipline by offering both macro-level approaches and theoretical and philosophical critiques from within the field. Ultimately, this can enable marketing to attain a more holistic understanding of the intricacies in the world and contribute to the betterment of humanity. As Fırat 1985) proposed, a discipline that grows quickly, such as marketing, necessitates self-critique to guide its advancement in a more coherent and scientific manner, foster its growth, and explore new and thought-provoking avenues in the study of humankind.

Critical macromarketing emerged as a subfield that delves deeper into the power structures and exploitative forces underlying marketing systems. It investigates how these systems can lead to social and economic inequality, discrimination, oppression, "cruelty in the marketplace" (Ulusoy 2015), and environmental degradation (Kilbourne 2018), among other issues. Critical macromarketing provides a nuanced understanding of marketing systems by questioning

traditional economic models that assume consumers always make rational choices in a market-based system. This perspective recognizes that marketing practices are influenced by broader social and cultural forces, which may ultimately perpetuate inequality and oppression (Kilbourne 2018).

Marketing systems reflect and reinforce existing power structures, and focusing on individualism and consumer choice in marketing can reinforce societal and cultural values. This perspective emphasizes the need for more socially and environmentally responsible marketing practices, which may require greater collaboration among firms, government, and civil society organizations. Marketing is integrated into social structures and power dynamics, and the field recognizes its role in shaping and reinforcing broader social and cultural norms, values, and practices. Critical macromarketing challenges conventional assumptions about marketing systems by analyzing how marketing practices are shaped by and contribute to larger social, economic, and political systems and structures, such as capitalism, globalization, and consumer culture. Ultimately, critical macromarketing seeks to encourage marketing practices that benefit society as a whole.

Foundations of Market Society
The economic system that we know today as a market society is a result of modernity, according to Slater (1997). Although marketplaces existed before, they differed significantly from the modern market. These traditional marketplaces were multifunctional spaces that incorporated non-economic activities such as politics, education, and arranged marriages (Braudel 1993). They were not purely economic arenas, but rather cultural spaces. The modern market was a symbolic construct developed by the architects of modern life organization (Miller 1987). Early classical economists such as Smith (1994/1776) and Ricardo (1911/1817) envisioned the market as a space that would liberate individuals from all kinds of subjugation, whether from nature or other humans or human-made institutions (Giddens 1990). The market was seen as a place where purely economic transactions could occur without any social, political, or personal interference, freeing people from all obligations other than the resources they were exchanging.

Putnam (2016), however, suggests that economic factors alone cannot free individuals and that institutions across various cultural domains are required for individuals to realize their full potential. These institutions include science, which provides knowledge for individuals to take control of their futures; art, which enriches the spirit and allows for creative visions of the future; and morality, which ensures justice and fairness and enables the creation of a lawful existence. The three practical domains of culture are political, social, and economic, and the modern market is seen as the institutionalization of the modern principle of the economy. In this view, free market exchanges and competition would serve as mechanisms for optimization. Therefore, the modern market is regarded as the most important institution of modernity, and political, social, and economic institutions are considered necessary to balance one another and ensure the completion of modern projects (Slater and Tonkiss 2001).

Transformations on Late(r) Modernity
As modernity has progressed (Caputo and Marsh 1992), the economic domain has become more prominent, with capital representing power in contemporary society. Industrialization and economic growth have propelled capitalism to a position of global influence, and concepts such

as development, growth, freedom, affluence, and success are now closely tied to the economy. This has led to a shift from liberalism to neoliberalism as the dominant ideology (Harvey 2007), with the market exerting a hegemonic influence on human lives in the present day.

Marx (1976/1867) anticipated that economic value would become the fundamental principle of modern culture, and all aspects of human life would be organized to maximize and expand economic value (Marx 1976/1867). Today, the accumulation of economic value and the economy's overall health are the primary concerns of global political systems (Chomsky 1999). Countries have transitioned into market societies, and during the COVID-19 pandemic, the drive to protect the economy has guided policies, leading to unnecessary deaths as people returned to work out of fear of economic losses or due to losing their jobs and being unable to support themselves. As a result of an economy-focused culture, people's only means of sustaining themselves is through the market, relying on their labor as the sole resource available to them.

The individual's emancipation in a market-oriented society led to the expectation that one should take care of oneself and their family. This notion was promoted as the freedom to choose one's way of life, resulting in an individualistic culture (Dholakia and Zwick 2006) where people are vulnerable and left to fend for themselves without much guidance or support. This approach drains individuals' energy, leaving them with insufficient resources to care for others. The consequences of economic downturns, such as job loss, have a significant impact on them. This was evident during the COVID-19 pandemic. Individuals lack the authority or influence to shape policies that affect their lives and livelihoods.

Recognizing Roadblocks
Numerous factors hinder change in the aforementioned circumstances, with corporate interests controlling government policies being a significant obstacle. This control is exerted through financial resources in politics and corporate representatives having a majority in government agency decision-making committees (Van Cleave 2019). These conditions constitute a powerful force that is challenging to overcome. The market economy and consumer culture, backed by the same corporate interests, have become an unstoppable force in modern society (Toynbee and Walker 2017). Despite its original purpose of fulfilling society's needs, marketing has played a role in developing these conditions (Alderson and Martin 1965). The discipline shifted its focus to exchange as the central concept of marketing, driven by managerial and business interests (Bagozzi 1975). Consequently, the discipline's focus shifted from people's interests to the interests of market growth, perpetuating the existing system.

Marketing is often said to exist for the purpose of satisfying demand, but organizations are reluctant to fulfill needs until there is effective demand, which requires purchasing power. Many individuals experiencing hunger, famine, illness, and other hardships display demand by going to great lengths to seek relief, but this demand is often not on the radar of marketing organizations. Rather than providing necessary resources, such as food, much of it is wasted by being dumped into the ocean (Cornil, Hoegg, and Mookerjee 2021). As a result, charities and aid organizations must step in to fill the gap, but they often fall short due to inadequate resources. Marketing organizations justify their inaction by claiming that they need to remain profitable to continue providing products to the market, and that profits are necessary to incentivize entrepreneurs to undertake the risk and effort of running businesses. This reasoning stems from the capitalist

organization of market society, which has historically led to economic growth and worldwide power. However, this logic ignores the inequalities and worldwide suffering that have also arisen as a result.

However, it is important to note that humans are not solely driven by profit, economic wealth, or power. Examples of individuals like Gandhi, Martin Luther King, and Rosa Parks and mass movements advocating for the less fortunate prove that there are other incentives that drive us. Blindly adhering to a single ideology, particularly when it has negative consequences, is a major flaw in the human experience. We should have more faith in human capacity for critical thinking and innovation, as history has shown us. Critics such as Baudrillard (1988) and Deleuze and Guattari (1987) have pointed out the fallacy of these concepts. As social beings (Cameron 1973) with a symbolic existence (Levy-Strauss 1963), individuals may rely heavily on others and culture to shape their desires.

Consumers and marketing organizations are closely intertwined in shaping the complex nature of desire. Cultural influences, largely shaped by marketing institutions, heavily impact the formation of individual desires. These modern institutions are responsible for identifying existing and potential desires through trend and disruption analyses, while also organizing production and promoting certain lifestyles. In order to achieve social change and reduce structural disparities and marketplace discrimination following the COVID-19 pandemic, it is essential to rethink marketing concepts. Novel marketing approaches must be developed to address these issues and promote a more equitable future.

Rethinking Marketing for a Better Post-Pandemic World
By using a critical macromarketing framework to promote diversity, inclusivity, and awareness of social issues, marketing can help reduce structural disparities and marketplace discrimination and drive social change. The COVID-19 pandemic, for instance, has brought to light the already existing discrepancies and prejudicial treatment in society, which predominantly affect low-income communities, individuals of color, and women (Bailey 2020; Ostry, Loungani, and Furceri 2020). From a critical macromarketing lens, several key state and market dynamics can help reduce structural disparities and marketplace discrimination and thus drive social change in a post-pandemic world. In order to establish a fair and just society in the aftermath of the pandemic, it is crucial to encourage diversity, inclusivity, and cultural programs through marketing efforts. While the government enacts policies and regulations to support marginalized groups, the market commits to reducing discrimination and advocating for social justice.

To create a better post-pandemic world, a combination of government and market efforts must prioritize social and economic fairness. This initiative should involve investing in education, supporting small businesses and entrepreneurship, implementing progressive taxation, strong regulations and enforcement, green technology and infrastructure, and international cooperation. Ultimately, the critical macromarketing perspective stresses the importance of a systemic approach to these issues, promoting fairness, inclusivity, diversity, sustainability, proactive government intervention, and participatory decision-making.

In order to construct a marketing logic that can contribute to building a better world post-pandemic, it is essential to openly acknowledge the limitations of modern marketing and face

uncomfortable truths without hesitation. One such truth is that individual success and security cannot be guaranteed if a culture that perpetuates insecurity and failure exists. Without a culture that promotes collective commitment to preventing failure and insecurity, even those who are currently affluent and well-resourced are at risk of falling into desperation. Until people recognize this reality and are dedicated to caring for those who are struggling, we will all be susceptible to desperation, conflict, and destruction, which will persist indefinitely.

What implications do these inevitabilities hold for the type of marketing that is necessary? Firstly, marketing must play a role in constructing and integrating into a culture that values compassion and empathy towards others. Secondly, it should dissociate itself from purely economic objectives and develop a comprehensive, multi-dimensional cultural perspective. Traditional marketing approaches are inadequate when addressing public health concerns (Jongenelis and Pettigrew 2016). The literature suggests various proposals for marketing, such as "embedded marketing" (Dholakia and Fırat 2006) and "constructive engagement" (Shultz 2007), both of which envision marketing as an active participant in communities and an equal partner in finding solutions to challenges they may encounter. Constructive engagement positions marketing as a separate agency, providing expertise and know-how, while embedded marketing views the field as an intrinsic part of the community, responding to observed desires and contributing to the construction of desired outcomes.

Marketing plays a significant role in creating desire and treating it as a set of practices related to consumption could reinforce an illusion that serves the interests of dominant players in contemporary market societies. Moreover, when we see marketing institutions as distinct from the individuals who crave their products and define their identity as mere "consumers," we strip people of their agency to make decisions beyond the limited choices presented to them by the market (Dholakia and Fırat 2017). Rather than being mere consumers, people must have the authority, as members of communities, to decide what is offered for consumption in the market and beyond.

The construction of desires is a cultural process that involves all members of society and reflects a power structure. Therefore, marketing should focus on understanding how desires are formed, spread, institutionalized, and satisfied under various circumstances and contexts, rather than solely on promoting and organizing exchanges. As beings that seek and create meaning (Nancy 2000), humans should have access to multiple forms of meaning, rather than being restricted to only economic value, which is the predominant form of meaning in contemporary market society.

Marketing should contribute to building a culture that values caring for others. Trying to reduce structural disparities and marketplace discrimination by creating systems of provisioning based on market exchange is futile in a culture where many lack valuable resources. Instead, we need a new marketing framework that is revolutionary in its conceptualization to promote and achieve a better world.

Conclusion
The concept of critical macromarketing challenges the dominant marketing discourse and advocates for the inclusion of social and environmental concerns in marketing practices. This

approach stresses the importance of education and alternative economic organization to create a more equal distribution of resources in the market, and it supports social justice and sustainability in marketing activities. Critical micromarketing helps us explore the societal implications of marketing practices on a macro level and highlights the role of marketing in shaping social and cultural norms. More specifically, it examines the potential positive and negative impacts of marketing activities on society, the drawbacks of a market society, and the relationship between state and market dynamics and marketing practices and outcomes.

The article suggests several strategies to promote responsible and sustainable marketing and social justice. These include emphasizing value creation and experiences as a community, collaborating with all stakeholders, promoting diversity and inclusion, and fostering collaboration between the state and the market. Ultimately, the article underscores the need for a long-term commitment to diversity, inclusion, and social justice to achieve these goals. In conclusion, the article advocates for a critical macromarketing approach that takes into account the broader social and cultural context in which marketing occurs. It stresses the importance of considering the potential positive and negative impacts of marketing activities on society and calls for critical reflection and reform of structures and institutions to mitigate negative effects and prioritize social, cultural and environmental considerations.

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The U.S. Government's Program of Welfare for the Wealthy

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Introduction

Recently there has been a fair amount of discussion about the degree and the extent of income and wealth inequality in the United States (Atkinson 2015; Baker 2016; Benton 2022; Blawatt 2022; Greig, Hulme, and Mark 2007; *passim.*). There have also been assertions to the contrary, that inequality is less than it seems (Early and Gramm 2018; Gramm, Ekelund, and Early 2022; Kalinowski 2012;). In their push to improve the functioning of the macromarketing system as a whole it is important that macromarketers understand how inequality affects the way people think, how they live, and how they die (Payne 2017). It is also important that they understand the source and sources of that inequality. To do so, however, macromarketers must breach the high wall that academics place between the disciplines. [1]

In the context of the present session on Government's Role in the Macromarketing System, it is important to grasp how the government impacts the degree of inequality—or serves to correct it. Put another way, is it a government of the people, by the people, and for the people, or is it a government that negatively impacts the nation's already very large income inequality?

The United States prides itself on being governed by the rule of law, as do other liberal democracies. The present paper discusses how, beginning in the 1970s, the law has been used by certain parties—let's call them the power elite and the rich—to regain the incomes and wealth that they had lost between the 1920 and the 1970s, income and wealth they feel was rightfully theirs.

From the late 1940s to the mid-1970s, ordinary people in the United States enjoyed a tremendous increase in their prosperity. It was the highest level of prosperity the world had ever experienced, and it resulted in the creation of the great American middle class. That period was followed by four decades which witnessed the destruction of that great American middle class, a development caused, in part, by the vast income inequality between management and their workers that emerged in the 1970s and continued, relentlessly, for the next 40-50 years. The present paper argues that the U.S. Government was an instigator, perhaps the major instigator, of that growing income inequality.

Much of what happens in government occurs behind the scenes, in the dark, such that the citizenry is deprived of accurate information about matters of importance to them. On such occasions, typically a special interest group influences government to do something that favors its welfare, often at the expense of the welfare of others. At other times the special interest group convinces government to *not* do something that would prevent the special interests from

benefiting from an already enacted rule or law, one that is already beneficial to the special interests, but harmful to others. We refer to such activities as *stealth* activities of the U.S. Government working against the general welfare of the American people. From 1970 to 2010 there were at least 17 occasions when the U.S. Government acted in this manner.

This paper describes how, from the 1970s to the decade of the 2000s, the U.S. Government enacted its Program of Welfare for the Wealthy.

Background: The Creation of the Great American Middle Class

> The test of our progress is not whether we add more to the abundance of those who have much; it is whether we provide enough for those who have too little.
>> Franklin D. Roosevelt
>> Second Inaugural Address, 1937

In the late 1920s, before the onset of the Great Depression of the 1930s, the top one percent of the U.S. population claimed about 23.9 percent of the income earned by all of the people in the U.S. The other 99 percent of the population claimed the remaining 76.1 percent of the nation's income.

That is, in the late 1920s the top one percent of the population earned almost one-fourth of the nation's income while, on average, each one percent of the remaining population was claiming only about 0.77 percent of the nation's earnings (see Figure 1).

Figure 1. Share of the U.S. Income Going to the Top One Percent, 1913 to 2007.

Source: Robert B. Reich, "The Limping Middle Class," *New York Times,* September 4, 2011, page SR 6.
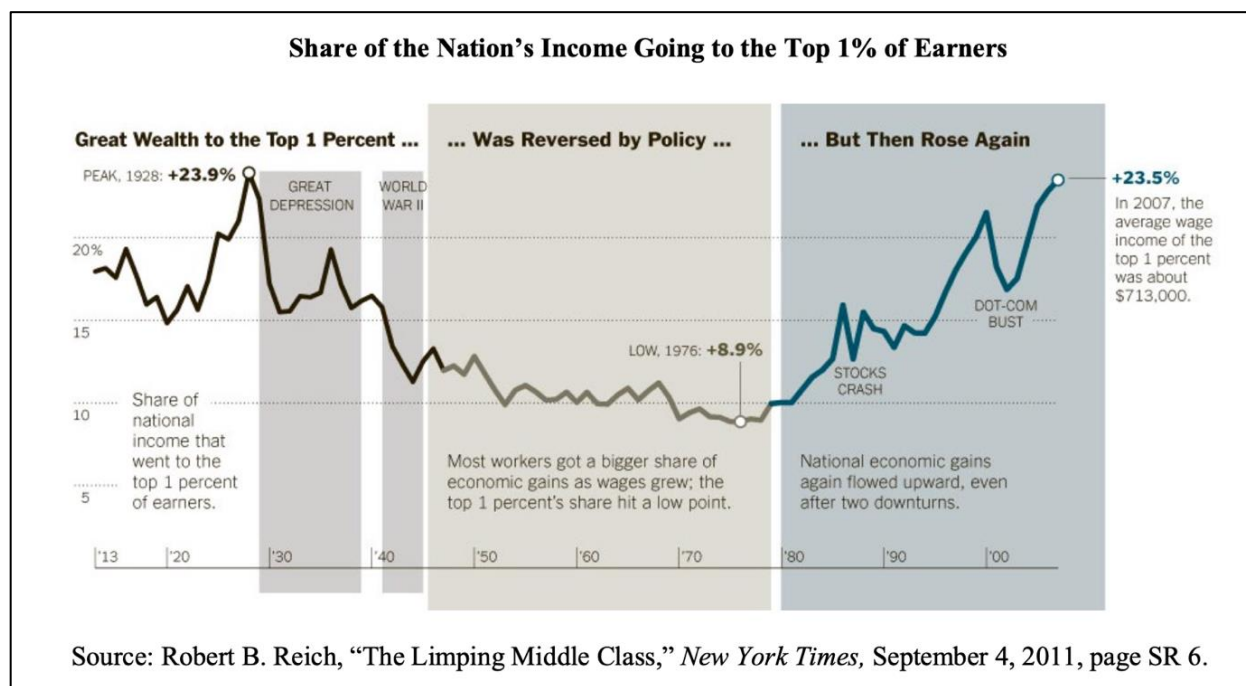
Franklin Delano Roosevelt and Harry Truman, presidents of the United States from 1933 to 1953, legitimized labor unions. This strongly encouraged workers to form and join labor unions at their places of employment, which they did in great numbers from the mid-1930s to the 1950s. This resulted in their receiving better wages, benefits and working conditions than before. Figure two, below, shows that as union membership increased significantly in the 1930s – 1950s, the share of the nation's income going to the top one percent of the population fell into a long decline from the 1930s to the mid-1970s. Furthermore, because non-unionized businesses had to offer competitive wages and benefits, this prosperity extended to millions of other workers from the late 1940s into the 1970s and 1980s (see Figure 2).

Figure 2. Union Membership and U.S. Income Share of the Top One Percent.
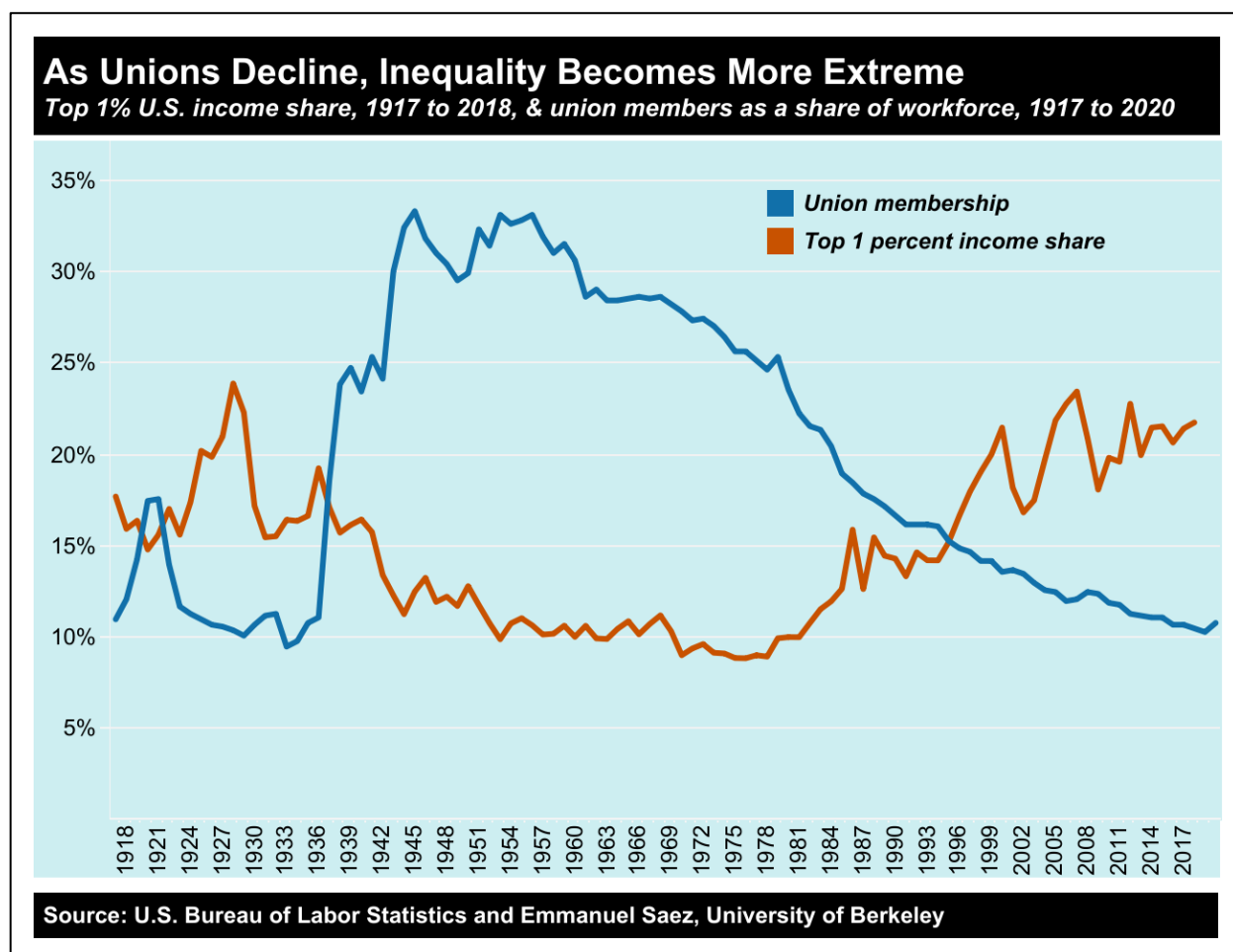
(Source: *Income Inequality*, a project of the Institute for Policy Studies. (Available at https://inequality.org/facts/income-inequality/) (last accessed February 22, 2023).

The result of that prosperity was that, by 1976, the top one percent of the population claimed only 8.9 percent of the nation's earnings, down from 23.9 percent in the late 1920s, while the remaining 99 percent of the population claimed the other 91.1 percent of the nation's earnings, up from 76.1 percent. On average, each one percent of the bottom 99 percent of the population claimed about 0.92 percent of the nation's earnings.

Table 1, below, combines these statistics from the late 1920s and 1976. Compared with the late 1920s, the 1976 numbers clearly indicate that the nation's income was being distributed more evenly across the entire working population. The great American middle class had been created!

Table 1. Income distribution, late 1920s compared with 1976.

Population Segment	Late 1920s	1976	1920 –1976 Difference
Top 1 Percent	23.9 Percent	8.9 Percent	- 15.0 Percent
Middle 1 Percent	0.77 Percent	0.92 Percent	+ 0.15 Percent

The Destruction of the Middle Class. [2]

> The progressive, populist tendencies that entered the US polity after the Great Depression did not last long. With a few lulls such as the 1960s Great Society program of President Lyndon B. Johnson, the American political economy of [the] rest of the 20th century and the early part of the 21st century was one of whittling down the New Deal programs.
> Dholakia, Ozgun, and Atik (2021, p. 871)

The Business Community, the Republican Party, and Conservative Democrats joined together in a strong faction to regain the wealth status they enjoyed in the 1920s and before.

By the 1970s, the business community and the Republican Party, along with conservative Democrats, decided to fight to regain the incomes and wealth they had lost. To succeed in that fight, the faction would first have to destroy or severely weaken the power that labor unions had acquired during the Roosevelt and Truman administrations. This section describes six important actions the faction took in their effort to destroy the power of labor unions and regain the wealth they believed rightfully belonged to them.

- In 1947 Congress passed the Taft-Hartley Act, a very harsh, anti-union law.

- In the late 1950s, President Eisenhower supported passage of the Landrum-Griffin Act, the harshest law against labor unions since the passage of the Taft-Hartley Act.
- In 1965 the business community/Republican Party/conservative Democrats faction successfully prevented President Lyndon Johnson's and the Democratic Party's attempt to reform the Taft-Hartley Act. Johnson won the 1964 election by a wide margin, and the Democrats won both houses of Congress (by 68 to 32 in the Senate, and by 295 to 140 in the House). With their substantial victory at the polls, Johnson and Congressional Democrats tried to repeal the most blatantly anti-labor portions of the Taft-Hartley Act. However, Republicans in the Senate were joined by enough conservative southern Democrats to sustain a filibuster of the proposed reform legislation.
- In the 1970s the business community made a big move to regain its influence in Washington. In 1970 the New York-based National Association of Manufacturers moved its headquarters to Washington, D.C. Because New York City was the country's center of business, the organization had been headquartered there. But the interrelationship of business with business was no longer considered as important as the interrelationship of business with government. The chief executives of America's top 200 corporations formed the Business Roundtable, and it, too, moved to Washington. The National Federation of Independent Businesses, with a half a million members, also moved to Washington. So did the U.S. Chamber of Commerce, the National Association of Wholesalers-Retailers, and the National Restaurant Association. These were the big six business associations and they relocated to Washington to form an extremely powerful force to lobby for their own special interests.

  From the late 1970s throughout the 1980s, these groups increased their spending on congressional elections some five hundred percent. By the late 1970s these groups had hired such a large force of lobbyists that, when combined, they had *130 lobbyists for each of the 535 members of Congress*. The result of this lobbying effort was that the anti-business Congress of the early 1970s became the pro-business Congress of the late 1970s.

  By 1984, these lobbyists had established a powerful reputation: "When business really tries, when it is fully united and raring to go, it never loses a big battle in Washington" (Noah 2012, p. 108).
- In the mid-1970s Republican President Gerald Ford vetoed two bills that would have strongly benefitted ordinary consumers and labor unions.
- In 1978 the Democrats in Congress were pushing another bill that would support labor unions when confronted by the Taft-Hartley law. Because the bill would have passed the Senate if it came up for a vote, two Republican Senators, Orrin Hatch of Utah and Richard Lugar of Indiana, offered one amendment after another, until the number of amendments eventually totaled almost one thousand. After five weeks of such delaying tactics, three votes were finally taken to end the filibuster. The closest vote favoring ending the filibuster was 58 – 41, two short of the needed 60 votes. A noted historian called this defeat a Waterloo for labor (Pizzigati 2012).

Did these actions weaken labor unions? Four observations clearly indicate that they were very effective in greatly weakening the power of unions.

a) The effectiveness of labor union activities reached its zenith in about 1976, when the bottom 99 percent of workers received 91.1 percent of the nation's income. After 1976, that 91.1 percentage constantly trended downward, and by 2010, was only 75 percent.
b) The bottom 99 percent of workers were able to achieve the rewards noted above because, from the late 1930s to the 1960s-1970s, union membership continued to grow until about 33-34 percent of workers in the U.S. were union members. After that, union membership went into a steady decline until 2010, when only 10-12 percent of U.S. workers were union members.
c) After the business community moved to Washington in the 1970s, it had thousands of lobbyists doing their bidding. Labor unions could not afford an army of lobbyists who were strong enough to compete with the business-community's lobbyist force.
d) Once the power of labor unions had been significantly weakened, the U.S. Government proceeded to utilize what we call *stealth government actions* to create its Program of Welfare for the Wealthy.

Stealth government actions in the 1970s
There were four stealth government actions during the 1970s, two undertaken by Congress and two facilitated by Supreme Court decisions.
1. Student loans guaranteed by the government rewarded bankers at the expense of students. In the 1972 student loan program established under Sallie Mae, the government did not lend money directly to students. Banks made the loans, and the government guaranteed the loans. The banks took absolutely no risk. Banks could borrow money from the Federal Reserve at low interest rates and lend that money to students at substantially higher interest rates. President Clinton tried to change the system to one where students borrowed directly from the government. Congress prevented that approach. The net effect was that Congress passed laws that forced students to pay higher interest rates on their loans than they would have, had there been available a system of direct-government loans.
2. The new bankruptcy law of 1978 strongly favored management over workers. In 1978 Congress passed a little-noticed bankruptcy law that greatly shifted legal power in bankruptcy cases away from the courts and the public, giving that power to the management of the company declaring bankruptcy. Instead of ousting the company's management and replacing them with an outside bankruptcy trustee (as had been common practice), the new law not only left the old management in place, but also allowed them to mastermind the entire bankruptcy process. This new law permitted the old management to shed old debts and abrogate long-standing labors union contracts that had guaranteed wages, health benefits, and lifetime pensions. Thus, management was empowered to deprive rank-and-file employees of millions of dollars in hard-won economic gains.
3. Supreme Court decisions in the late 1960s made all labor union strikes illegal. Labor disputes now had to submit to arbitration. The Norris-LaGuardia Act of 1932, among other things, barred federal courts from issuing injunctions to prevent strikes, picketing, or boycotts by labor groups. It also prohibited contractual agreements in which an employee agreed, *as a condition of employment*, to not join a union while employed by the company. In a 1969 case (the *Boys Market* case), the Supreme Court decided that it would begin to issue injunctions to enforce no-strike clauses in labor contracts. The Court

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then went even further. It would imply no strike clauses even if no such clause existed. The Court reasoned that labor unions did not need strikes anymore, and that everything could be decided by a neutral arbitrator. With these decision, the Supreme Court declared strikes illegal, thus denying unions the use of their most powerful weapon in their struggle to improve workers' conditions.

4. A 1978 Supreme Court decision allowed banks to charge high credit card interest rates for low-income credit card holders. In Marquette National Bank of Minneapolis *v*. First of Omaha Service Corp., the Court invalidated the use of a state's anti-usury law against nationally-chartered banks. Those laws were designed to prohibit banks from charging excessively high interest rates. That decision effectively deregulated credit cards interest rates. Banks could now charge 30 percent interest to people who previously could not qualify for a bank loan because they were too high a risk.

   Because of that decision, Citicorp decided to move its credit card operations to South Dakota. To do so, it had to convince the Governor of South Dakota to persuade that state's legislature to formally invite Citicorp to operate there, as required by federal law. The Governor then successfully lobbied the legislature to pass a bill to repeal the state's cap on interest rates. That done, Citicorp then moved its entire credit card operation to South Dakota. Citicorp then began to aggressively market their high-interest rate cards to customers who carried large balances but rarely paid more than the monthly minimum. Other banks soon followed the Citicorp–South Dakota model.

Stealth government actions in the 1980s
There were four stealth government actions in this decade, three by President Ronald Reagan's administration, one by Congress.

5. The Reagan presidency allowed corporations to replace pension plans with 401(k) plans, thus greatly reducing the retirement incomes of millions of middle- and lower-class workers. In 1981 the Reagan Treasury Department, without specific legislation passed by Congress and signed by the president, ruled that a tax provision allowing the use of 401(k) plans—narrowly intended for a dozen or so New York state corporations—could be applied across the nation. As a result, the percentage of large and medium-sized American firms that offered traditional lifetime pensions fell from 83 percent in 1980 to 28 percent in 2011.

   In the old system, employers put up 89 percent of the money for retirement, while the employees only contributed 11 percent. Under the 401(k) system, the employees now paid 51 percent of the cost of the system, while the employers paid 49 percent. Under the old system, companies' guaranteed monthly retirement checks to employees for as long as they lived. Under the 401(k) system, it was now up to employees to provide for their own retirement savings and to manage their money for long-term security, a task beyond the capability of millions, as the record now shows.

6. The Reagan administration allowed corporations to buy back their own company stock. In effect, when buying back their own company stock the CEOs were stealing money from current stockholders because their stock options devalued the stocks currently held by stockholders. Prior to 1982, a corporation's repurchase of their own stock was considered an attempt to manipulate the company's stock price. Doing so was illegal, and

had been for decades. In 1982, under Reagan, the Securities and Exchange Commission (SEC) adopted rule 10b-18, the result of which was that a corporation's repurchasing of its own stock *was no longer an illegal act*. By making this change, the SEC ceased to be a stock regulator, as decreed by law, and, instead, became an active promoter of stock price manipulation.

7. Congress passed the Garn-St. Germain Act and eliminated three important banking regulations, the absence of which contributed to the nation's subprime housing mortgage crisis that culminated in the financial crash of 2007-2008. In 1982 Congress passed the Garn-St. Germain Act, which basically deregulated the savings and loan industry. The Act allowed thrifts (i.e., savings and loans associations) to increase the interest rates they offered savers in order to attract more savers, as well as more deposits from each saver. The thrifts could then use the extra deposits to make speculative investments, which previously they had not been permitted to do. Due to the poor investments they made, several thousand thrifts failed in the 1986-2002 period. That created a shortage of mortgage-lending institutions (i.e., lenders), a shortage that was quickly filled by newly emerging mortgage-writing companies, which were both unregulated and unscrupulous.

   Also in the early 1980s, through the Secondary Mortgage Market Enhancement Act, Congress (1) abolished usury interest rates on mortgages and the requirement of a down payment when buying a home, (2) allowed banks to offer adjustable-rate mortgages to financially unqualified individuals, and (3) allowed the securitization of those mortgages on the secondary market, even though they were of very questionable quality. This was the start of the "subprime mortgages" market.

   Because of these deregulations, lenders sold their subprime mortgages to investment banks like Goldman Sachs, who securitized them and sold them as high-quality securities to private individuals and pension funds that expected to receive a high rate of return on their purchases. Lenders used that new source of income (reselling their subprime mortgages to investment banks) to again begin issuing adjustable-rate mortgages to financially unqualified individuals, thus starting the cycle all over again.

   From the very beginning, these home mortgages were loaded "with poisonous features that made them virtually impossible to repay" (Smith 2012). When those home buyers began to default on their mortgages in the early 2000s, they lost most or all of the investments they had made in their homes. Individuals or pension funds that had purchased those securitized mortgages as good investments also lost most or all of their investments. During the decade of the 2000s, those subprime mortgage foreclosures occurred with increasingly greater frequency, and that caused the financial crisis of 2007-2008.

8. Reagan and Republicans aligned themselves with the ultraconservative Federalist Society to identify young, prospective Supreme Court nominees who strongly embraced very conservative political ideals, while avoiding the nomination of candidates who might have liberal tendencies.

   From President Reagan's point of view, the federal judiciary system was no longer meant to be politically independent—that is, be one of the three equal branches of government.

Instead, it was to become a legal force aligned with and supporting the Republican Party. To accomplish his goal, Reagan decided that the source of these future Republican-friendly Supreme Court justices was to be the Federalist Society.

All Federalist Society members were libertarians who strongly opposed government programs like Social Security, Medicare, and Medicaid. They also opposed legal abortions, governmental regulation of private industry, and other popular initiatives like progressive income taxes.

Consider the last four Republican presidents and the eight individuals they appointed to the Supreme Court. Almost all were Catholic and members of the Federalist Society. Ronald Reagan appointed both Antonin Scalia and Anthony Kennedy. George Herbert Walker Bush appointed Clarence Thomas. George W. Bush appointed John Roberts and Samuel Alito. Donald Trump appointed Neil Gorsuch, Amy Coney Barrett, and Brett Kavanaugh. Kavanaugh was raised Catholic, although now embraced the Episcopalian faith. Kennedy, while very conservative, was not a member of the Federalist Society.

By the end of the George W. Bush presidency (2008), the pro-business/anti-common worker bias of this Republicanized Supreme Court (e.g. Scalia, Alito, Thomas, Kennedy, and Roberts) was evident in the Court's decisions (1) in the halting of the Florida recount of votes in the Bush vs. Gore presidential election of 2000 (reflecting a strong business bias), (2) in the Lilly Ledbetter case (indicating a strong favoritism for big business and a very strong bias against women and common workers), and (3) in the Citizens United case, which allowed corporations and very wealthy people to make unlimited political campaign contributions that benefitted their favorite candidates. Because of the financial freedom given to corporations and wealthy individuals by the Citizens United decision, the historical one man, one vote principle no longer applied to those in the top three or four percent of earners. The rich person's ability to influence the political system was now much, much stronger than the working man's ability to do so.

Stealth government action in the 1990s
Democrat Bill Clinton was president of the United States from 1993 to 2000. There were three stealth government actions taken in the 1990s. Two were initiated by Congress, one by the Supreme Court.

9. Congress encouraged a substantial increase in use of stock options to dramatically increase CEO compensation and cause even greater income inequality. From 1990 to 2001, CEO annual compensation grew about 400 percent. To a great extent, that growth was due to the use of stock-option grants as a form of executive compensation.

   On average, in the early 1990s, stock options only represented about 20 percent of an executive's compensation. Twenty years later that figure tripled to about 60 percent. In 1980, only about 30 percent of CEOs had been granted company stock options. By 1994, 70 percent were receiving options. By 2000, mega-option grants of millions of shares or more had become the norm (Smith 2012).

   The use of stock options was controversial because they were not treated as an expense in the company's accounting system. As a consequence, when CEOs exercised their stock

options, they represented transfers of wealth from the shareholders of the company's stock to corporate executives. Since such transfers of wealth occurred without the permission of the shareholders, they were illegal.

In 1993 the quasi-regulatory Financial Accounting Standards Board (FASB) announced that it intended (1) to rule that stock options were illegal because "failing to charge options as a business expense was deceptive accounting" (Smith 2012). Congress quickly came to the rescue of corporate America the following year (1994), when the Senate voted 88-9 in favor of a resolution that condemned the FASB's proposed actions as reckless. Fearful that Congress would eliminate the FASB and reduce funding for the Securities and Exchange Commission, the chairperson of the SEC directed the FASB to withdraw its proposed ruling. That Senate resolution presented CEOs with another ten years of bountiful wealth.

10. Congress excluded waitresses and waiters when it increased the federal minimum wage, thus relegating them to poverty or near-poverty incomes. In the early 1960s, the National Restaurant Association persuaded Congress not to give any minimum wage protection to waitresses and waiters. Those workers would have to live only on the tips they received at work. That changed in 1966, when the minimum wage for waitresses and waiters was set at 50 percent of the minimum wage for other workers. From 1966 to 1996 the tipped wages for waitresses and waiters varied between 50 and 60 percent of the regular minimum wage. In 1996, the Republican-led Congress again raised the minimum wage for regular workers, but that raise did not apply to waitresses and waiters.

11. The Supreme Court allowed forced arbitration clauses in consumer contracts to prevent class action lawsuits against corporations. When consumers sign a credit card contract, a cellphone agreement, or a cable television contract, the contract's fine print is likely to include a forced arbitration clause. By signing such a contract or agreement, such consumers give up the right to join with other like consumers in a class action lawsuit against the company issuing the contract. Instead, if they believe the company is being unfair, dishonest, or doing something illegal, they must hire a lawyer and enter into individual arbitration with the company. Since the financial reward for any consumer, if they win the arbitration, is likely to be less than the legal fees incurred, there is no incentive for the consumer to enter into such a legal action.

Forced arbitration clauses in a company's contract typically cost customers several dollars a month. If there are hundreds of thousands of contract signees, those relatively small monthly amounts may total in the millions. Over the course of a year, they may total in the tens of millions of dollars. By including such clauses in their contracts, companies reap great financial benefits, but they are not subject to costly class action lawsuits because of their unfair, dishonest, or illegal practices. The use of forced arbitration clauses was well-established in the late 1990s, and the Supreme Court legalized the practice in *ATT v. Concepcion.*

Stealth government actions in the 2000s
George W. Bush was president from 2001 to 2009, and the Republicans controlled Congress from 1994 until 2006. There were six stealth government actions during this decade: one was initiated by President Clinton and supported by Congress; two were initiated by President

George W. Bush and supported by Congress; two were initiated by Congress and supported by President Bush; one was supported by both Congress and President Bush.

12. The business community helped President George W. Bush pass tax cuts for the rich. In 1993 President Clinton instituted a tax increase on the rich, and it was one of the major forces that resulted in the economic prosperity of the mid-to-late 1990s. For the first time in over 30 years, the U.S. Government's budget showed a surplus. In fact, it showed a surplus in four straight years, 1998 through 2001, the year that George W. Bush became president. (At the time, economists reported that, if the current economic policies remained unchanged, the federal budget would be in surplus for years to come, and that the entire national debt would be completely eliminated sometime around 2010.)

In January 2001, George W. Bush became president when the Supreme Court intervened in the controversial state of Florida vote recount. In February 2001, President Bush promised Congress he would eliminate $2 trillion from the national debt over the next decade. Referring to the recent budget surpluses, Bush also said, "the people of America are being overcharged" (Marcus 2012) and that, therefore, it was appropriate to give them a tax cut. Republicans had a small margin of control in the House of Representatives at the time, but there was a 50-50 tie in the Senate. As a result, Bush's proposed tax cuts were likely to be stopped by a Democratic filibuster in the Senate.

Smith (2012) described how the business community assisted Republicans in getting this tax-cut bill through Congress. Tax policy, Smith also noted, is "a highly technical realm that is ripe for concealment and mystification" (Smith 2012) and the Gang of Six and the Bush White House were not above exploiting public confusion or gullibility. (The Gang of Six refers to the business community's six top lobbyist groups: the National Association of Manufacturers, the U.S. Chamber of Commerce, the Business Roundtable—CEOs of the top 200 corporations, the National Federation of Independent Businesses, the National Association of Distributors-Wholesalers, and the National Restaurant Association.) The Democrats warned that 43 percent of the tax cut would go to the top one percent of the income scale. But the White House highlighted the promise of a quick rebate for the average taxpayer—$300 for single people and $600 for couples. That pitch masked the larger truth that, as the years rolled on, the lion's share of the tax cuts would go to the super-rich.

With the full-court press by the Gang of Six reinforcing the White House push, the Bush bill offering $1.35 billion in tax cuts over a decade passed the House 240-154. In the Senate, Republicans sidestepped a Democratic filibuster by invoking the process of budget reconciliation—which required them to guarantee there would be no loss in revenue, an impossibility with such a huge tax cut. The Republican majority ignored that requirement, and the looming deficits, and passed the bill 58-33 (Smith 2012).

If 43 percent of $1.35 billion ($580 million) went to the top 1.0 percent of citizens, the remaining 99 percent of citizens received only $770 million. On average, then, any 1.0 percent portion of the middle-lower income citizenry received only $7.8 million ($770 million/99 percent = $7.8 million), while the top 1.0 percent received $580 million. That

ratio, $580 million-to-$7.8 million, is 74 to 1 in favor of the rich. This stealth action is a very good example of the U.S. Government's program of welfare for the wealthy.

13. A new treaty, passed by Congress, greatly facilitated outsourcing U.S. manufacturing jobs to China and increasing imports from China. Prior to 2000, U.S. trade with China was based on, and limited to, annual agreements between the two countries: that is, a new agreement was negotiated each year. Because that arrangement did not allow for the establishment of longer-term relationships between U.S. and Chinese companies, the business community put pressure on Washington to make appropriate changes. Business people argued that freer trade with China (that is, longer-term trade agreements with China) would result in an export bonanza from which all Americans would benefit.

    President Clinton strongly supported the U.S.-China Relations Act, which passed the House in May 2000. He argued that the agreement would open up China to all of America's products, "everything from corn to chemicals to computers," the Republican candidate for president, George W. Bush, further declared that it would "open markets to American products and help export American values." The U.S. trade representative proclaimed that it represented broad export potential "across all sectors and all fields of a magnitude unprecedented in the modern era." The Business Roundtable lobbied Congress for its support and envisioned massive export gains in its advertisement: "A New trade agreement opens China's market to our goods and services." A number of U.S. industries jumped on the bandwagon in support of the treaty, including automobiles, farm equipment, telecommunications, pharmaceuticals, and electronics. (All quotations are from Smith 2012).

    But organized labor was opposed to the treaty, believing that it would lead to massive job losses at home as U.S. companies would move factories to China to take advantage of China's cheap labor. Smaller U.S. manufacturing firms feared that big U.S. companies would use their China advantage to crush them by producing cheap goods there and exporting them back home.

    As U.S. trade with China increased year-by-year after 2000, so also did unemployment in the U.S. manufacturing sector. From 2000 to 2010, employment in the U.S. manufacturing sector declined by some 33-34 percent. Many of those who lost high-paying jobs in manufacturing had to settle for lower-paying jobs in the service sector, or worse. Meanwhile, owners and executives of U.S. firms that were involved in outsourcing U.S. jobs to China were rewarded with significantly greater compensation, leading to even further increases in the nation's income inequality. For example, reportedly the "six Walmart heirs were worth as much as the bottom 41 percent of American households put together" (Kristoff 2014).

14. Congress and President George W. Bush allowed employers to steal billions of dollars from their employees through legalized wage theft. First passed in 1938, the Fair Labor Standards Act required that certain hourly workers be paid time-and-a-half for hours worked beyond the standard forty-hour work week. The act did not apply to salaried managers and executives.

Under this law, workers would be entitled to time-and-a-half overtime pay if they earned less than $460 per week ($11.50 per hour, or $23,600). If they earned $460 or more a week they would not be entitled to overtime pay no matter how many hours worked. (If that 1975 salary level ($23,660) had been regularly updated to reflect the effect of inflation since 1975, the newly adjusted salary figure would be in excess of $52,000 per year. If such a change had been made, at least 5 million, and perhaps as many as 10 million more workers would have been eligible for overtime pay over those many years.)

By changing the law in 2004 to reclassify many ordinary workers as executives, Congress and President George W. Bush legalized, and encouraged, wage theft that denied millions of workers of billions of dollars of overtime pay that was due to them according to the Fair Labor Standards Act of 1938.

15. In 2005, Congress passed a new bankruptcy law that discouraged ordinary homeowners from declaring bankruptcy, thus allowing lending banks to continue to charge the homeowners the usurious interest rates demanded by their mortgages. Republicans were already in control of both houses of Congress when George W. Bush became President. With such friends in high places, the financial industry began lobbying for new laws that would make it more difficult for ordinary individuals to file for bankruptcy when they could no longer pay their bills.

    Average Americans were having difficulty paying off their subprime mortgages and the principles on their high-interest credit cards. Many were declaring bankruptcy, thus depriving banks of the usurious interest rates they were receiving from their loans. As a result, the financial industry wanted Congress to make it more difficult for average Americans to declare bankruptcy.

    To disguise their true intent, the financial industry claimed that such a new law was needed in order to prevent "high-income deadbeats" (Smith 2012) from using bankruptcy to avoid paying their debts. The real purpose was to make it harder for ordinary individuals to get into bankruptcy court. The harder it was, the longer it would take and the more expensive it would be, so those people would have to continue paying big penalty fees to their banks.

    In 2005, Congress passed the Bankruptcy Abuse Prevention and Consumer Protection Act, which raised the legal and financial barriers to bankruptcy filings. This caused personal bankruptcy applications to plummet about 62 percent from 2005 to 2006. The new law acted like a legal barricade that prevented hundreds of thousands of honest Americans from using bankruptcy to seek relief from their financial burdens. The longer they were prevented from entering bankruptcy, the longer they were legally obligated to keep paying their banks the usurious interest rated demanded by their mortgages.

16. The George W. Bush administration bailed out banks too-big-to-fail during the financial crisis of 2007-2008, but prevented distressed homeowners from declaring bankruptcy. Shortly after the financial crisis began, Secretary of the Treasury, Hank Paulson, the Chairman of the Federal Reserve Board, Ben Bernanke, and the head of the Federal Reserve Bank of New York, Timothy Geithner, warned of impending economic disaster for the nation if $700 million was not immediately made available to the nation's largest

banks. President Bush told Congressional leaders that if such funding were not forthcoming for the banks, the country's economy would collapse, as per his comment, "this sucker could go down" (Reich 2010)

Paulson had been the head of Goldman Sachs, and Geithner had been installed at the New York Fed by major bankers, including Citigroup. The two of them secretly decided which institutions would get money, and how much they would get. Inasmuch as Goldman and Citigroup were the largest beneficiaries of the bailout, this reflected badly on the deal. The bailout was made even more suspect by the fact that neither Geithner nor Citigroup revealed any details of the bailout for several months. As a result, the bailout came to look like "a giant insider deal created by Wall Street for Wall Streeters, at everyone else's expense" (Reich 2010).

During the financial crisis, there were also proposals to allow distressed homeowners to declare bankruptcy rather than forfeit their homes to their lenders. Such a development would have given those homeowner more bargaining strength when dealing with their banks. But through their lobbying efforts with Congress, the banking community was able to prevent such developments.

17. Congress and President Bush allowed U.S. corporations to transform themselves into global corporations, and move thousands of high-tech jobs to foreign countries. During the decade of the 2000s, a large number of U.S. corporations outsourced thousands of high-tech jobs to foreign countries because they no longer felt the need to manufacture, or do research, or have operations, in the U.S.

Alex Trotman, the CEO of Henry Ford's old company, was among the first to openly sound that theme in the late 1990s. "Ford isn't even an American Company, strictly speaking," he said. "We're global." Ron Rittenmeyer, CEO of EDS, the largest American-based IT services company, described his firm as "agnostic about specifically where we operate." In 2005, former Intel CEO Barrett was so bullish about Intel's global presence and operations in an interview with *New York Times* columnist Thomas Friedman that Friedman paraphrased Barrett as contending that "Intel can be a totally successful company without ever hiring another American." In 2006, Cisco CEO John Chambers went further. "What we are trying to do," he said, "is outline an entire strategy of becoming a Chinese company." (All quotations are from Smith 2012).

The National Science Board reported that 85 percent of the growth in R&D workers by U.S. multinationals between 2003 and 2009 had been abroad, while American-based employment in high-tech manufacturing had dropped 28 percent since 2000.

Other large, well-known U.S. companies that used high-tech job outsourcing in a big way were IBM, Accenture, Hewlett-Packard, Dell, Deloitte, Affiliated Computer Services, Computer Sciences Corporation, J.P. Morgan Chase, Bank of America, and Citigroup. With no public announcements by either corporate or U.S. Government officials, former U.S. corporations that for decades and decades had *benefited hugely* from being U.S. corporations quietly transformed themselves into global corporations. In so doing, they moved thousands of high-tech jobs out of the U.S. into foreign countries, and rejected

many of the responsibilities it owed the United States and it citizens. To reduce the unflattering headlines, IBM went *sub rosa* with its firings. Although federal and state laws require companies to report material events such as large layoff, IBM stopped announcing large job cuts in 2006. (For a complete description of IBM's outsourcing activities see Smith 2012).

A careful inspection of the 17 stealth government actions reveals that each action somehow caused a segment in or near the top one percent of the population to benefit financially, while at the same time financially penalizing one or more income segments of the population that are idle or lower income.

The Status of Income Inequality

> I have previously expressed skepticism not about *whether* this has happened
> but about the magnitude of the increase in high-end inequality. Over time,
> my skepticism has eroded …
>
> Megan McArdle, *The Atlantic* (2012a)

So, what has been the impact of the stealth government actions described above? [3] Before answering that question, a cautionary warning is in order. Interpreting the figures that are commonly cited, especially those that are simply thrown around, is complicated. There are shortcomings in the data and there are ambiguities throughout. But, as Megan McArdle (2012b) wrote in *The Atlantic*, "some potential shortcomings [in the data] do not seem to actually alter conclusions about the rise in inequality." The outsized gains are at the top of the income distribution, and there they are "mostly concentrated in the top half of the top one percent." They are gains that came, she continued, "even as the poor and middle class became significantly better off."

Figures commonly cited compare the incomes of the top 10 percent, the top one percent, or the top one-tenth of one percent, with the bottom 90 percent, as does, for example, McArdle (2012b). That tells part of the story and often reveals the U-shaped curve depicted in Figure 3, below. Figure 3 illustrates that in 1976—1978 the top one percent of the population earned about 30-35 times as much of the nation's total income as the bottom 90 percent of the population. However, some 30 years later, by 2010-2012, the top one percent segment's share had exploded to about 150-200 times as much as the bottom 90 percent segment's share.

Figure 3. Average income of the top 0.1% as a multiple of the bottom 90%.
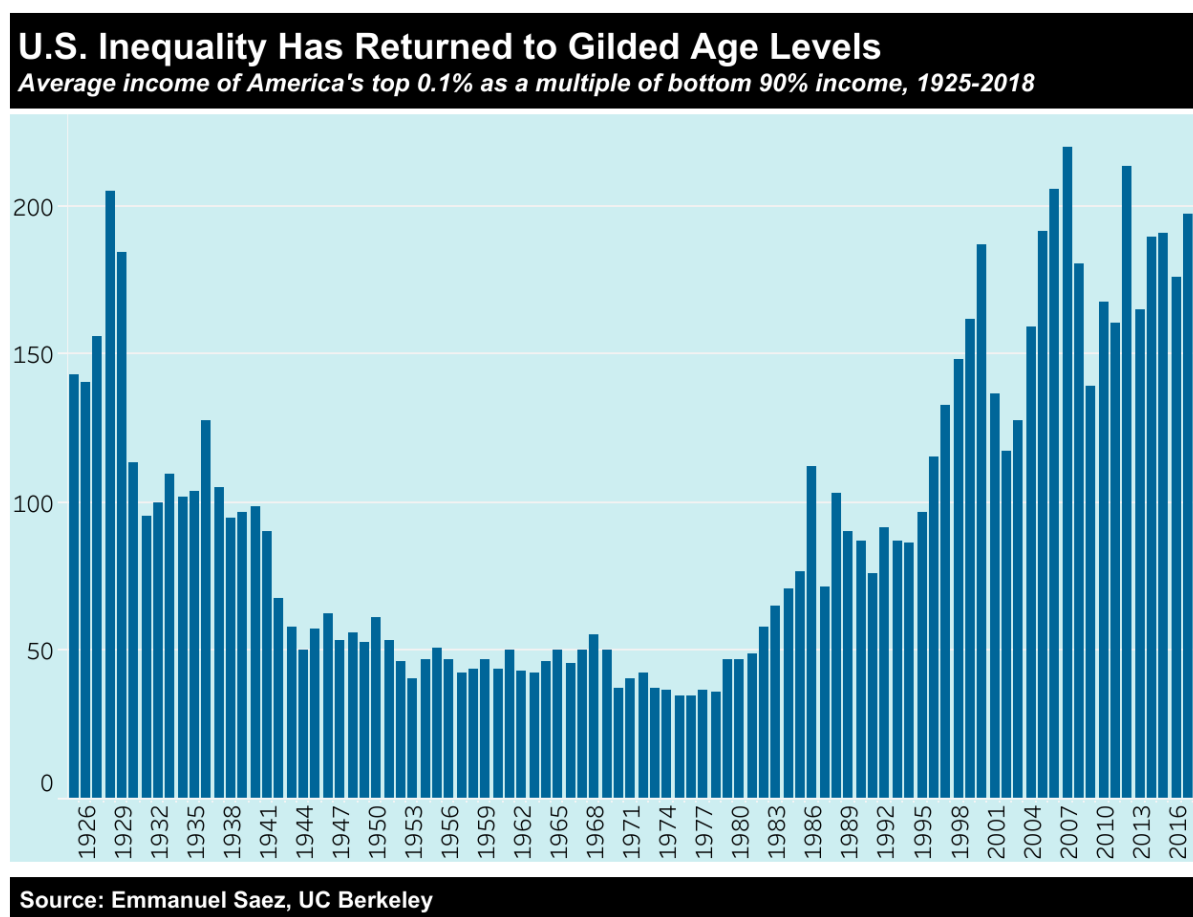
U.S. Inequality Has Returned to Gilded Age Levels
Average income of America's top 0.1% as a multiple of bottom 90% income, 1925-2018

Source: Emmanuel Saez, UC Berkeley

That U-shaped curve also *hides* part of the story. Leonhardt (2019) suggested that it is better to focus on five income segments, as illustrated in Figure 4 (below): the top 0.01 percent; the rest of the top 01.0 percent; the 90th-99th percentile; the middle 40 percent; and the bottom 50 percent. Figure 4 shows how each of these five income segments performed against the *per capita* G.D.P. performance over the 1980-2010 period. (Note that Figure 3 uses the top 0.1 percent segment, while Figure 4 uses top 0.01 percent segment.)

Figure 4. Growth of Incomes per segment compared with growth of per capital GDP, 1980-2015.

Since 1980, the incomes of the **very rich** have grown faster than the **economy.** The **upper middle class** has kept pace with the economy, while the **middle class and poor** have fallen behind.

CHANGE IN INCOME:
Top 0.01%

400% cumulative increase

300

200

Rest of top 1%

100

Per capita G.D.P.

90th to 99th percentiles

Middle 40%

Bottom 50%

0

1980   1985   1990   1995   2000   2005   2010

Note: Incomes are after taxes and include government transfers. • Sources: Thomas Piketty, Emmanuel Saez and Gabriel Zucman (incomes); Bureau of Economic Analysis (G.D.P.) • By The New York Times

Source: Leonhardt 2019

The incomes of the bottom 50 percent segment and the middle 40 percent segment have trailed Per Capita G.D.P. over time. Since 1980 "their share of the economy's bounty has shrunk" (Leonhardt 2019). The 90th-99th percentile segment's income (i.e., the middle class earning $120-425 thousand per year), has grown at almost an identical rate as has the economy.

However, the top 0.01 percent segment has experienced astronomical growth, very probably earning well over 150-200 times more than the bottom 90 percent segment's share of the nation's total income. The rest of the top one percent segment has clearly done better than the 90th to 99th percentile segment.

That, we assert, has been the outcome of the various stealth government actions enacted over the years. The top of the top have made out like bandits. The upper middle class have held their own (as a share of GDP), not getting ahead and not falling behind. The lower middle and those below have been losing ground; they have failed to partake in the economy's bounty. Some might say they have failed to receive their fair share of the country's economic growth.

The Challenge for Macromarketers

> …people don't even know. If poor people knew how rich rich people are,
> there would be riots in the streets.
>
> Chris Rock (2014)

As the forgoing illustrates, while productivity and wealth creation exploded during four decades following the 1970s, a critical mass of the United States citizenry continue to desperately struggle to make ends meet. Part of the reason for that is that the dramatic increase in wealth has been almost entirely absorbed by what we called, above, the power elite and the rich — the top one-tenth of one percent and, in that the top one-hundredth of one percent.

Our argument is that this was not an accidental outcome of free markets working their magic. It was using the law to steal and strategically withhold the generated wealth of the past two generations from 99 percent of the population. Why should this be of concern to macromarketers? It implies, if it does not demand, that macromarketers concentrate on truly macro issues—how institutions outside of what we traditionally consider the marketing system—impact that marketing system. Perhaps now, more than ever, the focus of macromarketers needs to shift to financial institutions and to how government, and the law, really work (and not the eighth grade civics lessons about how it supposedly works).

Macromarketing needs to once again become relentlessly vigilant and pay attention to the discipline's foundational concerns with all manner of social, economic, and labor inequalities of the middle classes (Jones and Tadajewski 2018, Benton 2021a, Benton 2021b). They do, after all, represent the most vital elements of economic and cultural growth in any society.

The middle classes do the living, they do the buying, dreaming, and dying. They build families, homes, ambitions, businesses. Without a vibrant middle class—well, we see what a shrinking and desperately neglected middle class can become: fractured, fragmented, forgotten, fearful, and angry. When people are frightened, they do frightening things, they believe in frightening principles, populist politicians, and propaganda. Macromarketing must commit its efforts to unveiling the opaque limitations of a dated 20th century business paradigm with transparency while advancing an honest strategic approach to business strategy at the dawn of the AI and the genetic-code revolutions.[4]

As Michael Lind (1995) wrote 28 years ago,

> The American oligarchy spares no pains in promoting the belief that it does not exist, but the success of its disappearing act depends on equally strenuous efforts on the part of an American public anxious to believe in egalitarian fictions and unwilling to see what is hidden in plain sight.

We propose that the success of its disappearing act depends as well on the equally strenuous efforts on the part of macromarketers to believe in the egalitarian fictions associated with *the market* and, until now, an unwillingness to see what is hidden in plain sight. We hope to have shed some light in at least one dark corner of the macromarketing system.

Notes

[1] It is also important that macromarketers understand the nuances in and the veracity of the debate as to whether the inequality that many see is actually less than it seems. That is *not* part of the present discussion.

[2] The following section is an abbreviated version of Stanley F. Stasch, "The U.S. Government's Program of Welfare for the Wealthy," available at https://fixcapitalism.com/the-u-s-governments-program-of-welfare-for-the-wealthy/. That paper is, itself, derived from *The Creation and Destruction of the Great American Middle Class: 1930-2010*, third edition, a 200-page history of these actions (available at http://ecommons.luc.edu/business_facpubs/5/).

[3] Some might object the we are here confusing correlation with causation. Consider, however, the following: "The well-intentioned assertion that relationships do not mean causation, while useful in contesting gross simplemindedness, is paralyzing and misleading in the social sciences. Or, as Dewey [1960, pp.124-125] puts it, the critical characteristic of all scientific operations is revealing relationships" (Luker *et al.* 1998).

[4] We thank our colleague, Eve Geroulis, for her impassioned plea regarding the future role of macromarketing.

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Social Conflicts and Market Dynamics

Co-Chairs:

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Social Conflicts and Market Dynamics: An Overview

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Clifford J. Shultz, Loyola University Chicago, United States of America

This track continues a conference tradition to include and feature research intended to study and ideally to redress harmful social conflicts via deliberate and constructive interactions among markets, marketing, policy, society and consumer behavior.

Social conflict is a phenomenon whereby two or more people oppose each other during social interaction; the conflicted parties exert social power with reciprocity to achieve goals that are incompatible or mutually exclusive (Pruit and Kim 2004; Kriesberg 1998). It appears in numerous forms, and at widely varying scope and scale (Deutsch 1973; Deutsch, Coleman and Marcus 2006). It can profoundly affect markets, marketing, consumers, policy, ideology and the global and local well-being of literally everyone and everything on this planet (Barrios et al. 2016; Shultz et al. 2005; Shultz and Wilkie 2021; Varman and Belk 2009).

The explorations by various scholars participating in this track largely examine macromarketing forces and factors that affect and/or are affected by social conflict and its resolution (e.g., Barrios, Montes, and Shultz 2019; Shultz 1997, 2007; see also Deutsch 1973; Fort 2014; Schelling 1960). That is, how dynamic interactions among markets, marketing, policy and consumption can create, exacerbate, reduce, and resolve social conflicts and ultimately enhance individual quality-of-life and societal well-being (e.g., Shultz 2015; Shultz and Malter 2022). These explorations more specifically examine evolving marketing systems during and following, for example, war, genocide, colonialism, and exploitation and disenfranchisement; the fact or fallacy of "just" wars; the well-being of refugees, indigenous people and impoverished women; research methods; megatrends; and integrative justice – all with implications for individual and societal resilience, resolve, recovery and flourishing.

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War on Ukraine and the Deliberate Destruction of a Flourishing Marketing System – A View from the Inside

Sophia Opatska, Ukrainian Catholic University, Ukraine
Clifford J. Shultz, Loyola University Chicago, United States of America

In February 2022, the world watched in horror as Europe again devolved into full-scale war; this time, in the form of an unprovoked attack and invasion by Russia on the sovereign nation of Ukraine.[4] What Russian political and military leadership expected to be a brief "special military operation" and quick Ukrainian capitulation has become a protracted war in Ukraine, drawing massive amounts of resources and commitments from many countries, with implications for every country and indeed the well-being of all global citizens.

The toll in blood and treasure already is staggering; the human suffering incomprehensible, and the depth and breadth of atrocities – including genocide and other war crimes – is unconscionable. And while "war in the 21 century is an absurdity" (Guterres 2022), it remains a grotesque reality in Ukraine. This crisis moreover raises questions about the roles of markets, marketers and marketing; government(s) and their policies; consumer choices and behaviors; democracy, human rights and sustainable well-being; and the systemic flow and assortment of goods, services and experiences they require. In sum, the Russian War in/on Ukraine is a condition that cries-out for macromarketing understanding and intervention.

In this presentation the authors provide a brief overview of Ukraine, prior to the 2022 Russian attack, to frame some key issues. We then share assessments of political, societal, economic, cultural, marketing and consumer dynamics, while a nation and its marketing system are under siege – with implications and obligations for other nations, marketing systems and global citizens that choose to align with Ukraine or Russia, or to abstain from choosing/supporting sides.

We hope the comments shared generate interest, rich discussion and explorations toward solutions for ending war, affecting peace and sustaining well-being in Ukraine and all countries.

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[4] Most of the world recognizes February 2022 as the start of Russia's war on Ukraine. Ukrainians however consider the 2014 Russian invasion of Crimea to be the start.

The Rebirth and Evolution of a Marketing System: Updates from a Longitudinal Study of Cambodia's Recovery from Genocide

Clifford J. Shultz, Loyola University Chicago, United States of America
Don R. Rahtz, William & Mary, United States of America

The authors update a thirty-year longitudinal study of Cambodia's recovery from Genocide, perpetrated by the Khmer Rouge under the ruthless dictatorship of Pol Pot, from 1975-1978. The authors briefly revisit lingering effects of the crushing policies during the era of "the killing fields" – including the annihilation of an extant marketing system and the brutal elimination of more than a million people favoring or associated with it, followed by a decade of socialist reconstruction. They then explore the transition to a more civil society and concomitant market/marketing reconstitution, and evolution of a new marketing system subsequent to the 1993 UNTAC elections.

Emphasis is placed on events from 2020 to the present, particularly the impact of COVID-19, growing Chinese influence, President Hun Sen's grip on power and plausible succession, and related political, societal, environmental, technological, and marketing dynamics. The authors update and expand two diagnostic, explanatory and predictive models, which have been especially useful over the course of this longitudinal study (e.g., Shultz 1997; Shultz and Pecotich 1997; Shultz and Rahtz, WIP), to assess the evolution and state of Cambodia's marketing system, key players affecting it, ongoing social traps, and the obligations for constructive engagement over time and place to ensure inclusion, social justice and sustainable peace and prosperity.

The authors conclude with implications for future developments and the well-being of Cambodians and stakeholders with interests in Cambodia, the greater Mekong River Basin, ASEAN and the global community.

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The Ethical Dimensions of "Just War"

Gene Laczniak, Marquette University, United States of America

The author outlines the historical CRITERIA for "just wars" as developed in Catholic Social Thought including "just cause, right intention, competent authority, comparative justice, probability of success, proportionality and last resort." The presentation will delve into how current geo-politics complicate these criteria as well as the possible contribution of marketing insights to improving potentially hostile situations.

The Transformative Role of *Literacy* in Addressing Marketplace Tensions Between Refugees and Their Local Hosts

Tugba Ozbek, Yıldız Technical University, Turkey
Ebru Enginkaya Erkent, Yıldız Technical University, Turkey
Ibrahim Kircova, Yıldız Technical University, Turkey

Over 100 million people have been forcibly displaced across the world, primarily as a result of violence, conflict, persecution, or abuses of human rights (UNHCR 2023). The forced migration of nearly 7 million individuals, largely due to the Syrian crisis, to many countries, particularly Turkey, is described as a humanitarian issue requiring attention (World Bank 2017). Considering today's social conflicts and the global climate crisis (UNHCR 2019), while it is impossible to reject the heterogeneity in the social structure with the ongoing migration waves, it is possible that the opposite situation will cause multiculturalism to be ignored and social cohesion problems to be exacerbated (Bauman 2018; DeQuero-Navarro et al. 2020; Penaloza 1995; Sennett 2015; Shultz et al. 2020).

Markets and consumption can also be sources of exclusion, stigma, inequality, and social conflict as well as producing meaning, improving well-being and bringing prosperity (Barrios et al. 2016; Krisjanous and Kadirov 2018; Singh et al. 2021; Sredl, Shultz, and Brečić 2017). Consumer vulnerability may emerge when encountering distresses in addition to daily tensions or trigger events (Baker and Mason 2012). Consumer vulnerability impacts billions of people throughout the world and refers to imbalances in marketplace interactions (Baker, Gentry, and Rittenburg 2005; Baker, Hunt, and Rittenburg 2007; Commuri and Ekici 2008; Hill and Sharma 2020; Shultz and Holbrook 2009). There is a range of potential consequences of vulnerability as consumers try to cope with their situations as either nondefensive or defensive mechanisms (Hill and Sharma 2020). Penaloza (1995) found that immigrant consumers become more vulnerable due to internal characteristics such as language proficiency, literacy level, and experience in the marketplace. It is related to the fact that limited literacy skills increase the potential for economic, physical, and psychological harm in the marketplace (Adkins and Jae 2010; Adkins and Ozanne 2005a, 2005b; Kapoor and Belk 2022; Ozanne, Adkins, and Sandlin 2005; Viswanathan, Rosa, and Harris 2005; Viswanathan et al. 2021a, 2021b). Adkins and Ozanne (2005a) present a social practice conceptualization of literacy which means a consumer skill including understanding consumer rights, managing exchange transactions and miscommunications, asserting one's voice and achieving agency in the marketplace. Literacy is also a negotiation of identity and is central to how people define themselves (Adkins and Ozanne 2005a; Penaloza 1995; Wallendorf 2001). In line with this, literacy is critically important for social cohesion and integration during permanent and temporary settlement of refugees in their host countries at the same time (Hanemann 2018; Netto et al. 2022). Language proficiency as a form of literacy empowers refugees to be involved in their host community and participation in the marketplaces. Among refugees, proficiency in the dominant language of the host country can also be considered linguistic capital as a form of cultural capital in markets (Bourdieu 1986, 1991).

This paper illustrates literacy as a consumer skill from a perspective of reducing tensions among socially conflicting potential groups in a multicultural marketplace. It is to investigate this phenomenon through the study of how literacy can play a transformative role in addressing marketplace tensions between the host community and Syrian refugees with different literacy levels in the Turkish language in their host country, Turkey. We aim to discover the most significant challenges refugee consumers face and how they navigate these issues through literacy skills. We focus on examining refugee consumers who have and do not have literacy skills in their host countries to gain insights from comparisons between refugee consumers with different literacy levels in creating a social impact on market dynamics. Thus, this proposal is about how being relatively less or more literate in the marketplace transforms the state of powerlessness and dynamically creates a threshold for vulnerability and resilience. In the current literature, studies on literacy as a well-being and vulnerability output in different forms such as financial, health, service, and digital, and entrepreneurial literacy have been conducted (Adkins and Corus 2009; Bernardes et al. 2020; Floyd and Sakellariou 2017; Jae and Delvecchio 2004; Netemeyer et al. 2020; Netto et al. 2022; Stewart and Yap 2020; Viswanathan, Rosa, and Harris 2005; Viswanathan, Gajendiran, and Venkatesan 2008; Xiao and Porto 2022). However, little attention has been paid to the influence of language and literacy in enabling refugees to navigate marketplace tensions in their new consumption surroundings and understanding the transformative role of literacy as a social impact mechanism in the marketplaces in the context of refugees as vulnerable consumers. This gap leads to the following research question:

RQ: How does literacy contribute to navigating 'tension' in refugee-hosting marketplaces?

The idea for this proposal emerged from the focus group meetings and in-depth interviews held with Syrians in Istanbul, Turkey, within the scope of the author's doctoral research ongoing on consumer vulnerability in the context of forcibly displaced persons. While answering the questions on their marketplace experiences and challenges, an informant noteworthily stated how she navigated the tension they experienced with a local host in the marketplace as follows:

> Since I speak Turkish very well, I do not have too many problems at large because they do not understand that I am Syrian. A salesperson who heard us speak Arabic during shopping with my low-literate Syrian friend put an overprice. I knew it was too expensive! When I opposed it in the Turkish language, he first looked at me in surprise and was ashamed of his action. I felt powerful to be able to express myself in that situation.

Tension in the marketplace exposes another dimension of intolerance that hinders integration, social cohesion, and trust between both communities (Baktir and Watson 2021; Kheireddine, Soares, and Rodrigues 2016, 2021). Refugees with limited literacy abilities may encounter stigmatization in their host countries; that is, they may face unfavorable social judgment, be labeled inferior, and suffer unjust or unequal treatment. However, literacy as a social impact mechanism can help restrict powerlessness by making price comparisons, building trust, improving tolerance, enhancing self-reliance, and negotiating stigma. It also demonstrates how literacy can be used to enhance consumer ability and motivation.

Lack of effective communication between refugees and their local hosts can undermine trust and tolerance (Baktir and Watson 2021; Gau and Viswanathan 2008). Unequal treatments such as high prices, few options, or no sales to refugee communities limit market transactions, and this can prompt marketplace tension by triggering discrimination. On the other hand, vulnerability experiences revolve around social stigmatization and marginalization that arise from ascribed categories of gender, class, ethnicity, religiosity, and nationality (Mitra et al. 2022; Pechmann et al. 2011; Penaloza 1995; Shultz et al. 2020). In identity management as a way of supporting resistance, literacy can be used as a challenge to be more successful in negotiating in a marginalized marketplace. For this reason, language acquisition for humanitarian migrants is critical for employment, social interaction and cohesion within their local communities, and access to accurate information as well as a sense of subjective well-being, dignity and independence in the new environments (Catibusic, Gallagher, and Karazi 2021). Extending beyond the vulnerability focus, self-reliance can consider as a program approach including the psychological, social and economic ability of an individual or a community to meet their needs in a sustainable manner (Skran and Easton-Calabria 2020; UNHCR 2005). Literacy can therefore promote self-reliance by adjusting to their new location through programs such as marketplace education. As highlighted in the existing literature (Adkins and Ozanne 2005b; Viswanathan et al. 2021a; Viswanathan, Gajendiran, and Venkatesan 2008), it is notable to discuss how marketplace literacy education can provide opportunities in the context of refugee consumers with less literacy to improve their literacy skills.

For a better world, research on critical social issues makes a tangible contribution to improving individual, community and societal well-being. This understanding is embedded in the ontology of macromarketing (Ekici, Genc, and Celik 2021; Iacobucci 2019; Shultz 2007; Shultz and Wilkie 2021). There is an emphasis on consumer inclusion in the 'transformative' paradigm and studies focus on improving consumer well-being. It is also observed that studies dealing with the subject of "refugee" have increased with the "Syrian refugee crisis" (The Guardian 2015; UNHCR 2015), which reached its peak in 2015 (also see Web of Science). However, although it is seen that studies on these vulnerable groups in the business and marketing literature are pretty inadequate, it is thought that this gap in the literature should be filled by focusing on outputs that will create meaningful transformation within the framework of social values. Turkey hosts about 4 million Syrians under temporary protection (UNHCR 2021; World Bank 2023). Therefore, the analysis unit of the proposed research includes Syrians under temporary protection in Turkey. The primary goal of this study is to comprehend rather than measure. Thus, this proposal has been attempted by adopting a qualitative approach because consumer-led phenomenological studies develop a narrative on the shared meanings of lived expressions (Crick 2021; Holbrook and Hirschman 1982; Schallehn et al. 2019; Thompson, Locander, and Pollio 1989). This paper embraces the approach proposed by Boenigk et al. (2021) who define refugees are persons who have fled their home country due to tragedy, violence, persecution, or climate change, which has made it impossible for them to return safely. They believe a person may be a refugee even without having received formal legal status because a refugee's basic requirements may not begin or end with receiving or surrendering legal status. This proposal has been handled in this light and formed by various observations obtained from Turkey, the country with the largest refugee population globally.

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Strengthening Marketing Systems and Macro Policies to Address Social Conflict and Well-Being Among Indigenous and Peasant Women in Peru

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Peru is a leading mining producer of various metals (gold, silver, copper, lead, zinc, iron, tin, molybdenum, tellurium, among others). The Andes Range, Peru´s backbone, is the largest source of mineral deposits in the world and is the location of the majority of mining projects as well as home to numerous peasant communities. Mining accounts for 9% of Peru's gross domestic product (GDP) reaching almost 60% of the total value of exports (SNMPE 2019). However, large scale resource extraction in Peru are also sites of significant social conflict. Data from Peru's Defensora del Pueblo indicate that 66% of local level conflicts in the country are linked to mining operations, representing more than 150 active conflict sites (Defensoria del Pueblo 2015) These conflicts can turn deadly. For instance, in Sept 2015 violence erupted at the Las Bambas mining project, a US$ 10 billion investment that left 4 dead, 15 wounded, and 21 detained.

Indigenous and peasant communities in Peru are beset by poverty, exclusion and inequality leading to high levels of mining-related conflict (Loayza and Rigolini 2016). The Ombudsman Office of Peru defines these conflicts as "a complex process in which different sectors of society, the State and/or the mining companies involved perceive that their interests, objectives, values worldviews or needs are contradictory, and which dynamic revolves around the control, use and/or access to the environment and its resources, creating a situation that could result in violence. Political, economic, social and cultural components are also present" (Defensoría del Pueblo 2012).

Women fare particularly poorly in mining affected regions, experiencing disproportionately high levels of discrimination, marginalization and exclusion, especially within the economic spheres (Lahiri-Dutt & Macintyre 2017) and are disproportionality excluded from the benefits from mining. Unemployment and underemployment are almost twice as high for women with women accounting for less than 10% of the mining workforce in Peru (PNUD) and almost half of rural women do not have their own income (INEI-ENAHO 2014). Those women who do participate in the mining sector often labour in obscurity as economic actors because much of this labour occurs in the informal (ASM) sector or in marginal and often precarious areas of mining. Mining has also been shown to negatively impact food availability among women in addition to other negative impacts (Beck and Wegenast 2020).

To address these exclusions and related social conflicts, a plethora of initiatives, laws and programs have been aimed at quelling social conflicts in the sector by establishing market-based alternatives to mining. Diversification away from mining is seen as critical to addressing poverty and inequality, reducing social conflict and improving wellbeing in mining affected communities. For example, our survey of mining related corporate social responsibility spending indicates that approximately half is spent on economic development. Yet these spendings and programs have not translated into market related expansions and women issues remain highly

excluded. Women's voices remain silent in decision making, especially related to critical stages of decision making, in these regions, due to social, cultural and historical factors.

This presentation will present findings from action research initiative – 'Colab Peru' that took place in Peru over 5 years with one of its' aims to foster more inclusive policies and practices to support marketplace solutions to reducing conflict through improving women's benefits from mining and from the legacies of the sector.

The findings illuminate key obstacles to women's inclusion and the development of thriving marketplace solutions including, exclusion from decision making, poor linkages to local or regional development plans, lack of synergy among CSR and marketplace development, unproductive projects, and poor integration into supply-chains and global markets. The presentation will also cover the results of a pilot project applying The Co-Laboratorio approach (Francis, Henriksson & Stewart 2021), a novel methodology to increase meaningful participation by women in national, regional and integrative planning and governance, aimed at improving community well-being while reducing social conflict. Beyond inclusion in decision making, macro market systems-centered solutions include the coordination of CSR resourses, alignment with government investments, women capacity building, co-financiang arangements, common planning platforms and supply-chain integration.

The results adds to our understanding of the role of maketing systems in reducing social conflict and increasing women's well being in mining affected regions.

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The Marketplace as Intercultural Dreaming and Collective Desire

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The paper focuses on intercultural imaginaries and utopia as a collective desire for individuals (micro), organisations (meso) and societies (macro). Drawing on relevant marketing literature, the research paper distinguishes between various utopian concepts and views that then are applied to different levels of the macromarketing system. The research advances the conceptual understanding of the intercultural dimension of utopian desires and shifts the focus of the utopian ideal as a Western into a broader intercultural phenomenon where experiences and imaginaries emerge as a result of collective desires and migration from one place to another emerging from and building up micro, meso and macro utopian desires. The empirical research is built on 131 photos taken by refugees in Finland between 2017-2021. These are coupled with one-on-one photovoice interviews (n=9) and micro focus group interviews (n=23). The paper answers the following questions: How is utopian social dreaming shaped by migration in the macromarketing system? How does intercultural social dreaming create alternative marketplaces for micro, meso and macro utopia? The paper provides a complementary approach to the extant macromarketing literature on utopia by extending the research towards intercultural imaginaries of the ideal exemplified in the empirical sphere.

Introduction to the Utopian View

Although Utopia as a Western concept was first introduced by Thomas More in the 16th century (Davis 2010), both utopian and its counterpart, dystopian ideals, have existed even long before. Utopian stories are grounded in writings about Biblical lands, the myths of the Wonders of the Far East from the time of Hellenistic expansion, and fictional stories of travellers during colonialization (Eco 2013). If the Western identity is strongly rooted in the colonialized worldview–orientalism (Said 1978) and otherness (Bhabha 1994)–the same is true for utopian ideals (Dutton 2010; Eco 2013; Pohl 2010; Sargent 2010).

The utopian project became societal as the shift from 'elsewhere'–unknown and inaccessible place–to a 'time to come' materialized during the Enlightenment (Roemer 2010), which initiated the utopian projection into the ideal society located in the future (Vieira 2010). In broad sense, utopianism has its basis on 'western dreams of a better world, an ideal existence or a fantastic future' (Dutton 2010).

In general, utopian ideals seem to question the current state of being for individuals, organisations and societies at large. Whether it is a no-place (utopia), a good place (eutopia) or an imaginary and liberating way of organizing society, utopias are grounded in the desire for a better life, where 'the principal energy' is hope (Vieira 2010). Thus, there is a bond between reality and imaginary as the utopian imaginary is always anchored to being in real society (ibid.).

The loss of hope as the end of utopia seems to be a dominant idea in many recent sociological writings. This becomes evident in the writings of Popper (1945), Fukuyama (1992) and Fisher

(2009) about 'the end of utopia', 'the end of the history', and 'the end of hope' as the nightmarish twentieth century with world wars and loss of humanity finally shifted from dystopian totalitarianism towards collapse of Marxist ideology and the overcome of capitalism. *"Too bad. We're in paradise. Illusion is no longer possible",* the sightless present was summed up by Baudrillard (2008, p. 97).

If the literary dystopian view has often been didactic and moralistic while referring to imaginary places worse than the real (Vieira 2010), in marketing literature the dominant dystopian view seems to be grounded in criticism against neoliberalist markets and desirable fetishistic consumption, where democracy has "drown in popcorn and toothpaste, with citizenship debased to a mere commodity" (Claeys 2010).

Utopia in marketing literature
If utopia literature has been strongly divided into a literary utopia of imaginary lands (non-places) (Claeys 2010) and an emancipatory/societal utopia of better time (society)-to-come (Levitas 2011), most of the utopia research in marketing focuses on liberatory utopian imaginaries based on Western myths (e.g. Llamas and Belk 2011), dystopian nightmares (e.g., Belk, Gopaldas, and Humayun 2020), or the relations between these two (e.g., Bradshaw et al. 2021). In this sense, the current utopia research is highly focused on a transformative and emancipatory view where marketplaces are seen through both utopian and dystopian imaginaries.

Research focusing on utopian marketplaces often criticizes neoliberal capitalism and consumption culture, where fantasy shopping and commodity fetishism (e.g. Brottman 1997), or carnival-like gambling in Las Vegas (Belk 2000; Humphreys 2010) represent a market utopia grounded in neoliberalism, while for others utopian marketplaces (e.g. Brown and Maclaran 2005), anti-capitalist and communal festivalization (Kozinets 2002), street arts in urbanscapes (Visconti et al. 2010), or the Star Trek fandom (Kozinets 2001) appear as participatory and consumer-driven emancipatory utopian movements and breaking free from capitalist structures. As an alternative to neoliberalism and the 'rational man's utopic mastery over the nature' (Cronin, Hadley, and Skandalis 2022), utopian post-capitalism can be seen as a model of sustainable and green consumption (Fitchett and Prothero 2000) built on peoples' power and civic, political and environmental activism (Dermody et al. 2021). However, non-Western utopian imaginaries embedded at societal level and available for citizens to consume are largely ignored. Yet, migration is often grounded in collective desire or utopian hope for a better place or time to come (Belk 1994). While the film industry and science fiction are heavily rooted in 'otherness' and peoples' desire towards dystopian realms (e.g., Bradshaw, Fitchett, and Hietanen 2021), techtopian narratives–technological development for the common good–appear as a counter-phenomenon where the future is seen as bright and joyful (Kozinets 2007). Otherwise, techno-utopian literature, whether based on artificial life (Belk, Gopaldas, and Humayun 2020), the self in virtual consumption (Denegri-Knott and Molesworth 2010) or different technology narratives (Kozinets 2007) open up consumers' fascination and fears of various techno-utopias.

Although utopia is defined as an imaginary place 'nowhere' or societal transformation towards a better future, a surprising number of articles deal with nostalgia-framed utopian past (e.g., Brunk, Giesler, and Hartmann 2018), which see the "idealisation of the past" as a "similar process to idealising the future." (Blanchette 2014). In addition to these views, Foucaldian (1984, p. 3)

heterotopia - spaces where the real is 'simultaneously represented, contested, and inverted' - has been used by several marketing scholars to study embodied heterotopia and a body as a place (different than the real) created through tattooing (Belk and Roux 2019), heterotopian gated communities rooted in neoliberal prosperity and normalization of the social separation (Chaudhuri and Jagadale 2021), heterotopian selfie practices as part of the attention economy and social media platforms (Canniford and Rokka 2016), or urban neighbourhood as an alternative for green and ethical consumption (Chatzidakis, Bradshaw, and Maclaran 2012).

What these studies have in common is that they all describe imaginary places, transformation into better utopian societies or dystopian visions rooted in Western myths and images–grounded in the 'otherness' or neoliberal desires–but not much on intercultural imaginaries (*intercultural imaginaries*: see Dutton 2010) or forcibly displaced individuals experiencing heterotopias in their new communities.

Empirical research
By seeing the hope and desire for a better future as a universal concept, this research looks at migration, refugees and their social dreaming of/in a new place. The empirical context is Middle Eastern and Turkish refugees living in Finland. The empirical research is built on 131 photos taken by refugees in Finland between 2017-2021. These are coupled with one-on-one photovoice interviews (n=9) and micro focus group interviews (n=23) to uncover the meaning behind the photos and what kind of experiences they reflect. The research context is specific to the existing utopian research in marketing, as the utopian dreaming has largely been seen as a Western concept.

Preliminary results
The preliminary results show that photos that the refugees had taken or uploaded from the internet vary from everyday objects like food and clothes to more tangible dreams of houses and furniture. The food, representing the interviewees' current consumption habits, enabled cultural dreaming of lost homeland, mixed with local ingredients. Rather than integrating to the local food culture the refugees combined food items from their own country or regions nearby with local Finnish food.

Some photos also included images of ethnic restaurants, showing how the migration has led to the rise of alternative and heterotopian marketplaces such as ethnic grocery stores, restaurants and festivals in Finland. While refugees are forced to leave their homelands, migration creates alternative marketplaces for immigrants to dream of their nostalgic past or maintain their cultural identity. Gradually, these heterotopias also offer locals the opportunity for an alternative marketplace built on the perception of otherness and a social dream of distant places.

It seems that the utopia and cultural dreaming that the photos reflect is in flux. Overall, the photos reveal a longing for a better future. However, rather than completely and eagerly adopting the integration to local consumer culture the utopian and nostalgic dreaming is holding refugees back to the past life. The intangible, liquid consumption (Bardhi, Eckhardt, and Arnould 2012) of food items serves both the purpose of nostalgic dreaming and the preservation of cultural identity, while the more tangible, or solid (ibid.) consumption objects have an orientation both to the past and to the utopian future. When it comes to the utopia of tangible items, such photos

more reflect a distant dream, not the current consumption. Photos of tangible possessions, such as houses, cars and fashion items, reflect, on the one hand, the styles and customs of Finland, while on the other hand, remind of the life lost when fleeing from the home country. The previous lifestyle in the home country, prior to the events leading to forced displacement, emerges as a type of material nostalgia which the individuals want to return to, not physically, but through their consumption.

Conclusion - social dreaming

> *If particular society's cultural world – the dreams that have guided it to a certain point – become dysfunctional, the society must go back and dream again (Thomas Berry)*

While the history of utopia derives from the 16th century literary field, the utopian roots are in Biblical lands, ancient myths of Otherness and colonialization. Likewise, utopian ideals can be seen as global phenomena as all societies have their own founding myths and stories about imaginary lands. In this sense, this paper broadens the utopian concept into culturalscapes and shared symbolic realities built on the fantasies and desires of the nostalgic past and the hope for a better future. Furthermore, this research sees utopia as an intercultural social dreaming, a collective desire for a place at the end of the fairy tale, where 'they all lived happily ever after' (Parrinder 2010).

The paper provides a complementary approach to the extant marketing literature on utopia by extending the research towards 'intercultural imaginaries of the ideal' (Dutton 2010) that has not been addressed in previous macromarketing studies.

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Systemic Integration of the Sacred and the Secular: Template for Sustainable Peace, Prosperity, Humanity and Well-Being

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The purpose of this presentation is to introduce a template for collaborative research that explores the awareness and impact of two recent Encyclicals by Pope Francis, and the extent to which markets, marketing, consumption, policy -- and the catalytic institutions that drive/regulate them -- can contribute to their actualization in the forms of sustainable peace, prosperity and well-being.

The authors introduce the purpose and evolution of this project; consider key issues, constructs and measures; and they discuss plans/players going forward, and plausible outcomes. Key constructs include: Interconnectedness of all things, with some emphasis on social and environmental issues that are intrinsically connected; the familial relationship between/among all human beings; love, humanity and inclusive marketing systems as foundational for building a culture of encounter; need for global response to systemic challenges such as racism, poverty, exploitation, environmental degradation; a call for constructive engagement with these issues and the people and institutions affecting them – in other words, "Macromarketing". This work builds on seminal models that assist the diagnosis, policies and practices, which in turn shape the constituents, actions and outcomes of marketing systems (DeQuero et al. 2020; Laczniak and 2009: Shultz 2015; Shultz et al. 2012; Shultz Rahtz and Sirgy 2017; Shultz, Sirgy and Rahtz 2022).

Key objectives include the assembly of a team of scholars, around the world, development of an instrument vis-à-vis sacred and secular constructs; a pilot study to check reliability/validity of the instrument; data collection on a larger scale, with global representation; report/publish initial findings; track and assess trends, over time; potentially other initiatives that may become apparent during the presentation and discussion.

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Sustainability and Climate Change Track

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Packaging System Transformation for A Sustainable Future: A Macromarketing Agenda?

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Introduction

The environmental impact of plastics is becoming increasingly clear. Seventy-eight million metric tons of plastic packaging is produced worldwide annually (Royte 2019), but only nine percent is recycled (Geyer, Jambeck, and Law 2017). Most escapes the system, into landfill, or into waterways and oceans; particularly single-use plastic packaging which has the largest environmental impact of all (Hardesty et al. 2021). Furthermore, plastics are petrochemicals, which break down and enter the food chain as micro-plastics, which have been implicated in immune diseases and infertility (Kumar and Laskar 2019). The raw materials for petrochemicals are fossil fuels, a non-renewable resource, and the prime culprit in climate change. The problems associated with petrochemicals and systems leakages have created serious negative externalities, all of which reflect the outstanding utility of plastic. For example, in food provisioning systems plastic packaging provides valuable cost saving and value creating benefits including safety, hygiene, efficiency, quality, consumer convenience and reduced food waste (Parsons 2021). However, the negative impacts of petrochemicals must be addressed. We must radically reduce the amount of plastic used, find alternative technologies, and capture valuable resources rather have them pollute or add to landfill i.e., establish a circular economy model for (single-use) plastics (Grodzińska-Jurczak et al. 2022; MacArthur 2017). In order to achieve these essential and urgent goals, we need a more nuanced understanding of: (1) How plastic permeates food provisioning systems; and (2) How we might rethink those systems in order to support transition into a circular economy.

In support of that goal, this paper is a call to macromarketers to explore the role of plastic packaging technologies in food provisioning systems. On the supply side, we build on Williams, Davey, and Johnstone's (2021) suggestion that we need to investigate transformation possibilities in the packaging system, including conventional and bio-based (e.g., compostable, biodegradable) packaging. Previous work in industries such as textiles (Ekström and Salomonson, 2014) are likely to provide some direction. On the demand side, Rhein and Schmid (2020) note that consumers feel helpless to effect meaningful change given the power of (retail) corporations; forced to buy what is presented to them. On the other hand, retailers feel constrained by government regulation and the demands of shoppers (Lee, Little and Nair 2019). While we agree that consumer responsibilisation distracts attention from a damaging system, we also consider unreflective overconsumption is part of the problem. We therefore need to question the nature, form and significance of consumption and disposal in our lives (De Coverly et al., 2008). Some examples of demand side solutions include reusable packaging product-service systems (PSS) that allow consumers to refill from bulk dispensers (e.g., bulk bins), parent packaging (e.g., milk bottles), and returnable packaging (e.g., Loop) (Zhu et al. 2022). However, these systems are not as yet widespread. Making reusable packaging solutions the default in food

provisioning systems will require a sea change in mindsets and behaviours for all stakeholders – producers, manufacturers, retailers and consumers (Coelho et al. 2020). To support that transition, further work is required interrogating the nature of that system, and how we might usefully intervene.

System Level Change

Several streams of research have examined the challenge of implanting circular economy principles into food provisioning systems. One stream examines package-free grocery shopping behaviours (Fuentes et al. 2019) and use of reusable packaging (Greenwood et al. 2021). Studies have identified barriers to purchase of zero-packaging (Bentham et al. 2022), including time (Beitzen-Heineke et al. 2017), inconvenience and accessibility (Lofthouse et al. 2009), safety concerns, and issues of trust and quality due to products being unbranded (Minami et al. 2010), lack of assortment (Hörisch and Marken 2019) as well as concerns over price (Lofthouse et al. 2009; Long et al. 2022). New store types such as specialist refilleries and zero waste stores are emerging, however shopping is more time intensive as the assortment is limited, and consumers must remember and bring the correct number of containers (Rapp et al. 2017). 'Responsible' shopping requires consumer investment before, during and after; including planning, time spent in-store and post-shopping materials management (Fuentes et al., 2019). In short, for consumers, "doing the right thing" is more troublesome and more expensive (Bentham et al. 2022). Some researchers, especially those investigating consumer attitudes, perceptions and behaviours, suggest promoting sustainable packaging stores and engaging in targeted social marketing campaigns to reduce plastic usage. However, systems and practice researchers (e.g., Little, et al. 2019; Shove 2003) argue the comfort, cleanliness and convenience of plastic-intensive modes of shopping easily available in supermarkets and hypermarkets provide little incentive for change. Furthermore, packaging confers hidden consumer benefits. For example, Evans et al. (2020) found consumers rejected more sustainable packaging as the hedonic benefits (in this case the crackling of a regular crisp packet), failed to provide expected sensory value. This example highlights that care should be taken to untangle the benefits and costs consumers associate with packaging if we are to transition to forms that are both more sustainable and equally if not more satisfying.

Approaches that responsibilize consumers are therefore only part of the solution, we need systems-wide responses (Wooliscroft 2021). However, path dependency restricts the propensity for change at the supplier and supermarket level (Duffy and Layton 2018). Economic gains and consumer preferences motivate retailers; and single-use plastic packaging is cheap, easy and appealing to shoppers (Gustavo et al. 2018; Little et al. 2019). Reusable packaging is none of those things. Tracking reusable packaging creates logistics and supply chain challenges, such as the need for digital passports to track and trace reusable packaging (Ellsworth-Krebs et al. 2022). Previous macromarketing research has touched on these systems lock-in mechanisms around plastics. For example, Little et al.'s (2019) study of a failed plastic bag tax identified the mechanisms reinforcing an unsustainable marketing system, and Williams et al. (2021) emphasise the role of regulation and legislation. Plastic bag bans and taxes are a global policy norm (Clapp and Swanston 2009), and similar approaches are now being taken to single-use plastic packaging and utensils (e.g., plates, straws). Yet, there is still a lack of research focusing on how the system might move beyond current plastic packaging technologies (Evans et al.

2020; Williams et al. 2021). Work is also required focusing on how cultural and social norms legitimize the continuation of a single-use plastic packaging system.

Unanswered Questions to Move Us towards a Circular Economy
While valuable work has contributed to understanding, many important questions remain unanswered about the role of plastic packaging technologies in the food provisioning system, for example:

1. France is banning single use packaging for 30 types of fruit and vegetables, while the draft EU Packaging and Packaging Waste Directive aims for 40% of takeaway food packaging to be reusable by 2040. How do policy initiatives such as these affect retailer and manufacturer decision making around switching to plastic-free shopping and alternative packaging modes? How does regulation spur companies into action?
2. Wegmans, a grocery retailer operating in the United States, set a goal to reduce in-store plastic packaging and other single-use plastics, by 10 million pounds by 2024. Many other retailers focus on the issue of environmental impacts from single-use plastic bags (e.g., Walmart, Target, and Kroger). How can stakeholders in the system work together to implement new packaging systems? How do supply chains react to such changes? Are the most visible interventions also the most impactful? How can we ensure we tackle the most impactful areas of resource waste first, instead of the most visible (e.g., plastic bags)? How can consumers and activists encourage companies to switch to more sustainable value propositions around in-store and take-out options, particularly in countries with little or no legislation on reducing plastic waste?
3. How can we legitimise and normalise alternative and reusable packaging systems that may be less 'clean', convenient and comfortable? For example, can nostalgia (re)create preferences for the 'milk man' and other forms of reusable packaging systems? How do we avoid continued inconsistencies, opacity and obfuscation in package labeling? For example "biodegradable" suggests to consumers that it is safe to use such a bag and no behavior change is needed. However, these bags can contaminate the waste stream and compromise processing due to local waste management constraints.
4. How do food provisioning practices support, enhance or block transitions towards the circular economy? What artefacts, skills and meanings are implicated, and how do we draw on the ideas of macrosocial marketing to implant change? How are issues of food waste and plastic waste intertwined, and how do consumer practices around food acquisition, preparation, consumption, and disposal affect single-use plastic waste?
5. How does sustainability-oriented innovation (SOI) integrate with the idea of food provisioning practices? How can SOI support transitions towards the circular economy?

We implore and encourage macromarketers to take up these research challenges.

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The Forest and Its Role in the Move Towards a Sustainable Society: Should I Stay or Should I Go?

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Introduction

The forest can be associated with a variety of values such as economic value (market value), affectional value (feelings), nostalgic value (longing for the past), historical value (an appreciation of the past), experiential value (how it is experienced), place value (how it is experienced depending on location and surroundings such as different trees, wind power etc) and functional value (how it is used, for wood products, textiles etc.). In a society dealing with severe climate change, the forest is expected to contribute to the transition towards environmental sustainability according to the Paris agreement (unfccc.int). The forest's ability to stores carbon dioxide makes it preferable to maintain the forest or even increase the number of trees to compensate for emissions of greenhouse gases from other sectors. The goal of the Paris agreement is to limit global warming to well below 2 Celcius, preferably to 1,5 Celcius (unfccc.int). There are conflicting opinions whether the forest should be kept or not. By not harvesting the forest, carbon dioxide is stored in the soil. At the same time, material from the forest is expected to be used instead of cement and fossil-based raw material and hence it needs to be harvested. In addition to different opinions on whether the forest should be harvested or not, there are also different opinions on the practices of managing a forest, including the trees to plant and the type of forest harvesting.

The role of the forest in the move towards a sustainable society needs to be understood in relation to contemporary consumer culture. The purpose of this paper is to highlight different consumption practices that are related to the forest by presenting different logics representing different views on the forest and its relation to consumption. Throughout the paper, examples are given from Sweden that represents a country of trees. Different actors have different views on forest governance and management in Sweden over time (e.g., Mårald et al. 2017). Macromarketing researchers emphasize the importance of sustainability and consumption (e.g., Assadourian 2010; Kilbourne, McDonagh and Prothero 1997). A macromarketing perspective of the role of the forest in the move towards a sustainable society is important in that it recognizes the complexity of different values and power relations in logics co-existing in contemporary consumer culture.

The Forest and Consumption Practices

The IPCC (the United Nations Intergovernmental Panel on Climate Change) report on climate change from 2021 states that human activities are responsible for historical climate change. Emissions of carbon dioxide based on human activities represent +1.1 degrees Centigrade between the years 1850-1900 and in the next twenty years the global temperature is estimated to rise by 1.5 or 2 C if nothing is done. The situation has not improved lately (IPCC 2022). Climate change is strongly connected to consumption and as mentioned above, the forest is expected to contribute to the transition towards environmental sustainability according to the Paris agreement (unfccc.int). An understanding of consumption practices (e.g., Pantzar, Shove, and Watson 2012;

Ward 2005) related to the forest, including consumption of wood products, is not only vital, but crucial in contemporary consumer culture. Different logics representing different views of the forest and its relation to consumption practices are discussed next.

A Cultural Logic of Consumption
Wood products from the forest has, from a historical perspective, played a major role in the transition towards a welfare society in Sweden. Industrialization allowed mass production of wood furniture at lower prices. After the Second World War and during the 1950s, there was a strong belief in the future. Consumers had more money to spend on consumption as well as more time. In 1951 a law stating the right to have three weeks holidays was implemented and in 1957, the number of hours worked per week was reduced to 48 hours (Eriksson 1999). Shopping developed to become a leisure activity. Design became more popular during the 1950s and exotic wood products such as teak, mahogany and jacaranda was fashionable as well as traditional pinewood that was heavily used. Ingvar Kamprad started the first furniture department store in Älmhult, Sweden in 1953 and IKEA later established department stores all over Sweden and world-wide. IKEA has played a major role in launching the chip board as a major component in furniture making. The business idea of selling wood furniture at reasonable prices has been successful for IKEA and other department stores. It has contributed to more people being able to afford to buy new furniture. The low prices have also led to that people in contemporary consumer culture replace their furniture at a much faster rate than earlier in history. Hence, the average age for furniture has been significantly reduced. In general, old hand-crafted wood furniture is not found attractive in contemporary consumer culture even though it is sold a low price. One reason is the old-fashioned design and the fact that such furniture sometimes require space that present day houses or apartments lack. Newly produced handcrafted wood furniture with modern design is sold a high price, but with limited demand.

Apart from increased welfare and lower prices, fashion plays a role for changing consumption patterns of wood products. Campbell (1987/2018) describes the importance of consumer dreams in his historical description of consumption over time. Fashion is highly prevalent in today's popular culture as well as social media. Also, an aestheticization of society in general (e.g., Löfgren and Willim 2005) illustrates a stronger fascination for fashion. A strong driving force for consumption as well as fashion is novelty. Campbell (2015) discusses how the accelerating pursuit of the new is driving hyper-consumption.

Furthermore, consumption is important in the construction of identity (e.g., Gianneschi and Sörum 2022). Social comparison is yet another driving force for consumption. Bauman (1998) argues that consumption has replaced work as a social marker (Bauman 1998). Consumers are influenced by other consumers, and it can result in an increase in consumption and debts (Frank 2007, 2011). Frank (2007) called the fact that the American middle class copies the American upper class for luxury fever. It leads to that the upper class update their consumption to stay unique which in turn leads to that consumption accelerate. He gives the example of the barbeque grill. In Sweden, barbeque grills, but also wood decks have become important status symbols over time. It appears as if building a wood deck attached to a house has developed into a cultural norm. It is relevant to ask to what extent the consumer's choices of wood products are dependent on ideas and knowledge of the forest and its wood products. Wood can be considered as genuine

material, but it can also be interpreted as a waste of resources to use wood if trees are considered to be kept growing in the forest.

In contemporary consumer culture, it is generally considered better to purchase new wood products for building and restoring rather than reusing old wood. One reason is the relatively low prices of new wood products. Will consumption patterns change if prices increase? Will more information about forests and its relation to climate change lead to changing consumption patterns? Several studies have over the years focused on the attitude-behaviour gap in trying to understand why people consume as they do and for promoting environmental behaviour (e.g., Park och Lin 2020). The role of consumption in constructions of identity and as a social marker makes it necessary to adopt a cultural logic of consumption (e.g., Arnould and Thompson 2005) that provides a more in-depth understanding of consumption patterns and lifestyles related to wood products and their origin in the forest. Furthermore, the responsibility of sustainable consumption is not only that of consumers (e.g. Moisander 2007), but all actors in society.

A Mythological Logic
A mythological logic of the forest is represented in art and literature throughout the years. For example, a Swedish painter, John Bauer illustrated fairy, trolls, and folk tales in his paintings. Spiritual discovery is also discussed in relation to the forest. For example, Henry David Thoreau described his life in the forest in the United States in the book *Walden* published in 1854. The relation to the forest sometimes resembles some sort of religion. A professor in religious studies, David Thurfjell (2020) discusses how nature has been considered religion throughout history as well as today when Sweden can be considered a secularized nation.

The tranquility among trees is attracting people to find the calmness in the forest. One example is "forest baths" which is a new way to experience the forest with all senses (SVT Nyhter 2023). According to the forest bath guide, Lars Åström, it is about smelling the moss, feeling the tree trunks, and to move slowly with a wide field of view of the forest. He argues that it is, in particular, old forests that provide relaxation and soothing. Forests over 70 years old offer a special calmness. They have wood wide web which means mykorrhiza and insects under the ground. The German forester Peter Wohlleben (2016) writes in the book *The hidden life of trees* how trees communicate with each other.

A Social Logic
Increased welfare and urbanization have probably contributed to that the forest has became more important for recreation and social exchange. In Sweden, the Right of Public Access or Outdoor Access Rights was established after the Second World War. It gives people the right to walk, ride, ski, bicycle, or camp on any land except for private gardens, near a dwelling house or land under cultivation. It also gives people the right to pick flowers, berries, and mushrooms in the forest. More organized expeditions to the forest were intiated and arranged during the 1950s, for example, expeditions to pick and learn about mushrooms. In 1957, an organization, Friluftsfrämjandet, started to arrange meetings in the forest for young children. Play and imagination is encouraged and a character, Skogsmulle, is dressed as a troll singing and telling stories about the nature. Friluftsfrämjandet also arranges field trips for the family. Other organizations encouraging interest in the forest are, for example, Fältbiologerna (Field biologists) established in 1947.

A Production Logic

The forest has for a long time been important for production. People have relied on wood products for building houses and wood has been used to heat houses. Farmers and industries have historically also been dependent on wood for production. For example, glass factories in Sweden were located in areas with larges forests. Industrialization introduced chain saws, horses were replaced with tractors, sawmills and paper mills were developed and expanded. Forest machines and timber trucks have become bigger and more efficient, but are also causing environmental damage. The dependency of fossil fuel in the forest industry is problematic. Fertilizers and pesticides are controversial issues. Discussions on efficiency and how long it takes for trees to grow and be harvested are on-going.

It is important to better understand how forest owners think of and relate to production, but also to consumption of wood products. Industrialization led to a separation between forest owners and consumers (e.g., Campbell 2005), but they influence each other in the way they value, think of and act in relation to the forest and its products.

An Economic Logic

The focus on economic growth has been highlighted parallel to the development of consumer culture. The economic system is dependent on GDP that is connected to growth, and this explains why politicians for a long time have been interested in increasing consumption. The forest represents a large share of Swedish exports and the forest industry as well as the Swedish state is therefore concerned about the revenue. Furthermore, the revenue is a concern for most forest owners. Many private forest owners have small forests that are important for their businesses as it has become more difficult to run a small agricultural farm. The economic logic is also highly prevalent in discussions of consumption of wood products and buildings. In general, low prices have been given high priority and led to accelerated consumption over time. Even though it has been argued that increased consumption is not sustainable in the long run (e.g., Jackson 2009), the economic logic is highly prevalent in contemporary society.

A Political Logic

Over the years, a political logic has become even more visible in Swedish forests parallel to the membership in the European Union (EU). The EU's opinions about the role of the forest for combatting climate change and promoting biodiversity is drawing attention among all actors interested in the forest. Issues of concern are to what extent the European Union's opinions about the forest should be legislative or non-legislative for its member states. Politicians have different opinions about the role of the forest as well as owners and producers of wood products. In 2020, in Sweden, 48 percent of the forest is owned by private owners, including sole traders (Skogsstyrelsen 2020). Persons who run a limited liability company own about 24 percent of the forest. The state and companies run by the state own about 21 percent. The remaining 7 percent is owned by the state and private owners. Even though there are laws regulating how forestry is practiced with consideration to the climate change and economic incentives as well as informative campaigns, education and research, the political discussion in Sweden has to a large extent focused on freedom with responsibility.

Previously, Dolan (2002) expressed: "Essentially, the goal of sustainable consumption needs to be seen as a political project, recognizing the power relations between social groupings (capital and labor, the state and sectional interests and alliances, business and consumers) and between cultural value systems (environmentalism and consumer sovereignty, capitalism and socialism, collectivism and individualism)." The complexity of different values and power relations among all actors interested in the role of the forest needs to be recognized and researched.

Conclusion
The forest and its products can be looked upon in different ways in the move towards a sustainable society. One way is to consider it as a repository for human development in a similar way as the ocean has been regarded over time. This means that the forest should be used for consumption of wood products, as a source of energy, for building houses and wood decks, biofuel for driving cars, producing paper, packages or knitting yarn. To what extent are innovations based on the forest seen as a solution to climate problems? Another way is to leave the forest as it is and let the trees stay in the forest. These two paths can be seen as opposite routes, but there are also cross-paths and sideways to consider in the complex discussions of the role of the forest. Different actors may have different interpretations of whether the paths are leading forward or backwards.

The role of the forest in the move towards a sustainable society is relevant and important to discuss at times when we are facing severe climate change. Different logics representing different views of the forest and its relation to consumption practices are important to understand in a consumer culture where climate change is strongly connected to consumption. It is important to critically ask how consumption practices become legitimate over time.

Studies with a macromarketing perspective is necessary in that they illustrate the complexity of the different views, negotiations, and power relations between different actors interested in the forest and its products. Overall, the role of the forest and its products in our society, historically, today and for generations to come need more attention in macromarketing research.

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Consumer Preferences and Circular Economy: The Case of Reusable Packages

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Circular economy (CE) paradigm has gained much attention recently. Implementing a CE in the Fast Moving Consumer Goods (FMCG) market requires the buy-in from consumers who are the key players on the demand side buying environmentally friendly products and as well as in the reverse logistics returning used products to the manufacturers. Our first objective is to understand consumers' preferences in the context of reusable packages. We specifically focus on the case of beverages such as soft drinks. To this end, we use an online survey together with a Conjoint choice-based experiment to measure consumers' preference and willingness to pay for the drinks sold in reusable packages. Moreover, we investigate the heterogeneity in preferences and contrast the self-reported and actual behavior of consumers. The second objective is to measure the effectiveness of different incentive schemes for post-consumer package return. According to our results, while the price of product is a major factor affecting the choice of consumers, they prefer reusable packages over the disposable ones. Based on this, we could analyze the delicate trade-offs that manufacturers are facing in introducing reusable packages. The insights from our study would have implications for the manufacturers and policy makers in moving to the direction of circular economy in the FMCG market.

Introduction

Under continuous depletion of natural resources and high levels of environment pollution, it is imperative for businesses to take initiatives to achieve profitability while protecting the environment. Firms are under increasing pressure from the public and governments to become more environmentally-responsible and to adopt sustainable business practices (Raj et al. 2020). Circular economy (CE) paradigm has gained much attention recently (Calzolari et al. 2022). The aim of CE is incorporating sustainability into the economic structures resulting in social and environmental benefits (Mishra et al. 2022). While the top-down role of government is vital in transition towards CE, bottom-up efforts by supply chain managers are also essential (Bressanelli et al. 2019). One of the emerging sustainability initiatives, under the umbrella of CE, is product recovery or reverse logistics (Hazen et al. 2021; Wang et al. 2017). This practice, not only reduces the amount of waste, some of which contains hazardous material ending up in the landfills, but also saves the natural resources by either reusing or recycling the recovered products (Minunno et al. 2020).

In the FMCG market, using reusable glass containers instead of plastic ones reduces solid-waste generation and environmental impacts by at least 50% and reduces the eco toxicological and greenhouse gas emissions of the bottle production process (Ponstein et al. 2019). To be implemented successfully, there is a need to understand consumers' preferences in order to see to what extent they would be favorable of such reusable packages and how much they are willing to pay extra for those (Ketelsen et al. 2020). This becomes more important given the higher price of reusable containers as compared to the conventional packages (Rausch et al. 2021). In most of the markets, there is a need for some form of incentives to motivate consumers to take part in sustainability initiatives (Mogale et al. 2022).

In this paper, we study consumers' preferences for reusable packages. We specifically focus on the case of beverages such as soft drinks or beers in the FMCG market. To this end, we use an online survey together with a Conjoint choice-based experiment to measure consumers' preference and willingness to pay for the drinks sold in reusable packages. Moreover, we investigate the heterogeneity in preferences and contrast the self-reported and actual behavior of consumers. Lastly, using the results of the Choice-Based Conjoint experiment, we measure the effectiveness of different incentive schemes for post-consumer package return.

Literature Review

This paper spans two streams of literature. Due to the focal role of the consumers in the success of sustainability initiatives pertaining to product packages, we survey the past studies on consumers' willingness to pay for green packaging. Secondly, we review the literature on incentive mechanisms and their impact on the sustainable sopping behavior of consumers.

Consumers play a major role in the success of sustainability initiatives by the business to consumer companies. There is a rich literature on the pro-environmental behavior of consumers and its antecedents (Rausch et al. 2021). It has been shown that eco-friendliness is desired by consumers in general. However, since price is usually an important factor for consumers, there is a need to study the interrelationship between price and other product attributes such as packaging (Orlowski et al. 2022). Moreover, Zhang et al. (2019) claim that there is a gap between intention and actual behavior of consumers. As such, there is a need for a research methodology to incorporate these discrepancies in consumer behavior in the context of green packaging.

Implementing a CE using reusable packages requires the utmost collaboration between the firms in the supply chain and the consumers who are the key players in the reverse logistics (Gaur and Mani 2018). While the forward flow is triggered upstream by the suppliers of raw material, the reverse flow is initiated downstream by consumers. Companies may be reluctant to invest in the CLSC if consumers are not keen to take part in this sustainable initiative (Roca et al. 2020). Therefore, it is imperative for the supply chain managers to incorporate sound incentive mechanisms into the design of the CE (Mogale et al. 2022).

This paper contributes to the literature in few ways. It aims to shed light on the factors affecting consumers' pro-environmental purchasing behavior in the context of green packages (Hao et al. 2019). We answer the call to measure consumers' willingness to pay in a realistic setting by utilizing the choice-based conjoint method (Rausch et al. 2021). Besides, to fill the gap in the literature, we contrast the self-reported behavior and the actual behavior of consumers (Martinho et al. 2015). Finally, we investigate the impact of monetary and non-monetary incentive mechanisms on the return of empty reusable packages which has implications for supply chain managers and policy makers (Nocolau et al. 2022).

Methodology

Considering the central role of consumers in the green initiative, we designed an online survey coupled with the choice-based conjoint experiments conducted to understand the preference of beer consumers when it comes to reusable packages. In the survey, respondents were asked about their sustainability-related habits and their willingness to pay for sustainable products in addition

to their socio-demographic characteristics. The items used in the survey were based on Tully and Winer (2014). In the choice-based conjoint experiments, we ask the participants to indicate their preferred choice among the realistic beer options. Based on the opinion of the local retail experts and in line with the previous studies (Muggah and Mcsweeney 2017; Spence et al. 2020), the main relevant factors identified include brand name, type of bottle, bottle return incentives, and retail price[5]. For each factor, three realistic levels were selected. The conjoint design is presented in Table 1.

Table 1: The Design of Choice-Based Conjoint Experiment

Attributes / Levels	Level 1	Level 2	Level 3
Brand	Local Beer A	Local Beer B	Imported Beer
Bottle	Disposable	Reusable	Reusable
Incentive	-	Get Back LBP 250 Deposit	Receive 10 Reward Points
Price (LBP)	1500	1750	2000

The next task was to combine the levels of each factor and to come up with a list of hypothetical conjoint profiles to be evaluated by the respondents. In order not to put a burden on the respondents, we used the orthogonal array method to reduce number of profiles to 9 (Addelman 1962). The subsequent issue is to group those profiles into choice bundles to be used in the choice based conjoint method. Given the conjoint design above, and using the cyclic method under the balanced incomplete block (BIB) designs to restrict the number of choice sets (Louviere et al., 2008), we end up with 9 choice sets each having three profiles (i.e. $3^3/3/9$ design). This design has the three desirable properties of level balance, orthogonality, and minimal overlap (Huber and Zwerina 1996). For illustration, one of the choice sets used is shown in Figure 1[6].

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[5] Since our focus is on the type of beer bottles (reusable or not), we abstract away from other factors like beer flavor or color.

[6] The brand names are masked here. In the choice experiments, respondents could see the band names.

Figure 1: An example of the administered CBC choice expriments

Attribute	☐ Option 1	☐ Option 2	☐ Option 3
Brand	Local Beer B	Local Beer A	Imported Beer
Bottle	Disposable	Reusable	Reusable
Incentive	N/A	Get back LBP 250 Deposit	Receive 10 Reward Points
Price (LBP)	1500	1750 + 250*	2000

*You will receive your LBP 250 deposit back when you return the empty bottle to the retailer.

The sample includes 245 students and staffs of a major university in the MENA region. The respondents had to be beer drinkers to participate in the study. The survey was administered online via Google Forms.

Results

Based on the survey results, on average respondents have high sustainability concerns and actively practice in recycling or sustainable purchasing behaviors. On average, respondents have positive attitude toward buying recyclable and reusable packages. In contrary, respondents have reported low involvement in bringing reusable shopping bags to supermarkets. When it comes to willingness to pay for sustainable products, respondents on average are willing to pay 30% more to buy products that environmentally friendly and sustainable. This is in line with the findings in the extant literature (La Fuente et al. 2022). While the results of the survey show consumers' positive attitude towards sustainable products and their willingness to pay higher prices to buy those products, it may not predict what consumers do when shopping for products in reality. To this end, we used Choice-Based Conjoint analysis as an established tool to complement the results of the survey results.

After cleaning the data of the conjoint experiment, the choices made by each respondent were fed into a multinomial logit model to estimate the parameters of the choice model. The results of the estimation are given in Table 2. The results show that the respondents are price sensitive in general. In other words, increasing the price of beer by one unit, would decrease the choice probability by -0.001 units. As per the bottles, the respondents prefer the reusable bottles to the disposable ones. While the respondents in general prefer local brands to the imported beer, the brand effect is not significant.

Table 2: Coefficient estimates of the conjoint experiment.

Variables / Coefficient estimates	Coefficient estimates	Standard deviation	t-statistic
250 LBP Deposit-Refund	**1.581**	0.076	20.684
10 Shopping Points	**1.077**	0.068	15.772
Price	**-0.001**	0.000	-12.247
Local Beer B	0.231	0.063	3.666
Local Beer A	0.883	0.058	14.981
Imported Beer		n/a	n/a
Pseudo R Square	0.168		
AIC	4080		

Note: Coefficients in bold are statistically significant.

Based on the results, respondents were willing to pay between 50% to 73% more to buy reusable bottles instead of reusable bottles. These were considerable higher than the WTP numbers based on stated preferences. Our results indicate that females are in general more concerned about the environment. So, despite the high cost of the reusable bottles, manufacturer can sell them at higher price, benefiting from an additional demand attributed to consumers who support eco-friendly packages. This is a good news for the managers planning to implement CE as they can be more environmentally sustainable without challenging their bottom line.

In terms of incentives, using the reusable bottle with a returnable deposit would increase the likelihood of choice by 1.58 units. Similarly, using a reusable bottle with 10 shopping points incentive would increase the choice likelihood by 1.07 units. As such, the bottle deposit policy outperformed the reward points policy. Although we have used two incentives, namely deposit-refund and reward points, the model can accommodate more incentive schemes. The manufacturers together with retail managers should decide which incentive shall be implemented in each market depending on the type of consumers served.

Conclusion
According to our results, while the price of product is a major factor affecting the choice consumers, they prefer reusable packages over the disposable ones. This underlines the delicate trade-offs that manufacturers are facing with, when they want to increase the price of reusable packages for the final consumers. In this regard, our prosed method is able to answer such

questions by allowing managers to perform what if analysis on the impact of final price on demand.

Our results show the possibility of increase in profitability of the supply chain under the reusable package initiative. This is in line with the findings in the literature (Lopes Silva et al. 2013). This improvement is due by the additional demand from consumers attracted by the eco-friendly product and a return policy that motivates them to return the empty bottles. If planned properly, this will enable the FMCG supply chain managers to achieve profitability and environmental sustainability at the same time.

Besides, our results highlight the importance of selecting the incentive mechanism for the consumers to return the post-consumption packages back to the supply chain. Setting low incentive prevents the implementation of CE by reducing the returned post-consumer packages and setting high incentives may make this initiative unprofitable for the manufacturers. This underlines that the success of such CE initiatives would require sound government policies and incentive programs (Khosroshahi et al. 2021).

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Neo-Liberal Governmentality as Marketing System Failure: Case of Stubble Burning in India

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This work-in-progress paper explores how governmentality as policy framework fails to reconcile the conflicting aims of agricultural input cost reduction by individual market actors (i.e., farmers) and the government's aim to control the practice of stubble burning in the Northwestern province of India. We argue that it leads to the marketing system failure through undesirable system outcomes like environmental degradation and consequent reduction in the well-being of people due to the poor air quality, which poses a severe threat to climate and public health.

Marketing systems are ubiquitous - from the evolutionary tribal society to ultramodern western economies (Layton 2011). Marketing systems have multilayered, multiagent, and multi-participatory complex structures (Davey, Johnstone, and Williams 2021). Though marketing systems play an incessantly significant role in societal well-being and are considered pivotal in macromarketing studies, they are susceptible to macrolevel failure on account of ineffective regulatory policies (Carman and Harris 1983; Raymond 2018) governed by neoliberalism (e.g., Jagadale and Roy-chaudhuri 2021). Neoliberalism is the concept of governmentality par excellence which seeks to encourage governance through free market mechanisms and minimum intervention (Berry 2014; Foucault 2007; Belk, Skalen, and Varman 2012). Although freedom is its central rhetorical argument, neoliberalism encourages entrepreneurialism to control the conduct of citizens (Belk, Skalen, and Varman 2012). Furthermore, this established discourse of neoliberalism promotes welfare aligned to privatization and a free market economy (Varman, Skalen, and Belk 2012). Few researchers have commented that neoliberal discourse has been bulldozing those institutions which promote egalitarian distributive measures (Harvey 2007). Moreover, it has been argued that the state has shrunk its role as a stakeholder of common welfare for the last twenty years in developing economies like India (Belk, Skalen, and Varman 2012; Patnaik 2006; Patnaik 2007). We explore this neo-liberal governmental paradox between state and private market actors to show how it leads to the marketing system failure.

Drawing from Layton's (2015) theoretical framework of mechanisms, actions, and structure (MAS), we extend our argument concerning neoliberal discourse and marketing system failure. From Layton's theory perspective, the marketing system is an inclusive and more prosperous concept than the neoliberal notion of economic exchange (Chakraborty, Jagadale, and Kadirov 2018; Polanyi 2001). Moreover, three components of MAS theory, which are social mechanism, action fields, and structures, together exhibit formation, growth, and adaptive change in marketing systems on account of economic exchange in and between human communities (Layton 2015). However, the influence of neoliberalism results in deformed marketing systems leading to the failure of the marketing system as a whole. It is on account of the lack of a robust policy framework from the government and the lack of participation by market actors to resolve the issues, both challenging the basic assumption of neoliberal ideology. Arguably, governmentality is required to bridge the competing aims of the actors involved, like the state

and market. In this case of stubble burning the state's goal is to control it while independent actors (farmers) aim to reduce the farming costs by burning stubble. This quandary leads to marketing system failure in the form of undesirable output like environmental degradation and reduced well-being.

We undertake a qualitative study in the northwestern province of Punjab in India bordering Pakistan. We plan to conduct semi-structured interviews with various stakeholders, including farmers, government officials, policymakers, etc., in the province of Punjab. India is considered a farming nation with extensive cropping patterns i.e., diversity of crops and intensive cropping where land is generally not kept fallow throughout the year. These provinces, including Punjab, follow the monoculture of harvesting wheat and rice in rotation from May- June till the end of the winter season every year (i.e., March). These provinces, particularly Punjab, are infamous for burning straw and stubble at the end of the harvesting cycle (Porichha et al. 2021) to prepare the field and reduce the next cropping cycle's turnaround time. About 83Mt of stubble which is 23.86% of the total stubble, is burnt immediately after the harvest resulting in a layer of haze in the environment in the winter season in northern India (Abdurrahman, Chaki and Saini 2020). During this time, major north Indian cities, especially Delhi, the national capital region (NCR), experience severe air pollution with an air pollution index greater than 400 (severe category). It causes severe injury to public health and the environment (Abdurrahman, Chaki, and Saini, 2020). For instance, stubble burning causes acute air pollution, deadly diseases (like cancer, asthma, bronchitis, etc.), high mortality rates, reduced soil fertility, public health crises, and negative impacts on climate and economic development, which leads to macro-level marketing system failure (Abdurrahman, Chaki, and Saini 2020; Williams, Davey, and Johnstone 2021). In order to control the effect of stubble burning on external factors like the environment and public health and well-being, many activists have suggested cash reparation and crop diversification as judicious solutions; however, the government is working in a different direction (Gupta 2022).

Our initial discussion with the farmers leads to our understanding that farmers have no incentives and wherewithal in the form of scientific and market resources to dispose of the stubble. It is because of reduced productivity over the years, and indirect price controls of farm produce (especially staples like wheat and rice) by the government. Farmers get minimum support price (MSP) for these crops (wheat and rice). Thus, they continue to grow similar crops for generations. They have minimum incentives to diversify the cropping pattern. Thus, unfortunately, stubble burning in north provinces of India is currently back with concerns for citizens, government authorities, and policymakers. Finally, we draw theoretical implications of how neo-liberal governmentality leads to the marketing system failure. Here, conflicting governance aims like MSP on one side (that assures farmers of minimum income) and scientifically disposing stubble (which requires resources e.g., time and money from farmers) create undesirable system outcome in the form of environmental degradation. We based on the findings provide policy implications for enabling policy intervention to control the menace of stubble burning.

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Buying Utopia: An Exploratory Study of Sustainable Fashion

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Introduction

Promoting sustainable consumption has become a critical concern for various stakeholders, including activists, policymakers, and marketers (Gonzalez-Arcos et al. 2021). Despite concerted efforts to address the negative impacts of the fashion industry, such as environmental pollution, labor exploitation, and resource depletion, sustainability remains elusive (Atik and Ertekin 2020a; Johannsdottir and Thorisdottir 2020). The challenge is further exacerbated by the strong demand for fast fashion from mainstream consumers, which hinders the growth of sustainable fashion brands and their advocates (Atik and Ertekin 2020b). Despite these obstacles, a small segment of consumers remains steadfast in their commitment to sustainable fashion. This study aims to explore the drivers of their persistence and determination.

Sustainable fashion refers to a practice that seeks to minimize the negative impact of fashion products on ecological integrity, society, and human wellbeing (Mukendi et al. 2020). Existing studies examine the impact of advertising attractiveness (Reich and Soule 2016), social trends (Coulter, Salnikova, and Strizhakova 2022), brand resonance (Habib, Hamadneh, and Khan 2021), brand attachment (Chen et al. 2017) and brand community (Kim and Park 2015). However, little is known about how consumers form their belief and make their choice in sustainable fashion vis-à-vis prevailing social norms and peer pressure. The objective of this study is to uncover why this group of consumers persist in prioritizing sustainability in their fashion choices.

This study uses the theoretical lenses of utopia and heterotopia to analyze the focal phenomenon of sustainable fashion. Utilizing these concepts not only aids in comprehending consumers' relationships with sustainable fashion, but also serves as a macro-level framework that connects individual actions with broader societal and market trends. Utopia describes a "good place" of spiritual existence but "no place" of physical nonexistence (Atanasova 2021; Foucault 1986, p. 24). Heterotopia refers to "places outside of places" in the real hegemonic society (i.e., heterogeneous space), which has a "curious property of being in relation with all the other sites, but in such a way as to suspect, neutralise, or invert the set of relations that they happen to designate, mirror, or reflect" (Chen 2021; Foucault 1986). By incorporating utopia and heterotopia, this study aims to effectively explain the paradox and presence of sustainable fashion.

The context of our study is sustainable fashion in China. The Chinese fashion market has experienced rapid growth, with a projected revenue of 310 billion USD by 2023 (Statista 2022b). A small number of sustainable fashion brands have emerged and gained attention from Chinese consumers. This presents an ideal opportunity to examine our main research question: How do consumers engage with sustainable fashion through purchase, consumption, and relationship building in a market characterized by fast change, low price, and unsustainability?

We employed semi-structured in-depth interviews in this study. We conducted interviews with 14 individuals between the ages of 20 and 34, who represented different stakeholders within the Chinese fashion industry. The first five participants were recruited through personal contacts and advertisements on social media, with subsequent participants being recruited via snowball sampling. Some informants were interviewed more than once, which allowed us to address follow-up questions. The interviews were conducted in Chinese by the first author and ranged from 45 to 95 minutes. Participants were given an e-gift card from a sustainable fashion brand. All the interviews were transcribed, resulting in a total of 209 pages of double-spaced text.

Our findings highlight the role that consumers' idealized visions of sustainable fashion, both in terms of utopian and heterotopic perspectives, play in reinforcing and advancing their sustainable consumption habits. Consumers are able to align personal values with purchasing decisions, thereby furthering their commitment to environmentally and socially responsible fashion choices. We identify the functions of utopia, the themes of heterotopia, and the subsequent behavioural outcomes (Figure 1).

Figure 1. The functions of utopia, themes of heterotopia, and subsequent behavioural outcomes
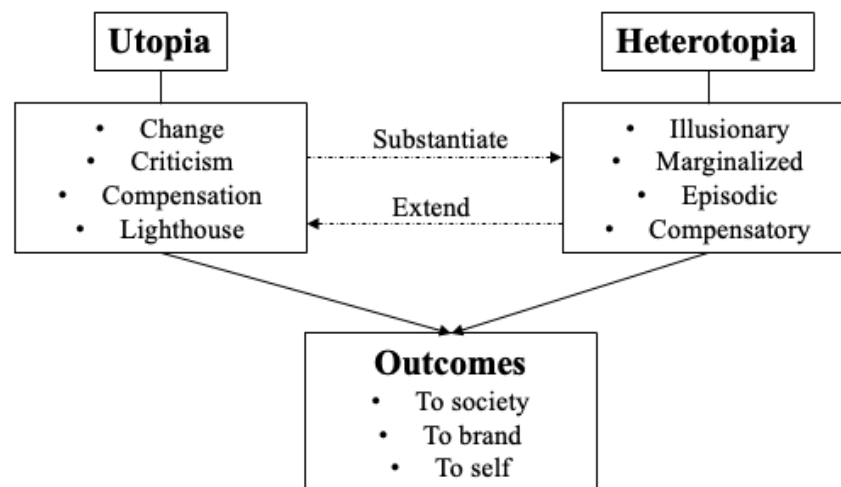
Utopia

Previous studies have identified utopia's functions as change (Kozinets 2001; Levitas 1990), criticism (Boldero and Francis 2002; Sherry 1998) and compensation (Fernando et al. 2018; Levitas 2011). In addition to these three functions, the current research identifies a new function: lighthouse.

The term "lighthouse" is used to symbolize sustainable fashion brands, as they serve as guiding lights for consumers towards a more sustainable future. These brands embody consumers' optimistic aspirations and beliefs in the future of sustainable fashion, while also reminding consumers to stay vigilant against unsustainable practices and resist the influence of unsustainable market forces. The lighthouse symbolizes the collective efforts being made to foster a more responsible and sustainable fashion industry.

Heterotopia

The study of heterotopia in the marketing discipline concentrates predominantly on its fundamental principles, which identify the specific environment that can be designated as a heterotopia. Six principles have been recognized, including (1) ubiquity, (2) historicity, (3) heterogeneity, (4) temporality, (5) porosity, and (6) dialogical/relational function (Roux, Guillard, and Blanchet 2018). However, it is still unknown about heterotopia's intrinsic nature and its significance to consumers. By analysing consumers' touchpoints of sustainable fashion brands, such as physical stores, brand autobiographies, websites, and online communities, we uncover the key characteristics of heterotopia in the context of sustainable fashion.

Heterotopia's characteristics include: (1) A place of subjective illusion, where consumers experience the brand's interpretation of sustainability in a unique and personal manner; (2) A marginalized place that challenges the dominant norms of the current fashion market and subverts its order; (3) An episodic space of sustainable consumption that transcends time and place and allows consumers to temporarily escape unsustainable practices; and (4) A place of compensatory escape that provides refuge from unsustainable practices and shields consumers before they return to the dominant fashion market. These findings provide valuable insights into the role that sustainable fashion heterotopias play in shaping and reinforcing sustainable consumption.

Substantiating (from Utopia to Heterotopia)

Sustainable fashion heterotopia serves a dual role for consumers, functioning not only as a place for them to learn about and engage with sustainable fashion brands, but also as a tangible embodiment of their utopian aspirations. As consumers already have an idealized vision of sustainable fashion, heterotopia offers them a touchstone to connect with their fantasy and bring it closer to reality. It serves as a bridge between the unattainable ideal of utopia and the suboptimal realities of the world, offering consumers a solution that aligns with their values and aspirations.

Extending (from Heterotopia to Utopia)

Our research indicates that even those with limited prior knowledge of sustainable fashion can benefit from experiencing heterotopia. By exposing individuals to the unique features of sustainable fashion, heterotopia can help raise consumer awareness and understanding of the

differences between sustainable fashion brands and other fashion brands. Through their experiences in heterotopia, consumers can begin to formulate their own framework for sustainable fashion, serving as a steppingstone towards the ultimate realization of their utopian vision. This process of meaning transfer involves active engagement and reflection on the part of the consumer, as they engage in interpretive dialogues and critically examine their relationship with consumer society and unsustainable consumption practices. Heterotopia therefore plays a crucial role in guiding consumers towards more responsible and sustainable consumption habits.

Contributions in Brief

First, our research contributes to the theory of utopia and heterotopia. We illuminate the utopian functions and identify a new function (lighthouse) in our study. These functions provide insights into how sustainable fashion consumers experience a sense of belonging and empowerment, despite feeling marginalized by both the market and society. By incorporating the functions of utopia, we deepen the understanding of how sustainable fashion ignites consumers' passion, imagination, and aspiration. In terms of heterotopia, we illuminate its four characteristics to supplement the existing literature.

Second, previous consumer studies often conflate the concepts of utopia and heterotopia, exemplified by the cases of Burning Man and its community (Kozinets 2002), festival shopping centers (Brown and Maclaran 2005), and theme parks (Belk and O'Guinn 1989). Although these authors examine the phenomena as utopian, it is important to recognize that their conceptualization of space/environment aligns more closely with heterotopia. By situating the concepts of utopia and heterotopia within our research context, we provide a nuanced understanding of these two concepts. We delineate their definitions, principles, and functions in the sustainable consumption context.

Third, marketing research often examines sustainable consumption as a micro-level single-actor phenomenon, either by encouraging consumers to adopt specific behaviors or by changing retailers' marketing strategies (Claudy Peterson and O'Driscoll 2012; Ekström and Salomonson 2014; Joy et al. 2012). However, through our interviews with individuals who play multiple roles (consumer-designer, consumer-producer, etc.) in the fashion system, we find that sustainable fashion needs a macromarketing perspective to mobilize changes across societal entities. Our analysis of macromarketing practices is divided into two distinct time periods for discussion.

In the short term, while the Chinese government has introduced circular economy policies, financial subsidies, and social awareness initiatives to promote sustainable fashion in the market, these interventions have primarily benefited larger sustainable fashion corporations (The World Bank 2022). Small start-ups and their supporters have been marginalized and neglected within the market. To address this inequality, we propose that the current market structure needs to be reconfigured to align with utopian ideals (e.g., decentralization and equality). This practice could foster greater public interest in sustainable fashion and create a conducive environment for the further and deeper consumer engagement.

Over the long term, our findings highlight the duality of sustainable fashion, encompassing both idealistic (utopia) and practical (heterotopia) aspects. Given that people's understandings of the utopia and heterotopia are influenced by their individual perceptions of brand culture and social

norms, it is evident that sustainable fashion engagement cannot be considered as a singular task for consumers. Instead, it is imperative to recognize sustainable fashion as a collective effort involving various stakeholders in the fashion system—including supply, demand, and regulation—to share the responsibility and foster sustainable practices.

Finally, we suggest that marketers can capitalize on the meaning of heterotopia in the minds of consumers. By elevating the overall experience of physical stores through a curated atmosphere that brings together diverse cultural, historical, and geographical elements, sustainable fashion brands can effectively enhance the perception of heterotopia. In addition, the use of virtual spaces can serve to strengthen consumer engagement with the brand. To maximize the potential of these spaces, sustainable fashion brands should strive to create a unique "inverted space" that distinguishes the brand from other fashion brands. This sense of inversion, or difference from the outside world, will increase consumer engagement and strengthen their connection to the brand.

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Climate Change in The Classroom: We'll Get By With A Little Help From Our Friends

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Background to the study

Our climate is changing at an accelerating rate as a result of human activities (IPCC, 2021). As we write, somewhere in the world extreme weather will likely be demolishing infrastructure, devastating lives, and destroying people's sense of security. Hail Mary solutions such as sunscreens made from moondust (Milman 2023) will not save humanity from the worst effects of a take-make-waste society that destroys natural capital (IPCC 2021; Science Media Centre 2021). We must transition urgently to a net zero emissions, circular economy. This paper is a first attempt to evaluate marketing educators' support in this transition.

Marketing is in the hot seat. Climate change results from overconsumption, in turn a result of logics of growth, competition, and individual choice, taught to generations of marketers (Cabrera and Williams 2014). Those logics are under pressure as business schools adopt Principles for Responsible Management (PRME) and the UN Sustainable Development Goals (SDGs). For marketing to walk that particular talk, we must carefully scrutinize what and how we teach in order to support urgent transition (Helm and Little, 2022; Parvatiyar and Sheth 2021). Understanding how marketing faculty collectively approach that transition is an important first step. Building on Kemper, Ballantine, and Hall's (2020) research on sustainability worldviews, this study provides an initial benchmark for tracking change in marketing education practice with respect to climate change.

While casual observation reflects little change in regular marketing curricula, macromarketing educators are having a moment. Pedagogy was a highlight of the 2019 Cleveland macromarketing conference (Shapiro et al. 2021). Sustainability-oriented education approaches also featured in a recent special issue of the *Journal of Marketing Education,* with the editors making a strong argument for overhauling what we teach (Kemper et al., 2022). However, innovating standalone courses is one thing (e.g., Brocato et al. 2022; Shapiro et al. 2021), and innovating fundamentals courses is another. For example, we applaud Watson et al.'s (2021) creative design incorporating both micro and macro components in an ambitious weekly schedule of materials, activities and visiting faculty. However, is a complex delivery doable for less experienced faculty? How might students might respond to the workload? As the more experimental among us will attest, innovative deliveries can backfire, leading to poor teaching evaluations and upset students. Also, how might change become programmatic?

We make these observations not as a critique, but as an illustration of the challenges of transforming core curriculum and pedagogy. We also observe that apart from recent contributions (e.g., Kemper et al. 2020), the literature does not offer much insight into whether marketing educators perceive a need to transform. We wonder: (1) To what extent do colleagues outside our macromarketing bubble appreciate the need for change?; and (2) How are marketers collectively addressing this diffuse, multi-disciplinary, fast changing and paradoxical topic in

view of relative silence in the marketing literature on climate change in general, and education practice around climate change in particular? We address these questions, building on Kemper et al. (2020).

Research design

As we are seeking a broad understanding of marketing education practice, we conducted an online survey of marketing academics, focusing on climate change and marketing education. We sampled every top 100 university, and every second other university from the list of AACSB accredited business schools (AACSB, 2022). We scraped email addresses for marketing faculty (300 universities and 2876 email addresses total, average 10 per school). The survey was made available online March to July 2022. We received n = 170 completed surveys which we boosted using a snowball sampling technique, sending the link to our academic networks and receiving an additional n = 30 completed surveys *(Table 1)*.

Table 1: Respondent demographics

	Total Number	Percent
Gender		
Male	94	47.0%
Female	69	34.5%
Other	2	1.0%
Prefer not to say	35	17.5%
Age		
18-34	20	10.0%
35-44	38	19.0%
45-54	45	22.5%
55-64	37	18.5%
65+	25	12.5%
Prefer not to say	35	17.5%
Geographic Location		
North America	58	29.0%
Europe	42	21.0%
Australia/Pacifica	34	17.0%
Asia	26	13.0%
South & Central America	3	1.5%
Middle East	1	0.5%
Africa	0	0.0%
Prefer not to say	36	18.0%
Position		
Permanent	103	51.5%
Temporary	32	16.0%
Tenured	27	13.5%
Other	4	2.0%
Prefer not to say	34	17.0%
Role		
Full Professor	42	21.0%
Associate Professor	53	26.5%
Assistant Professor	26	13.0%
Senior Lecturer	16	8.0%
Lecturer	14	7.0%
Adjunct Lecturer	7	3.5%
Other	8	4.0%
Prefer not to say	34	17.0%
Total	**200**	**100%**

The questionnaire was administered in English and contained four sections: Teaching experience, Teaching practice and climate change, Instructors' views on climate change, and Socio-demographics. With respect to respondents' status of integrating climate change (CC) into teaching practice, we developed a set of five items (e.g., " I am planning to integrate more CC-

related content into my marketing courses"); ten items on possible obstacles preventing teaching about climate change (e.g., "CC is too complex a topic to integrate into a marketing course"), and ten statements on the connections between marketing education, sustainability, and CC (e.g., "My students attach a lot of importance to matters related to CC"). Three expert judges evaluated the items and scales. Ten colleagues from diverse language backgrounds reviewed the revised instrument for ability to formulate a response (Collins 2003; Tourangeau 1984). Space precludes detailed technical description, however descriptive statistics identified overall respondent demographics and worldviews. Cluster analyses, using Ward's method (squared Euclidean distance) followed by K-means (Punj and Stewart, 1983, Hair et al., 2014), was conducted using the enablers and barriers to teaching climate change as clustering variables. The cluster analysis demonstrated a three-cluster solution which satisfied stability and reproducibility conditions (Joe and Qiu 2009). We used NVivo 12 to code the open-ended responses to derive categories and themes (Saldana 2012).

Results
In view of space limitations, we provide 'top line' results. We identified three clusters of marketing faculty: Engaged (34%), Passives (49%) and Unconcerned (18%) *(Table 2)*.

Table 2: Three clusters of marketing faculty

		Clusters[a]			ANOVA (F)[7]
		1	2	3	
X1	I believe that climate change needs to be addressed in marketing courses.	6.6	6.1	3.2	117.250
X2	I believe that marketing students who learn about climate change will benefit from this in their future careers.	6.7	6.1	3.2	146.741
X3	I believe we should offer required courses on climate change.	5.8	5.2	2.0	90.081
X4	I believe that marketing industry and practice will benefit from hiring graduates who know more about climate change.	6.7	6.1	3.5	116.256
X5	I believe that society in general will benefit from marketing students knowing more about climate change.	6.7	6.4	3.8	97.069
X6	I have thought about how to best address climate change in my marketing courses.	6.3	4.5	2.3	100.290
X7	I already integrate climate change-related content into my marketing courses.	6.2	4.2	2.2	104.548
X8	I am willing to integrate more climate change-related content into my marketing courses.	6.3	5.8	2.8	112.991
X9	Climate change is NOT a priority topic in a marketing course relative to other content that I have to cover.	2.8	4.9	6.3	64.264
X10	Dealing with climate change in a marketing class is NOT of interest to my students.	1.9	3.4	4.2	33.350
X11	Dealing with climate change in a marketing class is NOT of interest to my institution/department.	2.2	3.5	3.8	15.339
X12	Climate change is too complex a topic to integrate into a marketing course.	1.6	3.7	4.1	48.956
X13	I do not want to add to my students' worry about their future by addressing climate change.	1.4	2.4	2.9	17.910
X14	I do NOT feel qualified/prepared to talk about climate change in my marketing courses.	2.0	4.6	4.0	56.232
X15	The topic of climate change is too controversial to integrate into marketing courses.	1.4	2.9	3.9	28.762
X16	There's a lack of industry priority on climate change.	3.7	5.0	4.6	7.784
X17	There's a lack of suitable teaching materials on climate change.	3.8	5.6	4.7	19.854
X18	There's a lack of time/resources to add new/change course content.	3.6	5.5	5.0	27.873

[a] Cluster centers based on overall scores where 1 = strongly disagree and 7 = strongly agree. 1 = Engaged, 2 = Passives, 3 = Unconcerned.

[7] P=0.000 for all measures except X16 (0.001)

Cluster profiling revealed no differences between clusters in terms of position type and gender; however, supporting Kemper et al. (2020), we found a relationship between cluster membership and age: Engaged 55-64 and Unconcerned 65+, which translated to more teaching experience. The Engaged were most likely to agree that marketing curricula at business schools should incorporate the topic of climate change, followed by the Passives and finally the Unconcerned. Comparatively, **Engaged** faculty are more likely to integrate climate change (CC) into marketing courses, and less likely to consider there are barriers to doing so (e.g., lack of industry prioritization, suitable teaching materials and time to revise course content). **Passives** believe CC needs to be addressed and are reasonably willing to do so, but are less likely to take action; noting barriers (industry priorities, lack of teaching materials and time). They are less concerned about adding to students' worry levels and CC being too controversial. The **Unconcerned** have lower mean scores for all attributes relating to integrating CC into courses. They are less concerned about adding to students' worry levels, and averagely concerned about CC being too controversial or their qualifications to teach CC related topics. The Unconcerned, on average, are neutral around industry priorities, suitable teaching materials and time for innovating course content.

In terms of personal beliefs about climate change, one-way ANOVA models and Tukey intervals demonstrate that the Passives are less likely than the other segments to perceive that global climate change will harm them personally at some point in their lifetime, and impact their country and community. In comparison, the Unconcerned, on average, perceive the threat of climate to be more remote. Interestingly, the Unconcerned are most likely to agree that their university attaches importance to matters of sustainability, while the Engaged are more likely to believe that their university and students attach importance to matters of climate change. The Unconcerned are also less likely to agree that there is a need for climate change-related content in marketing curricula and that the wider business system is the cause of climate change. Open-ended responses allowed respondents to provide additional insights on their views and practices. Analysis produced seven themes, Systems intransigence, B-Schools under pressure, Discipline under pressure, Soldiering on (research, teaching, service), "I'd do more BUT" (Disclaimers and deficits), Encouragement and inspiration (vs haranguing students) *(Table 3)*.

Table 3: Open ended responses - summary of codes, categories and themes

Themes	Categories	Codes
MACRO – WIDER SYSTEM		
Systems intransi-gence	Ideology, geography growth/overconsumption	Global capitalism, false consciousness, CC ignored, geographic differences, greenwashing, political agendas, growth orientation, overconsumption, UN SDGs
B-Schools under pressure	Student trends Role of B-schools Faculty expectations	Student sensitivities & preferences, international students, B-school action, B-school inaction, greenwashing, UN SDGs, responses to local concerns (e.g. sea level rise) and global concerns (e.g. diversity vs CC).
MESO – ACADEMIC PRACTICE		
Discipline under pressure	Disciplinary trends Curriculum change Internal conflict Need for change	Complexity, crowded curriculum, growth in digital, fundamentals (creating & communicating value), finding solutions, profit and greed vs ESG, lack of attention to CC/ESG, CSR/ ESG, relationship of marketing to society
MICRO – INDIVIDUAL ACTIONS		
Soldiering on (research, teaching, service)	Core ethics and values Research & curriculum topics - consumer/ firm/ systems centric Students – UG & PhD Institutional service	Importance of ethics and values, social responsibility, need to incorporate CC; Sustainability and consumption, collaboration, behavioural spillovers, overconsumption, carbon labelling, CC and competitive advantage, luxury, tourism, technology, green building, new energy, MNCs/transnationals, water, sanitation; Curriculum – circular economy, SDGs, ESG industry practices, greening vs transformation, industry engagement, supply chain disruptions, carbon footprint, mindful/ responsible consumption, overconsumption, recycling, waste reduction; research informed teaching
Disclaimers and deficits (I would like to do more BUT)	Deficits - time, skills, confidence, teaching materials, knowledge; Sustainability-CC relationship,	Faculty knowledge and skills, time pressure, lack of CC materials, perceived technical hurdles, reality of CC, linkages between consumers/marketing/ CC, lack of textbooks, complexity of academic papers, need for change, opaque concepts (overconsumption), student defensiveness (US),

	student sensibilities and sensitivities	
Encouraging and inspiring vs haranguing students	Pedagogy, topics, industry engagement, industry skills required, current events, relevant cases, enquiry vs advocacy, student engagement	Speakers, discussion, simulation (Green Business Lab), sharing, circular economy, graduate students, media reports, top journal papers, SDGs, industry engagement, case studies, vs brainwashing/ greenwashing, encourage critical thinking, macromarketing, choice of topics, textbook lack, Belz & Peattie, stakeholder marketing, research projects, importance of examples and cases, CSR, vs diversity, Youtube videos, controversial materials (Story of Stuff), triple bottom line, consumer biases, sustainability skills required (derived demand)

A sample of indicative comments: *"no marketing on a dead planet"* [Associate Professor, 55-64]; *"staff must take it as a social responsibility [to teach] about major challenges of our time."* [Professor, 65+]. And a reality check: *"I'm interested in enfolding more sustainability-related content into my teaching but … a large barrier is the time to create new materials, and to fit these materials into what are already very dense courses with a lot of important content."* [Lecturer, 25-34].

Conclusions and Implications
While the rather low response rate needs consideration, it is not surprising in view of our attempt to reach a global sample of busy marketing educators via their email inboxes. Nonresponse and our snowball sampling approach may have resulted in some response bias. In this case, our results are likely to overstate educator concerns about climate change, and the size of the Engaged cluster. Additionally, non-English speakers are excluded. Despite these concerns, our results provide a window into wider marketing education practice in English speaking universities, and some sobering evidence. We were encouraged that more than a third of respondents (34%) were in the Engaged group of active and responsible marketing educators. Of the remainder, nearly half (Passives 49%) are not resistant. They are open to change, if the conditions are right. Furthermore, the Unconcerned are approaching the end of their careers given their high average age (65+). We were troubled that Passives and Unconcerned were relatively less worried about adding to students' anxieties. From a mental health perspective, existential threats must be introduced to pedagogy gently (Armstrong et al. 2018). Engaged educators have taken this challenge in their stride.

The message we would like to leave with readers is the conference theme: *"With a little help from our friends."* Our findings suggest that around one third of us are already addressing climate change in our education practice, and 50% are open to change. While it will take a lot of help from colleagues, together we can develop and share practical and approachable instructional materials that will inspire and encourage students in a shared mission of addressing the most critical global issue facing humankind.

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Informational and Educational Interventions and Waste Sorting: Institutional Rigidity Perspective

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This study aims to uncover the effectiveness of informational and educational interventions in waste sorting. These interventions aim to complement infrastructural interventions, raise awareness, and impact behavioral change in waste sorting. Nevertheless, the extant literature offers countervailing insights into their effectiveness. By drawing from institutional theory and through a mixed-methods approach (quasi-experimental, cross-sectional, and qualitative), our empirical triangulation shows that EU-funded waste sorting interventions are, at best, mediocre in achieving their goal. We use a unique sample of EU-funded waste prevention projects in 100 cities and municipalities in Croatia. Our analyses uncover that program design fails to address local governments' unique characteristics and needs and thus fails to impact the significant increase in waste sorting in the long term. While our cross-sectional analysis shows that some interventions are more effective than others, post-hoc interviews further reveal the deficiencies evidenced by the need for a user-centric approach and institutional rigidity in frameworks and policies that orchestrate the funding and provision of these interventions.

Introduction

Waste sorting is one of the priorities in the sustainable development agenda. Recent strategic documents at the supranational level indicate that increasing the rate of waste sorting is one of the critical goals in increasing the recycling of valuable materials and consequently achieving the sustainable development goals (SDGs) (UNECE Online 2022). Henceforth, the benefits brought about by this approach are environmental, social, and economical. That said, while sorting and recycling are on top of the agenda, the global rates, especially in developing countries, still need to be higher and much capacity of municipal solid waste ends up in landfills. According to EU statistics, annual waste generated through various aspects of economic activity amount to around 2.5 billion tonnes, meaning five tonnes per capita waste generation a year, with each citizen directly responsible for producing half a tonne of municipal waste per year (European Commission 2021). Managing waste has become very serious in low-income and low-middle-income countries, where the majority of waste is still in landfills, and there needs to be adequate infrastructure for proper waste management (Jain and Sharma 2020).

To raise awareness and increase the sorting and recycling behaviors among citizens, national governments and supranational institutions (e.g., the EU) introduce various interventions and programs to help local governments deal with this burning issue. Waste sorting has been a thriving area of scholarly interest, and up to date, several systematic reviews and meta-analyses have been conducted on this matter (Geiger et al. 2019; Knickmeyer 2020; Sewak et al. 2020; Spagnolli and Varotto 2017). Within this literature, researchers were interested in how individuals and households make decisions about waste sorting (Wang et al. 2020) and what motivates them to increase waste sorting (Sewak et al. 2020). While the dominant focus is on the behavioral aspects that promote sorting (Geiger et al. 2019), this literature needs to be more comprehensive in studies analyzing the impact of contextual factors on waste sorting and recycling (Geiger et al. 2019). In addition, minimal attention has been devoted to analyzing the

effectiveness of waste-sorting intervention programs and policies (Spagnolli and Varotto 2017; Tian et al. 2022). Studies show that different interventions increase sorting and recycling outcomes (Wadehra and Mishra 2018) and complement behavioral drivers in increasing waste sorting and recycling. However, this literature has some open issues and gaps that must be resolved.

First, the impact of informational and educational interventions on waste sorting is unclear since insights provide some contradictory findings regarding their impact and effectiveness (Liobikienė and Matiiuk 2021; Chu, Gu and Wang 2021). Consequently, the current level of knowledge accumulation creates ambiguity among decision-makers about how effective these interventions are. From an academic standpoint, the inconsistencies likely stem from various methodological issues (Kim et al. 2020). Corral-Verdugo (1997) has shown that self-reported recycling levels did not correlate strongly with an actual and objective assessment of recycling behaviors. Another issue the scholars raises is an exclusive focus on measuring these interventions' instant and short-term impact (Spagnolli and Varotto 2017). Recent literature also makes a bold critique that these interventions, to become beneficial, need time that will allow benefits to surpass the overall costs of investment (Alachevic et al. 2021).

Second, the waste sorting and recycling literature have dominantly focused on descriptive designs and cross-sectional analyses, whereas causal and experimental design studies still need to be available. A situation can inherently create a self-selection bias in which subjects that implement these interventions select themselves into a group, causing a biased sample that can provide wrong estimates of their actual impact. Up till now, only a few studies tapped into an experimental approach to reveal the actual contribution that waste sorting policies have on actual sorting outcomes (Ling and Xu 2021; Tian et al. 2022; Van der Werff et al. 2019).

Third, while the literature shows how certain personal, social, and contextual factors affect waste sorting and recycling, a dearth of discussion exists regarding whether waste-management policies and interventions are effective (Sewak et al. 2020). Notably, there need to be more studies that would take on the focus user's perspective on whether such interventions are meeting their inherent needs (Sewak et al. 2020). Since most such interventions are funded by national or supranational institutions and are guided by specific frameworks, addressing this gap would be of prime interest to scholars and decision-makers at the highest institutional levels. By building on the preceding gaps, this paper aims to provide the answer to the following research questions:

1) Are the waste sorting informational and educational interventions effective in achieving their goals (increase in waste sorting)?
2) In what way could these interventions become more effective?

To provide answers to these research questions, we conduct three studies. We use a unique dataset of 100 city- and municipal-level waste sorting intervention projects funded through EU grants. This dataset is complemented with actual sorting and municipal waste statistics in each city or municipality. By drawing from institutional theory and mixed-methods design, this paper offers empirical triangulation that uncovers the actual performance of waste sorting informational and educational intervention programs. First, with a propensity score matching (PSM) technique, we test whether educational and information interventions contribute to waste

sorting increase by juxtaposing cities and municipalities from our dataset with a control group of cities and municipalities that have not used such interventions. Second, using a cross-sectional analysis of the funded programs, we find that the cities and municipalities that used intervention programs decreased (increased) the share of sorted waste if they pursued more mandatory (recommended) educational and informational activities. Finally, we conducted post-hoc interviews with ten project officers implementing these interventions to illuminate the potential reasons why this occurred. Overall, our study brings novel insights to the literature on waste sorting and the effectiveness of waste sorting intervention programs and consequently brings recommendations to policymakers on making such programs and frameworks that guide them more effective. On the side, we also contribute to the literature methodologically by using empirical triangulation, which gives us more precise indications when intervention programs that aim to change behavior are providing better results.

Literature Review on Waste Sorting Interventions
Over the years, the literature concerning waste sorting has developed within two essential research streams. The first stream was focused on studies investigating individuals' (households') attitudes, norms, intentions, and behaviors to recycle and sort waste (Pieters 1991), whereas the other stream is focused on external stimuli that enhance waste sorting behaviors (Spagnolli and Varotto 2017). The first stream of literature was dominantly shaped around theories of planned behavior (TPB) which have been a frequently used theoretical lens in studying pro-environmental behaviors in general (Yuriev et al. 2021). The studies within this domain focused on attitudes as a crucial starting point influencing an individual's willingness to engage in sorting and recycling behaviors (Biswas et al. 2000; Taylor and Todd 1995; Wang et al. 2020; Zhang et al. 2016; Zhang et al. 2019). Next to attitudes, pro-environmental norms are also found to influence recycling behavior (Videras et al. 2012), meaning that the rates would be higher in communities and regions where recycling and sorting are normal social behaviors. Studies using experimental settings prove that social norms such as a nudge drive increased waste sorting (Dupre and Meiner 2016).

However, scholars became critical of models focusing solely on personal and social factors predicting waste sorting outcomes over time. A comprehensive meta-analysis by Geiger et al. (2019) shows that personal factors better predict intentions rather than actual behaviors. A study by Setiawan, Afiff and Heruwasto (2021) show that more than attaining social norms is required per se and that external interventions are needed to improve waste sorting outcomes. Similarly, Stoeva and Arliksson (2017) argue that attitudes and norms are essential predictors but can not guarantee higher waste sorting if no proper contextual circumstances are met. A similar conclusion can be drawn from Zhang et al. (2019), who argue that the gap between intention and actual behavior can be attributed to the lack of external stimuli in the form of interventions to drive desirable actions.

Primary interventions that are used to promote waste sorting can be broadly classified into economic (e.g., policies such as taxes and subsidies), convenience (e.g., waste sorting infrastructure), and informational and educational (Kirakozian 2016) (Liobikienė and Minelgaitė 2019). The responding incentives work in concert and should be combined to provide the best result (Recshovsky and Stone 2019) within the so-called intervention packages (Nisa et al. 2019). In this line of reasoning, Stern (2020) also argues that behavioral and other interventions

should be coupled to generate higher waste-sorting outcomes. Behavioral interventions have significant but small effect sizes, and when the intervention stops, there are no evident lasting effects in behavioral change related to sustainable behaviors (Nisa et al. 2019). In terms of convenience, the main idea is to get close to users and to provide the necessary infrastructure for users to recycle and sort waste (Bernastad 2014). The essence of economic interventions is to foster recycling by increasing fees and penalties for solid waste collection so that more significant opportunity costs arise if the households decide not to sort and recycle (Huang et al. 2011).

Studies have found that knowledge and informedness are significant facilitators of increased sorting and recycling; therefore, investments should be made in this regard (Chu, Gu and Wang 2021; Ng 2020; Wang et al. 2020; Xiao, 2018; Zhang et al. 2017). Informational and educational interventions are instruments through which policymakers can disseminate knowledge and information among the population to foster behavior change related to waste sorting (Chu, Gu and Wang 2021; Kirakozian, 2016; Wang and Zhang 2020). As Stern (2020) argues, these interventions are non-coercive and tend to be perceived as less intrusive than economic (dis)incentives. A study by Cudjoe, Han and Yuan (2020) showed that although people can be aware of the benefits of recycling, the perceived obstacles are also essential to consider. These were especially evident in the need for educational programs to lessen the barriers to increased recycling and sorting.

The provision of information increases awareness by increasing knowledge among the population and is an instrument of fostering a culture built around recycling and sorting (Knickmeyer 2020; Pegels et al. 2022). Also, information interventions help activate the norms, which have been shown to predict waste sorting and recycling behavior strongly (Van der Werff et al. 2019). As such, there are two modules for spreading the information: educational (educating individuals on how and why they should sort waste) and persuasive (promotion and communication). Studies show that waste sorting outcomes increase by increasing citizens' informedness (Wang et al. 2020; Wang et al. 2020b). Sewak et al. (2020) review identifies that the most common informational strategies were public relations (events), print media, mass media, and social media.

The insights on the effectiveness of these programs are, at best, equivocal, although generally, they show a positive correlation with recycling and sorting behaviors (Brandt and Miafodzyeva 2013). Some recent studies (Ng, 2020; Tian et al. 2022) show that implementing a waste management policy promotes higher waste sorting outcomes via users' enhanced knowledge. While some studies find a positive association between informational and educational interventions and waste-sorting outcomes (e.g., Page and Sharp 2012), some authors directly question the effectiveness of such interventions. For instance, in her meta-analysis, Bernstad (2014) found that informational interventions resulted in a mediocre increase in waste sorting. In their meta-analysis, Osbaldiston and Schott (2012) show that convenience and financial fees are the most effective interventions to boost recycling and sorting, whereas informational and educational interventions do not have such a significant effect. Liobikiene and Matiiuk (2021) find that informational interventions insignificantly determined the level of waste sorting results. Henceforth, from the initial literature review, the findings regarding how informational and

educational interventions impact waste sorting remain equivocal. Consequently, the literature must include arguments on why these interventions fail or are not reaching their goal.

Waste sorting and recycling are crucial social challenges in which decision-makers are prone to use social marketing (Sewak et al. 2020). Social marketing surpasses the traditional notion of marketing used in a commercial setting (Issock Issock, Mpinganjira and Roberts- Lombard, 2021) and is a unique form of marketing used to design instruments aimed at changing or maintaining people's behavior to improve their well-being and society as a whole (Andreasen 1994). Governments use social marketing instruments to create systemic change (Wymer 2011). Hence, the social marketing approach would aim to institutionalize behavioral change (Kennedy 2015) and, in this special case, foster responsible waste management behavior. Institutions must take a proactive stance toward resolving critical societal challenges that have an overarching impact on the world (Shultz et al. 2022). For these reasons, we analyze these interventions' effectiveness by focusing on the waste prevention program in the Republic of Croatia through the lens of institutional theory.

Theoretical Framework
Institutions are formal and informal rules that organize social, political, and economic relations (Hodgson 2006; North 1990). Institutions provide norms, rules, and schemes that shape and guide social behavior (North 1990). According to North (1990), institutions can be formal and informal. Formal institutions are codified and thus comprise constitutions, contracts, and forms of government. On the other hand, informal institutions include customs, values, religious beliefs, and other norms of behavior that have endured through time. According to Scott's (1995) definition, institutions can be regulatory, normative, and cognitive. The regulatory pillar includes rules, laws, and structures that constrain behavior and are similar to the North's notion of formal institutions.

Institutions tend to become persistent since they reassure constituents of the" rules of the game" and simplify their conduct in society. However, the stability of institutions only sometimes creates benefits and comes at a cost if institutions are static and underlying rules, structures, and norms fail to follow the actual changes in institutions and the broader society (Thelen 2009). As a concept that addresses this anomaly, institutional rigidity represents the achievement of a relatively stable institutional setting without the ability to adapt to changing societal needs, which questions its value-added to the economy and society (Ross 1920). The concept has been bred in the tradition of new institutionalism (DiMaggio 1998), which has been a standard lens for studying the impact of institutions on economic processes. Consequently, institutional rigidity interchanges with the term "institutional ossification" (Hodgson 1989). Institutional rigidity was often viewed through evolutionary theory (Lustick 2011). By building on these ideas, rigid institutions would be trapped at a "local maximum" and thus suboptimal, serving the needs of elites rather than the changing needs of society (Lustick et al. 2011).

Given that studies strongly advocate that waste prevention policies and frameworks are often expert-driven and lack the user-centric approach (Sewak et al. 2021), it hints at the possibility that formalized institutions that govern these processes are inert and rigid, thus preventing more significant steps forward in waste sorting. However, no studies in extant literature adopt institutional theory to investigate how underlying institutional design influences the effectiveness

of waste sorting interventions. Consequently, we focus on the institutional framework that defines waste sorting as codified as a formal directive at the level of the EU acquis. EU is a supranational institution that governs and provides its member states with rules, procedures, and norms. Eventually, the directives are translated into national laws and regulations. We thus analyze the policy framework for waste sorting at the EU level to get a fine-grained view of its formal institutional background.

Overview Of Studies
Overall, we used three study designs to shed more light on the effectiveness of educational and informational interventions. Study 1 examines the impact of educational and informational interventions on waste sorting outcomes in a quasi-experimental design. The treatment group comprised 100 information and educational intervention projects in Croatian cities and municipalities that started the implementation stage during the 2018-2019 period. We design a control group by using the propensity score matching technique. We used secondary data on intervention programs and annual municipal waste and sorting statistics to measure the waste sorting outcomes between the two groups. In Study 2, we use the same dataset to gain a deeper look into the waste separation programs by applying cross-sectional analysis on the sample of 100 programs to understand how selected interventions impact the waste sorting results. In the end, the third study adopted a qualitative approach, and through interviews with project managers in charge of implementing these intervention programs, we uncovered more details on the effectiveness of interventions and the overall funding program framework.

Method
Research context
The overall strategy of the EU recognizes the sustainable management of resources as one of the primary goals. Thus, the central aspect of EU policy is the transition from the existing linear to the circular economy model. In this model, waste management occupies a vital role by dealing with necessary infrastructure to lower the efforts necessary to take part in sorting from the consumer side (availability of containers for separate waste collection). Public waste management is generally organized and governed directly by constituents (city/municipality), or they delegate it to be private or public companies.

EU's waste management framework directive introduces measurable and attainable goals tied to different timeframes (2020, 2025, 2030, 2035) related to an increase in sorting, recycling, and re-use of various materials (Eur-LEX ONLINE, 2008). The Directive is set at the EU level, and Member States establish waste management plans, environmental policies, economic incentives, and waste prevention programs that should be implemented to fulfill the designated goals set by the EU framework. Waste prevention, a focal activity in the circular economy, envisions programs to rethink product design, production, distribution, and consumption stages to create more sustainable ecosystems. Among these, the measures that affect the consumption and usage phase envision the importance of infusing information and knowledge to the general public about the importance and necessity of waste prevention schemes (Eur-LEX ONLINE, 2008).

In our study, we focus on the context of waste prevention in the Republic of Croatia, an EU member state, since 2013. Between 2018 and 2019, the Ministry of Economy and Sustainable Development (MESD) published a public call for grants, "Implementation of the educational

and informational programs for sustainable waste management ."The total available grants from the EU's Cohesion Fund for allocation under this call was 6.260 000,00 €. Eligible applicants for this call were local self-government units of the Republic of Croatia (cities or municipalities) that aim to apply educational and informational activities of sustainable waste management in an area with more than 10,000 inhabitants. The public call also envisioned individual or collective applications from cities and municipalities.

The funding call envisioned two types of interventions: mandatory and recommended. The interventions are defined and presented in *the Programme of educational and informational activities for sustainable waste management* published by MESD. Mandatory interventions included: leaflets, brochures, posters, specialized radio and tv broadcast shows, and the establishment of websites, forums, and roundtables open to the public. On the other hand, recommended interventions included: activities aimed at preschool and school children (workshops, game shows, picture books, and educational material), marking the celebration of environmental events, radio and tv commercials, Internet banners, paid ads in various electronic media, awards and contests and leaflets for tourists. The applicants were asked to choose a specific number of mandatory and recommended activities based on their size. For example, cities and municipalities with a population between 10.000 and 40.000 inhabitants had to choose at least three mandatory and two recommended activities.

Methodological strategy
We applied a mixed methods approach to gain a more comprehensive overview of the effectiveness of informational and educational interventions for waste sorting (Tashakkori and Teddlie 2003). The mixed methods approach combines qualitative and quantitative research strategies to gain more detailed insights into the problem under investigation within a single study setting (Johnson and Onwuegbuzie 2004). Compared to single-use approaches, the mixed methods perspective is pragmatic and utilizes both interpretivism and positivist approaches to research (Morgan 2007). As such, it enables higher data accuracy and allows for data triangulation. Consequently, researchers can gain a deeper understanding of the phenomena under investigation, thus increasing the validity of inference and making it more relevant for practitioners (Creswell and Plano Clark 2007). As Molina-Azorín and López-Gamero (2016) noted, the mixed methods approach is especially suitable to address complex real-world phenomena such as sustainability. We follow a procedure where we conduct quantitative analysis and then proceed with qualitative analysis to gain a more profound meaning of the results.

Data and measures
While the survey methods have been dominantly used to capture the essence of the reasoning behind waste sorting behavior, they are often criticized for lacking objectivity. In their study, Gamberini et al. (2014) show potential social desirability effects when comparing implicit and explicit data collection on waste sorting. The importance of using measurable behavioral outcomes on waste prevention and reporting these measures have been raised by previous studies (Kim, Rundle-Thiele and Knox 2019; Rundle-Thiele et al. 2019a). Nonetheless, quantitative methodologies based on secondary data represent a valuable toolbox to inform policymakers in all stages of designing effective policies and frameworks (Pauwels and Perry 2022). For these

reasons, we have decided to utilize secondary data on actual waste sorting behavior. The MESD offers complete waste sorting statistics at the level of cities and municipalities.

Data on the interventions were collected through the search engine of the Waste prevention portal (http://sprjecavanjeotpada.azo.hr/index.htm), which enables easy navigation through funded projects from this call. We have filtered and analyzed 100 projects funded from 2018-2019. We have decided to focus on this period because of two reasons. First, most projects have been initiated during this period, while only a tiny portion of them have been funded during 2016 but only in the form of individual activities rather than projects. Second, it allows us to match the project characteristics with waste sorting outcomes in an extended period (2018-2021). By doing so, we respond to concerns raised by scholars that long-term perspective should be embraced if the actual impact of pro-environmental interventions is to be manifested (Allcot and Roger 2012). Critical statistics regarding the 100 funded projects can be found in Table 1.

Table 1. Statistics regarding the funding projects

Indicator	
Average funded amount	678.129,00 HRK
The average duration of the project	17 months
Applicants (city/municipality)	Cities = 69, Municipalities = 31
The average number of mandatory activities	7,02
The average number of recommended activities	7,88
Single applicants or consortia	Single = 41, Consortia = 59

Data on waste sorting statistics have been drawn from a public database of the MESD's Directorate for environmental and natural protection (source: https://www.haop.hr/hr/tematska-podrucja/otpad-registri-oneciscavanja-i-ostali-sektorski-pritisci/gospodarenje-otpadom). The statistical data is published yearly (with a one-year time lag) and provides a quantity of municipal waste produced as well as exact percentages on sorted waste for each city and municipality in Republic of Croatia.

Analyses and Findings
Study 1 – Evaluating the Impact Of Interventions
Up till now, only a few studies tapped into a quasi-experimental approach to reveal the actual contribution that waste sorting policies have on actual sorting outcomes (Ling and Xu, 2021; Tian et al. 2022; Van der Werff et al. 2019). Among them, propensity score matching (PSM) was used the least (Wang and Zhang 2020). The role of PSM is to determine the efficacy of applied treatment and helps in removing selection and endogeneity biases. PSM is an extensively used method to estimate causal effects by matching treatment with control cases based on a set of covariates (Rosenbaum and Rubin 2022). Using PSM, researchers want to compare the outcomes between a treatment and control group by ensuring that both groups have similar characteristics on the observables. In our case, by using PSM, we can evaluate the effect of informational and educational interventions by considering the cities and municipalities that received funding as the treated group and those that have not as the control group.

Findings

In our dataset, 289 cities and municipalities conducted interventions, while the remaining 267 cities and municipalities did not. Due to the limited pool for sourcing control group subjects, we decided to focus only on cities and municipalities that were project leaders, so eventually, there were 100 cities and municipalities that were project leaders, and the rest 189 of them were consortia members. After the 1:1 allocation, 100 cities and municipalities were put into treatment and control groups.

We used PSM Python-based extension for SPSS. PSM entails two critical stages. In the first stage, the extension calculates propensity scores for each observation unit. Preselected covariates were: the size of the city/municipality (proxied through the amount of municipal waste in the base year), the status of waste sorting in the city/municipality (proxied through a percentage of waste sorting in the base year), and the region of the city/municipality (0 – non-tourist region, 1-tourist region). In the second stage, the PSM model compares the outcome (waste sorting increase) of cities/municipalities with similar (matched) propensity scores across the treated and control group.

The extension generates propensity scores through a logistic regression model by balancing the set of covariates and using a caliper width set to 0.07. Results of the PSM procedure indicate that 85 cases were fuzzy-matched to the control group counterpart, whereas 15 cases did not have matches. The unmatched cases were the largest cities for which it is tough to secure a proper match, so we excluded them from the PSM analysis. The baseline characteristics of cities and municipalities along key covariates (size, the status of waste sorting, and regional affiliation before and after applying the PSM procedure are presented in Table 2.

Table 2. Baseline characteristics for cities and municipalities before and after PSM application

	Before PSM				After PSM			
	Treatment (N = 100)	**Control (N = 267)**	**t-test**	**p-value**	**Treatment (N = 85)**	**Control (N = 85)**	**t-test**	**p-value**
Amount of municipal waste (base year = 2018)	6832,96	1332,98	- 3.88	0.000	5018,75	2341,53	- 1.04	0.298

Status of waste sorting (base year = 2018)	12,83%	5,83%	- 6.62	0.000	12,09%	10,78%	- 0.77	0.437
Regional affiliation	0.25	0.27	- 0.29	0.766	0,42	0,38	- 0.94	0.346

After applying the PSM, the differences between the treatment and control group along covariates became insignificant, suggesting that the procedure yielded satisfactory matching quality. To test the differences in main outcome variables (short and long-term increase in waste proportion), we used the student t-test for independent samples (see Table 3). We again compare the results before and after the PSM procedure to neutralize the self-selection bias.

Table 3. The impact of interventions on waste sorting outcomes before and after PSM application

	Before PSM				After PSM			
	Treatment (N = 100)	**Control (N = 267)**	**t-test**	**p-value**	**Treatment (N = 85)**	**Control (N = 85)**	**t-test**	**p-value**
Short-term change in waste sorting increase (2019-2018)	2,76%	1,06%	- 3.14	0.002**	2,83%	1,05%	- 2.14	0.033*
Long-term change in waste sorting increase (2021-2018)	8,83%	6,11%	- 2.54	0.011*	8,81%	5,89%	- 1.88	0.061

*Notes: ** p < 0.01, * p < 0.05*

The findings in Table 3 indicate that before applying PSM, the treatment group exhibited much better performance in both short- and long-term waste sorting increase. However, the findings after applying the PSM procedure indicate that informational and educational interventions only impact short-term waste sorting increase outcomes while the impact on long-term outcomes is only marginally significant.

Discussion
The application of PSM in analyzing the effectiveness of implemented informational and educational interventions shows that their impact on waste sorting outcomes diminishes in the longer term. These findings echo previous works in waste management that found these interventions' impact insignificant or mediocre at best and that impact lasts only for a limited period. However, to dive deep into potential reasons why these campaigns were not reaching their full potential, we embark on study 2 to investigate the impact specific interventions might have on waste sorting outcomes.

Study 2 – How Specific Types of Interventions Impact Waste Sorting Outcomes.
We conducted a cross-sectional analysis using ordinary least squares regression (OLS) to reveal the most effective interventions. Since the project envisioned two groups of interventions (mandatory and recommended), we decided to analyze their impact on changes in waste sorting percentages (short- and long-term). Additionally, we controlled for the following factors: the percentage of people with higher education degrees living in the city/municipality, the amount of budget spent on environmental management (county-level data), the level of economic development (GDP pc, county-level), the number of funds spent in the project and the project duration. In Table 4, we present the results regarding our OLS model.

Table 4. The impact of interventions on waste sorting outcomes in long-term

DV = Waste sorting (long-term)		
Predictors	**Model 1**	**Model 2**
Controls		
% people with an HE degree	-.06	-.01
Environmental budget	.01	-.00
GDP pc	-.02	-.09
Project funds	.17	.18
Project duration	.23*	.25*
Main effects		
Mandatory interventions		-.37**
Recommended interventions		.30*
R^2	.07	.17
ΔR^2	.07	.09**
F-value	1.45	2.53
ΔF	1.45	4.89**

Notes: ** p < 0.01, * p < 0.05

Findings show that mandatory and recommended interventions have significant but countervailing effects on the change in waste sorting percentage (long-term).[8] We provide partial plots in Figure 1. Regarding control variables, only project duration significantly affects waste sorting in the long term.

Figure 1. Influence of interventions on waste sorting outcomes (partial regression plots)
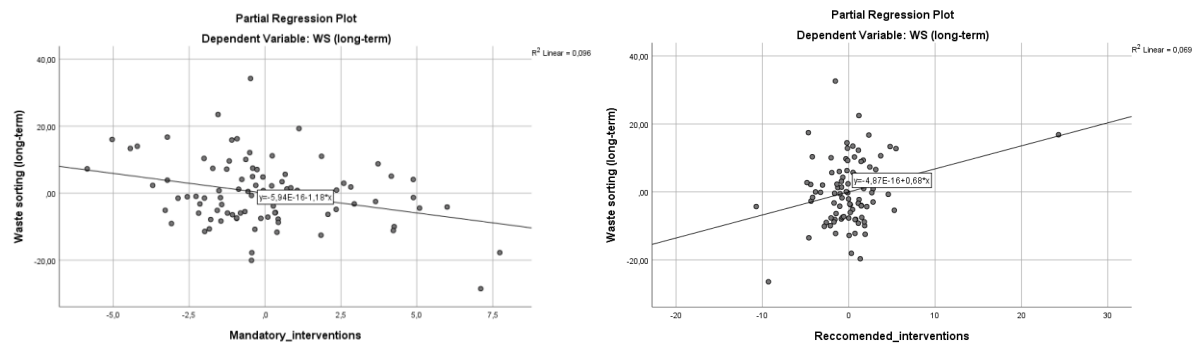
Additional Analyses
First, we operationalized interventions in alternative ways to check whether alternative models yield better explanations for waste sorting outcomes. First, we divided all interventions into main groups: mass media advertising (printed, tv and radio), digital advertising, events and publicity, and educational interventions aimed at preschool and school children. The waste management literature presents fine-grained operationalization of educational and informational interventions similarly (Bernstad 2014; Deng et al. 2022; Knickmeyer 2020; Xiao et al. 2018; Wang et al. 2020). However, we found no statistically significant results regarding short- and long-term waste sorting percentages.

Discussion
According to findings from OLS regression analysis, the findings show the countervailing impact of mandatory vs. recommended educational and informational interventions on waste sorting outcomes. Mandatory interventions lower long-term waste sorting, but the recommended interventions have increased the long-term percentage of sorted waste. We conducted post-hoc interviews with project managers implementing these interventions to illuminate further why this occurred.

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[8] The effect on short-term changes is not statistically significant, so these are not shown in Table 4.

Study 3 – Reflection of Cities/Municipalities On The Project Framework And Implemented Interventions

We conducted a follow-up interview to dive deep into the potential reasons why mandatory and recommended activities showed countervailing influence on waste sorting. A total of 10 project managers in charge of funded projects were recruited via e-mail invitation. In table 5, we showcase the profile of the informants, which exhibit high diversity and enable us to reach theoretical representativeness.

Table 5. Profile of the informants

Respondent #	City/municipality Area	Size (Amount of municipal waste)	Status of waste sorting (%) in 2018 (%)	Mandatory/ Recommended activities	Increase/decrease in waste sorting (%) in 2021 (compared to base year - 2018)
A	Coastal	4022	10,5	10/0	18,4
B	Continental	2037	13,7	7/3	28,7
C	Island	1066	0	5/5	1,0
D	Coastal	10852	17,0	7/11	41,0
E	Continental	9507	35,8	5/9	55,4
F	Continental	16351	9,6	7/10	14,5
G	Coastal	6580	3,6	5/8	11,5
H	Continental	1865	8,3	11/1	5,7
I	Continental	3431	16,4	7/11	43,9
J	Island	6038	0	6/5	44,3

The respondents were asked to assess the effectiveness of mandatory and recommended educational and informational activities they implemented in their cities and municipalities in an open-end question fashion. We followed a thematic analysis and analyzed the data inductively by seeking themes from the interview data (Braun and Clarke, 2006). Since we only focused on one question, the data collection and analysis were simplified and focused. The interviews were recorded and then transcribed to be later used for the analysis.

Findings

The participants agreed that recommended activities yielded much better effects in the field since they can be effectively and creatively designed to adjust to local needs and thus reach target goals. Recommended activities allowed participants to choose from the palette of interventions that would best fit their context and align with their area's current waste-sorting culture. Another beneficial aspect of recommended activities is that they are more diverse and could complement the current activities in the city/municipality.

"I assume this is because the recommended activities leave the possibility of adjusting or selecting exactly those activities that can better impact the specific environment in which they are carried out, i.e., the end users in that environment. The program's users can best recognize this, i.e., people who live and work in that (local) environment." (Respondent A)

"Our experience confirms that only the recommended interventions were meaningful and effective, especially those aimed towards preschool and school children. They left room for creativity and were fun for the children, so I guess the ideas stuck with them." (Respondent B)

"I think we did not have a good foundation for implementing this project, so we would not have succeeded in raising awareness and waste separation. That is why I think there is a big difference in the results precisely because each city and municipality is not the same in terms of development, people's habits, educational system, level of waste sorting, etc. That is why recommended interventions could generate a better impact. We could choose needed and currently lacking activities, or in which we have deficiencies, or else we know that the population would recognize that activity as useful." (Respondent H)

"From our perspective, I can say that the recommended interventions were most effective. Here I would outline the activities that targeted the younger population (kindergartens and schools), considering that they managed to get a little animated and interested in the culture of waste sorting and recycling." (Respondent D)

On the other hand, the utility of mandatory activities was highly questioned since they left very little room for creativity, and in some ways, they were yielding counterproductive results. Noteworthy was also that respondents questioned the return on investment in certain mandatory activities, which was easily achieved by some alternative recommended activities.

"Mandatory activities that included the "promotional materials" (flyers, guides, brochures) were money waste and contributed to creating additional waste (I hope they at least threw them in the paper bin). I firmly believe that if applicants could freely choose their interventions, most would certainly not choose to make leaflets and guides or make TV shows." (Respondent B)

"Now, considering that we are an island municipality, we, therefore, have a specific population, and I believe each municipality tries to choose interventions according to the knowledge of the psychology of its community. The project's requirement is 100% coverage of the population according to the census. This is always a problem because it is not realistic data; many islanders only have a part-time residence (summerhouse) and live in cities or outside the Republic of Croatia. To achieve 100% coverage, I was forced to print a flyer and send it by mail to every address, which had no effect because the islanders do not like orders and to be told what to do. Also, even though I worked exclusively on recycled paper and environmentally friendly colors, again, printing generated waste. Second, radio or TV content for the islanders makes no sense because it is an older population and is too expensive, so there would be no funds left for other activities. Of all the activities, I believe that public meetings and events were the best way to

achieve that our target population gets answers to everything they are interested in and that you explain to them how your project will work." (Respondent C)

"A big plus for the recommended activities is that some of them are very effective, such as radio advertising, because they are more frequent and more straightforward than radio broadcast shows (paradoxically, ads are recommended, and the broadcast shows are mandatory, that is, for example, wrong) and per today's times, banners and articles on Internet portals are also a better option. Communication through them is far more effective than with many other interventions. Let us take the brochures, for example, we sent one to each household, and the question is who in the household found it in the mailbox and whether they read it and gave it to other household members to read. On the other hand, most people surf the Internet individually and will come across banners and articles by themselves, even without the assistance of others. The same applies to campaigns on social networks, which are easily spread. In summary, brochures and television broadcast shows on prominent channels are undoubtedly excellent but costly. Similarly, postal services when sending brochures are also costly, while a few thousand HRK does wonders on Facebook." (Respondent I)

"So, the printed materials (leaflets, brochures, and posters) are unnecessary and outdated and do not reach the target groups even though they may physically reach them. They thought we were to reach at least the older population that does not use the Internet - but the population on the island again does not pay much attention to such materials. That is why the recommended activities were more useful because we could be more creative following local needs, and that local moment is the most important - it is okay to have TV shows in big cities, but not on islands. Alternatively, posters in the sense of billboards, we do not have space to place them on the island." (Respondent J)

In addition, the respondents showed significant reservations about how the project call was envisioned. This was manifested in restricted budgeting rules, which severely hampered the ability of cities and municipalities to implement mandatory activities in sufficient capacity and scope. The respondents argued that project controlling and rigidity was a source of many burdens that exploited their resources, time, and effort. This was especially evident in trying to justify the effectiveness of some mandatory interventions.

"I had a tiny budget for organizing the public meetings and events, and we are talking about 11 settlements on the island, so I have a problem at the start because, in nature, I would need to go to each settlement personally, and I do not have the funds for that. With the fact that in some settlements you have only around 20 inhabitants. That is why I made only three public events in three settlements, two in the south of the island in larger settlements and one in the north where the number of inhabitants is smaller." (Respondent C)

"From our standpoint, the mandatory interventions were seen as less effective. For instance, printing paper leaflets and brochures was a waste of money since much of it remained in the stock because, realistically, what are you going to do with it - the citizens are not interested in it, and it is a must, and that is where the biggest financial corrections took place. Not because of the users themselves, but because of questionable controllers obliged to authorize every output document due to mandatory visibility elements." (Respondent E)

"In my opinion, the posters and flyers were superfluous because the public was constantly informed about the activities through the media and social networks, and in the end, there were many posters and flyers left unallocated."(Respondent G)

Discussion

Respondents have evaluated the recommended activities to be more effective than mandatory ones. One of the main reasons is that recommended activities left much room for creative responses that might provide citizens a better educational and informational boost. Here, the main benefit was seen in the ability of respondents to contextualize interventions to reach a greater audience and increase waste sorting. On the other hand, the mandatory activities were mostly seen as not being able to justify the underlying investment, unlike the recommended activities. In the end, the respondents had significant reservations about the project framework since it needed to be more flexible and left a small space for customizing the set of interventions that would best fit the user's needs.

General Discussion

By drawing on institutional theory, this study aimed to uncover the effectiveness of educational and informational interventions in driving increased waste sorting outcomes. Through employing a mixed-methods approach, we were able to show that the increase in waste sorting due to these interventions is mediocre at best. A possible explanation might be that some interventions were fixed (mandatory) while some offered cities and municipalities more freedom to choose the most effective means of increasing waste sorting (recommended). Fixed and strict terms upon which the funding call was envisioned represented a significant burden for users that steered the waste prevention strategy appropriation and, indirectly, the waste sorting outcomes. Compared to the rest of the literature, ours is the first study to inspect upstream institutional arrangments in waste prevention policy by connecting the waste sorting framework and the actual performance of interventions. Below we discuss the contributions of our study in light of the extant literature.

First, our study's main reasoning is countervailing evidence on whether educational and informational interventions effectively achieve waste prevention goals (Chu, Gu and Wang 2021). Studies so far have been thoroughly conducted from the end user's perspective, where theories such as TPB have been utilized (Cudjoe, Han and Yuan 2020; Zhang et al. 2019). However, our study's findings indicate that the waste prevention policy's effectiveness is highly contingent on how users in charge of its implementation assess the appropriateness of specific educational and informational interventions in addressing waste challenges in their specific city and municipality. Our studies indicate that the contribution of these interventions is limited, contrary to what previous studies showed (Tian et al. 2022; Van der Werff et al. 2019). Although the recorded impact was positive, our PSM model shows that the long-term increase attributed to the impact of these interventions is marginally significant. Our study findings thus align with insights from Minelgaitė and Liobikienė (2019), who find that educational and informational interventions work only for a smaller number of communities. Second, our findings align with previous studies' insights that long-term effects can diminish without a sound economic incentives system that would increase waste sorting (Osbaldiston and Schott 2012). Consequently, our results align with the prior discussion that educational and informational interventions should be complemented with other interventions, such as the ones focusing on

convenience and economic incentives (Bernstad 2014; Czajkowski, Kadziela and Hanley 2014; Li et al. 2020).

Second, findings from our cross-sectional analysis prove that mandatory interventions drive a decrease, whereas recommended interventions drive an increase in waste sorting. On top of this, post-hoc interviews with project managers showed that recommended activities left more space for customizing the set of interventions that would work best in a specific area. The respondents indicated that interventions aimed at (pre)school children were mainly practical. These insights tie well with previous findings that argue that proper segmentation and targeting are essential predecessors for successfully customizing the interventions (Varotto and Spagnolli 2017). The studies so far show that different segments (based on demographics) might be reacting differently to information and educative content (Li et al. 2020) and could nurture divergent waste-sorting attitudes (De Feo and DeGisi 2010) and norms (Setiawan, Afiff and Heruwasto 2021). The qualitative evidence shows that remote (islands) and coastal areas vastly differ from the context of large urban and continental areas. Here we tie well to prior waste management and social marketing literature that mandates the user-centric orientation and inclusion of stakeholders in formulating these interventions to achieve success (Hurley et al. 2019; Jesson 2009; Kim et al. 2020a; Sewak et al. 2020).

Third, unlike previous studies that exclusively focus on the nature of interventions, we analyze the policy effectiveness vertically, i.e., how users in charge of implementing these interventions see the effectiveness of guiding institutional framework manifested through funding calls. According to the findings obtained through interviews, the "one size fits all" approach (envisioned by the framework) is not the best way to tackle the idiosyncratic needs of program users. Thus, we show a considerable discrepancy between expert and user perspectives on how the practical framework should be designed and implemented (Kim et al. 2020b). While the project framework ties specific types of interventions with the idiosyncratic needs of target groups (Pearson and Perera 2018), the rigidity and inflexibility of the project funding framework (the predetermined rule for selecting the number and type of interventions in each category), has impaired waste sorting potential. The fund dissemination mechanism showcased in this paper confirms that public contracts that underlie such mechanisms are rigid and burden users more (Spiller 2009). This was also manifested in cases where some mandatory activities were seen as really effective means of reaching the target population, but the inflexibility in budget plans and reporting to higher instances could have improved their performance. On the whole, our study corroborates earlier concerns that the effectiveness of policies addressing grand social challenges necessitates simultaneous influence on both upstream (influencing legislation and policy frameworks) and downstream (influence on behavioral change of citizens) (Kennedy 2015), espousing a more comprehensive stakeholder approach (Mesiranta et al. 2022). Hence, the case analyzed in our study confirms the existence of institutional rigidity and ossification in the upstream part of waste management system, making the institutional arrangements suboptimal compared to societal needs and performance (Lustick et al. 2011).

Conclusion
Theoretical and Policy Implications
The SDG topics underlie waste sorting and recycling (responsible production and consumption and fighting climate change) remain a top priority for academicians and practitioners (Scott,

Hassler and Martin 2022). Municipal waste leads to the exploitation of resources and represents a major problem to sustainable development, especially in developing nations. The significant negative impact comes from the production, consumption, and post-consumption phases (ref-EU). To lessen these negative impacts, governments introduced various policy interventions. They are transforming everyday human activities into environmentally-friendly ones that necessitate creative approaches from policymakers (Taylor and Todd 1995). As a form of sustainable behaviors, sorting and recycling need support by providing educational and informational interventions, which can help increase the awareness and knowledge capacity of the citizens and the general public (Green et al. 2019). We envisioned our study as a response to gaps by answering two overarching questions: 1) how effective are educational and informational interventions, and 2) in which ways can they be improved?

Our study contributes to the literature investigating the intersection between public policy and marketing. Our approach focuses on specific educational and informational activities as intervention packages supported through the EU funding scheme. Through a mixed-methods approach, we find that users' perception of policy rigidity (blanket approach) contributed to the suboptimal performance of the implemented interventions. As the evidence from three studies shows, the informational and educational interventions show varying and heterogeneous effects. For some cities and municipalities, the designed program interventions worked well, but for the majority, there were severe obstacles because there needed to be a closer fit between what users wanted to implement and what the actual options were. While intrinsically, these interventions might be beneficial in some cases, making them a mandatory requirement for every context suggests that the lack of user involvement and co-design perspective in preemptive stages is a critical limitation (Kim et al. 2020a). Consequently, our study bridges perspectives from both social marketing (Dietrich et al. 2016; Kim et al. 2020a; Kim et al. 2020b; Trischler et al. 2019) and mainstream environmental management pieces of literature in addressing the suboptimality in current waste management policies and interventions (Lange et al. 2014; Shen and Wan 2013; Shen, Yu, and Wan 2014). By focusing on the upstream part of waste management policy, we could detect institutional rigidity as one explanation for why educational and informational interventions might fail to reach their goal, although their nature and design might follow the "best practice" principle. We fill the gap in extant public policy and marketing literature, which shows opposition and resistance to implementing incentive policies in social programs (Bolderdijk et al. 2017). Our study aligns with this view and informs that responses to information- and education-based interventions might go in the same direction if they are not made relevant for the target audience and coordinated with other stakeholders (Mesiranta et al. 2022).

The results of our study provide valuable insight to policymakers in charge of designing waste prevention policies and responding to intervention packages. Inherently, interventions should be co-designed with actual users to meet the target population's needs. Focusing on the user's perspective should therefore exceed the mere understanding of what the target group requires and envision participatory modes of conduct where users co-design interventions that aim to foster behavioral change in their area of living (Kim, Knox, and Rundle-Thiele 201; Kubacki et al. 2015; Sewak et al. 2020). Ours is the first study that indirectly addresses the potential problems that might arise in the upstream channel of waste prevention programs, i.e., the policies and frameworks that guide overall waste prevention approaches in the field. From the practical

standpoint, our findings inevitably pinpoint that the main problem is not in the interventions but in a framework that orchestrates which ones should be implemented. By revealing this anomaly, our study adds to the literature discussing suboptimal public resource allocations due to institutional rigidities (Lustick et al. 2011). In other words, the lack of co-design principles and providing a "one size fits all" approach in guiding the choice of educational and informational intervention and implementation makes some of these interventions a waste of effort, time, and resources.

Limitations and Suggestions for Future Research
Besides offering novel insights, our study also bears some limitations that must be acknowledged. First, we focus on a single case study from the Croatian context, and the results should be interpreted with contextual caution. Moreover, our PSM analyses can be seen as a limitation since the original pool to extract control group subjects needed to be narrower compared to populations used in other areas. For example, business studies can rely on a larger population of firms to find matched samples and medicine studies when creating a control group of patients.

Second, we focused only on educational and informational interventions and how they impact waste sorting awareness which is a necessary precursor for behavioral change in the long term. The limitation of our study pertains to not investigating other essential variables that designate behavioral change. This would require using the primary data from users to analyze the abilities and motivations that are basic premises of behavioral change models (e.g., Fogg's model of behavioral change).

Third, we only scratched the surface and did not investigate the potential differences that might emerge from comparing specific educational and informational interventions. Our study investigates the boundary conditions surrounding the upstream policy design and framework, thus detecting ineffectiveness due to poor design. However, we refrain from stating that these could be the only drawback in waste sorting policy. For instance, previous studies show that variance in waste sorting and recycling behavior could be attributed to appeals used in communication material (Mukhopadhyay, Patrick, and Wang 2017). Moreover, Miafodzyeva and Brandt (2013) indicate that these different educational and informational interventions can influence either concrete or abstract knowledge generation among users. On top of this, very little is known about the background of these informational and educational interventions. For instance, regarding what type of persuasion strategy they used, one might argue that the difference in waste sorting outcomes might be explained by whether the city or municipality endorsed pure persuasion or social comparison (Dupré and Meineri 2016). Therefore, future studies are encouraged to dive deep into potential differences in the structure and impact of specific educational and informational interventions.

Fourth, the literature acknowledges that more holistic programs should be implemented (Kim, Rundle-Thiele and Knox 2019). In such cases, the educational and informational interventions would work in concert with other interventions (i.e., convenience and economic incentives). Many studies corroborate that complementarity between interventions might bring more significant benefits in waste prevention (Aadland et al. 2005; Kirakozian 2016). The infrastructure per se does not increase the recycling rates solely (Haghighatjoo, Noroozi , and

Tahmasebi 2020; Wan et al. 2014) but in combination with other interventions. Consequently, future studies are encouraged to investigate the potential complementarities between different interventions.

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Sustainable Marketing of Metals: A Case Study of Steel

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Sustainability has been recognized as a megatrend by competing schools of thought in macromarketing (Mittelstaedt et al. 2014). While marketing contributes to societal welfare through customer satisfaction, its effects also include environmental degradation, thereby negatively impacting long-run societal welfare (Kadirov 2011). Degradation of the natural environment arising out of marketing transactions imposes economic costs on the society and such negative externalities must be addressed to sustain social welfare (Varadarajan 2020).

To support sustainable business practices, marketing must re-orient itself and promote sustainable marketing practices (Parvatiyar and Sheth 2021). In recent years, climate change has emerged as an existential threat that needs an urgent response from consumers, businesses and governments. C-suite executives consider it to be a "top three" issue impacting their strategies and operations and are responding by increasing their sustainability investments (Deloitte 2023). Holm and Little (2022) declared that "climate change represents both an opportunity and a threat to marketing and marketing practice" and called macromarketers to take up the challenge to champion sustainable marketing in their practice and research.

Recognizing the crucial role of co2 emissions in climate change, this article examines steel industry, one of the largest contributors of co2 gas worldwide. In the rest of the paper, sources of co2 in the steel industry are analyzed and following the framework proposed by Sheth and Parvatiyar (2021), solutions are identified in the form of corporate actions and government actions. The mechanisms, actions and structure (MAS) theory proposed by Layton (2015) provides a conceptual framework to understand the roles of the participants, their actions and the formation of new groups and networks in the emerging sustainable steel marketing system.

Greenhouse gas emissions were estimated to have reached 57.8 gigatons (co2 equivalent) in 2022, the highest level ever, in human history (World Emissions Clock 2023). To meet climate goals, significant changes are needed in the industrial sector. Steel industry contributes about 7% of the co2 emissions due to its reliance on coal in the production process according to the Climate TRACE report (Ben M'barek et al 2022) and 28% of industrial emissions. Steel industry is also highly concentrated, with China accounting for over 50 per cent of global production and the other advanced economies like EU, U.S., India, Japan and South Korea accounting for over a quarter of world production.

Given the lack of reliable statistics on co2 production in various sectors, Climate TRACE, a non-profit organization started tracking emissions using a sophisticated methodology (Zhong 2022). Climate TRACE has compiled data on the emissions of 800 steel plants around the world that can be analyzed at the individual plant or country level. They make a distinction between two ways steel is produced. The traditional manufacturing of steel includes a blast furnace (BF) and basic oxygenation furnace (BOF) whereas the alternative route involves the electric arc furnace (EAF). Data show that co2 emissions per ton of steel are consistently lower in the EAF method. Further, variations are observed across countries in terms of co2 production. This leads to the

conclusion that co2 emissions can be reduced by adoption of more effective technologies by countries at the high end of co2 emissions and the shifting of steel production from the BF/BOF method to the EAF route where possible.

Table 1: Top 20 Steel Producing Countries and Co2 Emissions

Country	Total assets	Satellite-monitored Assets (Production Units)	Total asset production (Mt)	Satellite-monitored production (Mt)	Total asset emissions (MtCO₂)	Satellite-monitored emissions (MtCO₂)	Total asset capacity (Mt)	Satellite-monitored capacity (Mt)	Satellite Monitored Emissions per Ton of Steel	Emissions per Ton of Steel
China	332	198 (60%)	818.3	672	1225.1	1042	1170.5	911.0 (78%)	1.5506	1.4971
Japan	39	15 (38%)	87.7	65.5	131.3	122.7	119.1	88.2 (74%)	1.87328	1.4971
United States	72	9 (12%)	85.8	22.9	49.9	34.4	116.2	36.7 (32%)	1.50218	0.5815
India	45	17 (38%)	71.2	43.8	144.2	95.8	123.8	89.8 (72%)	2.18721	2.0252
Russia	26	8 (31%)	66.1	49.1	72	66.1	84.4	62.4 (74%)	1.34623	1.0892
South Korea	15	3 (20%)	64.1	50.1	85.6	82.6	84.5	57 (67%)	1.6487	1.3354
Turkey	25	3 (12%)	40.4	10.5	21.3	16.2	53.7	13.3 (25%)	1.54286	0.5272
Germany	18	8 (44%)	35.4	28.4	42.9	41.4	48.1	36.3 (75%)	1.45775	1.2118
Brazil	22	7 (32%)	32.8	21.5	43.1	35.5	47.1	31.1 (66%)	1.65116	1.3140
Iran	18	2 (11%)	28.5	3.2	10.3	4.2	38.5	6.3 (16%)	1.3125	0.3614
Italy	23	1 (4%)	22.6	4.1	11.3	7	34.2	11.5 (34%)	1.70732	0.5
Mexico	14	2 (14%)	18.5	7	12.5	6.7	25.7	12 (47%)	0.95714	0.6756
Vietnam	14	2 (14%)	18.5	9.3	26.2	18.4	24.9	13.1 (53%)	1.97849	1.4162
Ukraine	11	7 (64%)	17.1	13	32.7	26.6	42.3	34.4 (81%)	2.04615	1.9122

Taiwan	5	2 (40%)	15.5	5	21.8	6.8	19	7.1 (37%)	1.36	1.4064
Spain	14	1 (7%)	14.2	0.9	7.6	1.3	19.1	1.2 (6%)	1.44444	0.5352
Indonesia	6	2 (33%)	13.7	6.5	17.7	10.6	13.7	6.5 (47%)	1.63077	1.2919
France	10	2 (20%)	13.1	9	17	16	19.8	11.9 (60%)	1.77778	1.2977
Canada	8	3 (38%)	11.1	6.3	10.5	8.3	15.5	9.8 (63%)	1.31746	0.9459
Egypt	7	1 (14%)	10.3	0.3	2.9	0.5	14.9	2.1 (14%)	1.66667	0.2815

Source: Climate TRACE. Last two columns are calculated by the author.

Implementation of the marketing actions suggested by Sheth and Parvatiyar (2021) will help the cause of sustainable development. Sheth and Parvatiyar (2021) proposed sustainable marketing for sustainable development, involving corporate actions as well as government actions. Corporate actions include redesign of products & services, promotion of responsible consumption, repurposed marketing-mix and reorganized marketing function. Regulatory policies, reform measures, promotional programs and participative partnerships are proposed as appropriate government actions.

Layton (2015) integrated insights from social sciences and macromarketing into the MAS theory to explain the formation and growth of marketing systems. The forces driving the production and marketing of sustainable steel and the emergence of new actors and networks can be seen more clearly through the lens of MAS theory. Structure and functions of marketing systems are the product of social mechanisms including cooperation, specialization and emergence as well as co-evolution of beliefs and behaviors of participants. Further, actions involving incumbents, challengers and governance units lead to the formation of emergence of institutional entrepreneurs, networks and regulatory agencies. Various changes being made in the steel industry or being proposed at this time point to the emergence of a new system at the macro level.

On the corporate side, redesigning products for sustainability is a feasible option. Researchers at the University of Birmingham, U.K. recently announced that use of 'perovskite' would not only reduce co2 emissions by 88% in the BF/BOF production of steel by recycling co2, it would also reduce costs and recoup the investments in two years (Khan 2023). Promoting 'reconsumption' of steel by recycling it to produce new steel through the EAF method would lead to significant reductions in co2 emissions.

New actors in the form of Swiss Church Aid that sued Holcim, a Swiss Cement maker on behalf of Indonesian islanders (Ballard 2023B) and Friends of the Earth, an environmental non-profit group that won a court case involving reduction of carbon emissions in a Dutch court (McFarlane 2021) are emerging as players in the sustainability system. Intermediaries such as Science Based Targets initiative (SBTi) are developing new methods such as Sectoral

Decarbonization Approach (SDA) for a network of large steel companies across continents (Science Based Targets 2022).

Governmental actions would similarly contribute to the lowering of co2 emissions in the steel industry. This is especially relevant since significant parts of the steel industry are state-owned in countries such as China and India. Regulatory policies such as setting emissions standards, when coordinated across countries, can yield results. If the countries with high levels of emissions such as China and India can bring the levels down to the levels observed in NAFTA countries, significant reductions would occur. The injection of $120 million by AncellorMittal into Bostonmetal, a firm co-founded by MIT researchers (Davey 2023) is an example of participative partnership strategy.

The need for curtailing the co2 emissions in the steel industry, one of the largest contributors to the global greenhouse gases, is clearly recognized by corporations and governments. Considering that the U.N. process that relies on consensus among member countries is too slow to produce action, countries such as China, India, U.S., and Japan, the largest steel-producing economies should take responsibility for implementing swift action to decarbonize steel production. Further, advanced countries should commit to purchasing steel produced with the lowest levels of carbon emissions, at higher prices if necessary, to prod the industry toward decarbonization (Ballard 2023A). Following the suggestion of Deloitte and RMI (2023), a system-aligned approach with coordinated policies and programs across supply chains is recommended to speed up the decarbonization of steel production.

Future macromarketing research must evaluate the results of current decarbonization efforts to identify the most effective strategies. Industry-focused studies covering sectors such as cement and chemicals should be conducted to assess and identify effective decarbonization strategies across major industries contributing to global warming.

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Anti-Consumption for Macromarketers: A Systematic Literature Review and Research Agenda of Consumer, Brands and Sustainability

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This study provides a systematic literature review of anti-consumption, highlighting sustainability, consumer attitudes towards consumption and brand relationships as the three main themes in the anti-consumption literature. The paper displays the available theories and methods of the literature to date and shows a comparative analysis of citation records, uncovering the extant thematic that emerge as sustainability and relationship marketing. The authors explored micro, meso, and macro approaches to marketing systems, identifying the themes and focus of each level of analysis. Analyzing how avoiding or subverting consumption creates individual, shared or structural opportunities, anti-consumption is studied in multiple orientations (Balderjahn et al. 2018; Chatzidakis and Lee 2013; Iyer and Muncy 2009; Makri et al. 2020). Initially related to attitudinal study common on psychology (Zavestoski 2002), anti-consumption has since been subjected to an impressive and extensive theoretical research (Arnould 2007; Cherrier 2009; Varman and Belk 2009).

The ability to understand and act on consumer behavior has since opened opportunities to develop and analyze further stages of the consumption chain, and the attention to other stakeholders, including producers, policymakers, managers, researchers, and the public. Social issues care for holistic approaches to understand complex systems of change in macromarketing, with social sustainability and warnings relating to human impact on the environment like climate change (He, Pan, and Deng 2018; Lewandowska et al. 2018; Liu et al. 2020). Environmental oriented and sustainable anti-consumption literature reveal many basis of macro level approaches that this research highlights and validates by analyzing the main themes, keywords and citation links that show sustainability, alongside consumer-brand relationships research, as key topics of interest when approaching anti-consumption (Albinsson and Yasanthi Perera 2012; Black and Cherrier 2010; García-de-Frutos, Ortega-Egea, and Martínez-del-Río 2018; Perera, Hewege, and Mai 2020; Sekhon and Armstrong Soule 2020).

Considering the macro implications of anti-consumption explained above, extant research is increasingly interested in uncovering applications such as sustainability, ecology, and waste reduction (Black and Cherrier 2010; Chatzidakis, Maclaran, and Bradshaw 2012; García-de-Frutos, Ortega-Egea, and Martínez-del-Río 2018; Seegebarth et al. 2016). Concepts from different orientations on green preference and reduction of waste already uncover macromarketing relevance and integrative opportunities from macro level perspective that relies on the understanding and awareness of micro and meso studies (Albinsson and Yasanthi Perera 2012; Black and Cherrier 2010; García-de-Frutos, Ortega-Egea, and Martínez-del-Río 2018; Ozanne and Ballantine 2010; Perera, Hewege, and Mai 2020; Sekhon and Armstrong Soule 2020).

Within the anti-consumption literature, the importance of sustainability in a macro perspective is highlighted through the analysis conducted in this study. The employed methods uncover the

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contribution and future paths for macromarketing to investigate the underlying goals that motivate behavioral and branding studies, exploring marketing roles and interactions on anti-consumption phenomena. A systematic literature review provided a categorization of what themes compose the literature, and in which and how different levels of analysis are present. A cluster analysis of the citation links and keywords used in the literature of anti-consumption provides an overview of these interactions.

Methodology and Results
This systematic literature review on anti-consumption literature follows the PRISMA model for selecting the included literature (Moher et al. 2009). Conducting a search on the databases Web of Science (WoS) and Scopus, collected 250 articles from the first, adding 45 unique items with the late search. Editorials were removed (12), totaling 283 articles until 2021. The themes of analysis that were categorized and found to be relevant are presented in Table 1.

Table 1: Conceptual orientation of the studies from WoS and Scopus.

Conceptual Orientation	Nr.	Comment
Consumer	93	Explores consumer behavior towards consumption, including the impact on consumer wellbeing, and environmental and social influences on consumer decision.
Sustainability	47	Examines sustainable consumption and production activities from both the consumer and company perspective, including green marketing strategies and corporate social responsibility initiatives.
Consumer-Brand Relationships (C.B.R.)	38	Investigate the relationship between consumers and brands, exploring the impact of brand identity and marketing on consumer behavior and decision-making.
Alternative Market	25	Explores alternative markets, such as sharing economy, creative sharing, car-sharing, land-sharing, dumpster diving, and different alternatives to traditional practices.
Healthcare	22	Examine the relationship between consumer behaviors, marketing, and health outcomes, and the initiatives to change consumption or production practices.
Simplicity	20	Explores the voluntary simplicity movement and other similar approaches that focus on consuming less and examines their potential benefits including environmental and individual wellbeing.

Policy	16	Examines the role of policies and regulations in shaping consumer behavior and consumption and production practices.
Boycott	14	Explores the use of boycotts as a tool consumer action to demand change, usually with social, environmental or sustainable implications.
Country of Origin (C.O.O.)	8	Explores how countries of origin can imply a detrimental use of some products examining consumer attitudes towards anti-consumption.
Editorial	12	Articles pertaining to editorials.

These themes constitute an overview that are present on micro meso and macro levels of anti-consumption. Uncovering the relationship between methods and thematic orientations in the literature provide future research and extant knowledge about how different empirical testing in micro studies can be relevant for future macro considerations on policy and environmental sustainability. Simultaneously, macromarketing can provide an understanding on how gaps in micro research can be developed with further applications. The level of analysis was further described and exemplified in Table 2.

Table 2: Level of Analysis and Examples of Studies

Conceptual Orientation	Level Occurrence in Literature	Description of Relevant Articles
Consumer	Most of these articles pertain to the Micro level, with some applying Meso and Micro analysis. There are on a smaller scale some Macro analysis.	This topic has a lot of Micro analysis where the individual actions and experiences, as the consumer behavior, is explored (Amine and Gicquel 2011; Helm, Moulard, and Richins 2015; Nixon 2020). Regarding meso analysis there is some articles regarding Individual response to advertising (Muralidharan 2016) , relationship with brands (Bettany and Kerrane 2011) while Kuanr et al. (2021) explores the impact of culture and group on anti-consumption based on sustainability. Some examples of macro in this section contextualizes consumer culture and major implications (Coulter and Strizhakova 2019) and the analysis of consumer discourse towards the structures (Díaz, Merino, and Valor 2017).
Sustainability	Sustainability has most of it's papers on Macro Level, following by some that combine Macro and Micro and some that are Micro.	This category has many examples of macro level of analysis, including historical, political and social implications of anti-consumption (Witkowski 2020) developing subculture categorizations (Hewege, Mai, and Perera 2020) and implications of macro implications that affect individual (Chatzidakis and Shaw 2018). There are also examples of meso Chatzidakis et al. (2012)

|		and micro focused research in this topic like Philp and Nepomuceno (2020).
Consumer-Brand Relationships (C.B.R.)	The vast majority of these articles pertain to Meso and Micro analysis.	The majority are of meso orientation, where the analysis is the consumer behavior in his relation with brands, brand controlled environments, products or services (Atwal and Bryson 2018; Chou, Liao, and Lin 2015)
Alternative Market	This category, despite focusing mainly on Micro, Meso and a combination of both, also presents some articles of Macro or in combination with Meso and Micro.	For example there are studies in macro and micro, like Ozanne and Ozanne (2016) who analyses a method of alternative market that solves global social issues, while also explores ethnographic analysis of micro experiences. For micro Bardhi and Eckhardt (2012) analyses consumers and and their relation with brands. Examples of meso are especially on research on collaborative markets, like P2P and land share, where those communities are analyzed (McArthur 2015; Philip, Ozanne, and Ballantine 2015)
Healthcare	These category has a balanced distribution of Micro, Macro and Meso levels of analysis.	This theme contains articles with macro approaches to vaccination (Chaney and Lee 2022; Demirbag Kaplan and Cem Kaplan 2011) drinking (Fry 2010, 2011; Hackley et al. 2015; Piacentini and Banister 2009) but also includes meso levels of analysis on the relationship with the marketing system or organization (Armstrong Soule and Sekhon 2019; Nayal, Pandey, and Paul 2021). Micro approaches are mainly focused in the consumer behavior according to food and nutrition like (Allen, Goddard, and Farmer 2018; Muhammad et al. 2020).
Simplicity	The vast majority of these are on Micro, following by those who combine Meso and Micro, and then Macro.	The orientation towards simplicity comes with many studies of micro approaches, including the individual assessment of psychological factors (Nepomuceno and Laroche 2015) and consumer attitudes (Lee 2019). Some studies include some meso dimensions, like the relationship with the management of social activities (Chugani, Peifer, and Roos 2020) and the relationship with the markets (Shaw and Moraes 2009).
Policy	These category has a balanced distribution of Macro and Meso levels of analysis, with few items on Micro.	Policy has examples of studies on meso about advertising (Walter 2013) and relationship with brands (Cova and D'Antone 2016). Most are related to macro approaches like policy impact and effects on society (Ahamad, Omar, and Zen 2013) discourse analysis (Gao 2018) subcultures

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		exploration (Anderson, Hamilton, and Tonner 2018) and other macro analysis of anti-consumption implications.
Boycott	This category focus mainly on Meso, Micro and a combination of both.	This theme focus on the consumer behavior and intention to boycott brands, and studies like Yuksel et al. (2020). Others pertain more to a meso level of analysis on the interaction with the organizations and brands (Hutter and Hoffmann 2013; Sandıkcı and Ekici 2009).
Country of Origin (C.O.O.)	Most of this articles are on Meso and Maco levels of analysis.	Country of origin has both macro studies that interpret many dimensions of social and economic activity like Varman and Belk (2009) and subcultures that implement anti-consumption practices as Sandlin and Milam (2008). Some are meso oriented with specific C.O.O. cases (Pérez-Mesa, Sánchez-Fernández, Serrano-Arcos 2018) with focus on specific brands and countries (Ashraf, Khan and Malik 2019) and other like Antonia Russell et al. (2011) focusing on specific industries like cinema.
Editorial	N/A	

To highlight the major connections of anti-consumption themes, citations, and keywords in scientific publications on the Web of Science database were analyzed using VOSViewer. It provides a visualization of relationships by citations that links publications, while determines clusters publications by defining the targeted size (van Eck and Waltman 2010). This method creates a visual representation of the three main clusters, presented in figure 1, where blue represents negative consumer-brand relationship, green sustainability, and red the anti-consumption theory and consumer core literature. To retrieve the three main clusters in the literature, it was determined to use the document citation links of all the documents with 10 citations or more. This used a total of 157 articles that had citation links between them. To achieve the 3 major clusters, the minimum number of cluster size was set to 30, that were then analyzed.

The first cluster identified in the anti-consumption literature , is 'anti-consumption and consumer behavior', marked in red, where theoretical and general approach to the consumer behavior is the highlight. This cluster has some publications that are near, or sometimes, overlapping sustainability themes, but has a whole they are theory defining of anti-consumption behaviors in individuals (Zavestoski 2002) or cultural identities (Cherrier 2009). This first broad cluster overlaps and is near the second cluster, 'Environmental and Sustainable Anti-consumption', which is represented in green. It includes studies based on market and economic systems that can contribute to anti-consumption (Bardhi and Eckhardt 2012), cultural identities and activities that have an underlying sustainable goals and ethical implications (Bradshaw, Chatzidakis, and Maclaran 2012). Last, the wellbeing and welfare of lifestyle and consumer choices with

sustainable implications (Seegebarth et al. 2016). The third cluster called 'Consumer Brand-Relationships' is the smallest and is represented in blue, with and emphasized distance from the others. It focuses on marketing and negative branding interactions, like brand hate and negative-brand relationships (Atwal, Bryson, and Hultén 2013; Delzen, Fetscherin, and Hegner 2017).

Figure 1: The 3 Main Clusters in Anti-Consumption Literature
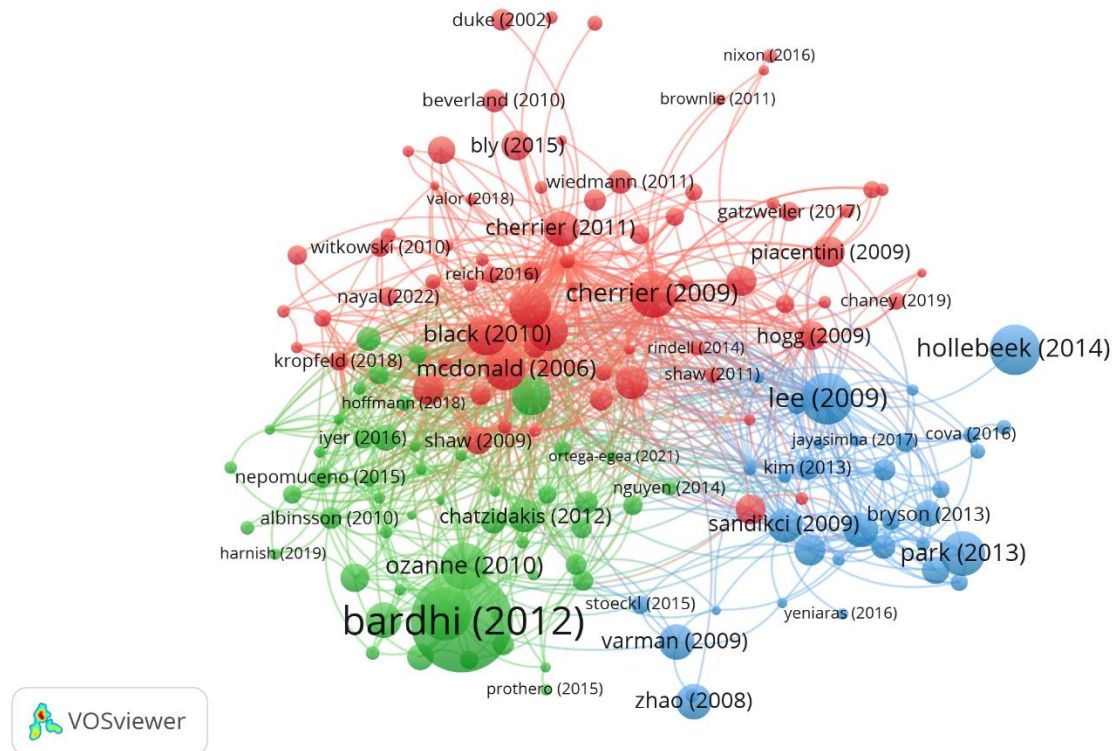
Author keywords most linked by citations offered an additional perspective over these defined clusters. By choosing keywords with a frequency of at least 3, in different publications, the clusters were created with a resolution of 1.0 and a minimum cluster size of 10. The results clearly reveal similar patterns to those that were analyzed in citation links. Also identified is the link between the Anti-Consumption and Consumer Behavior in red, with Consumer-Brand Relationship keywords in blue, with the same overlapping from previous analysis. Environmental and Sustainable Anti-consumption remains in the green cluster of keywords in figure 2.

Figure 2. The 3 Main Clusters in Keywords Used by Anti-Consumption Literature
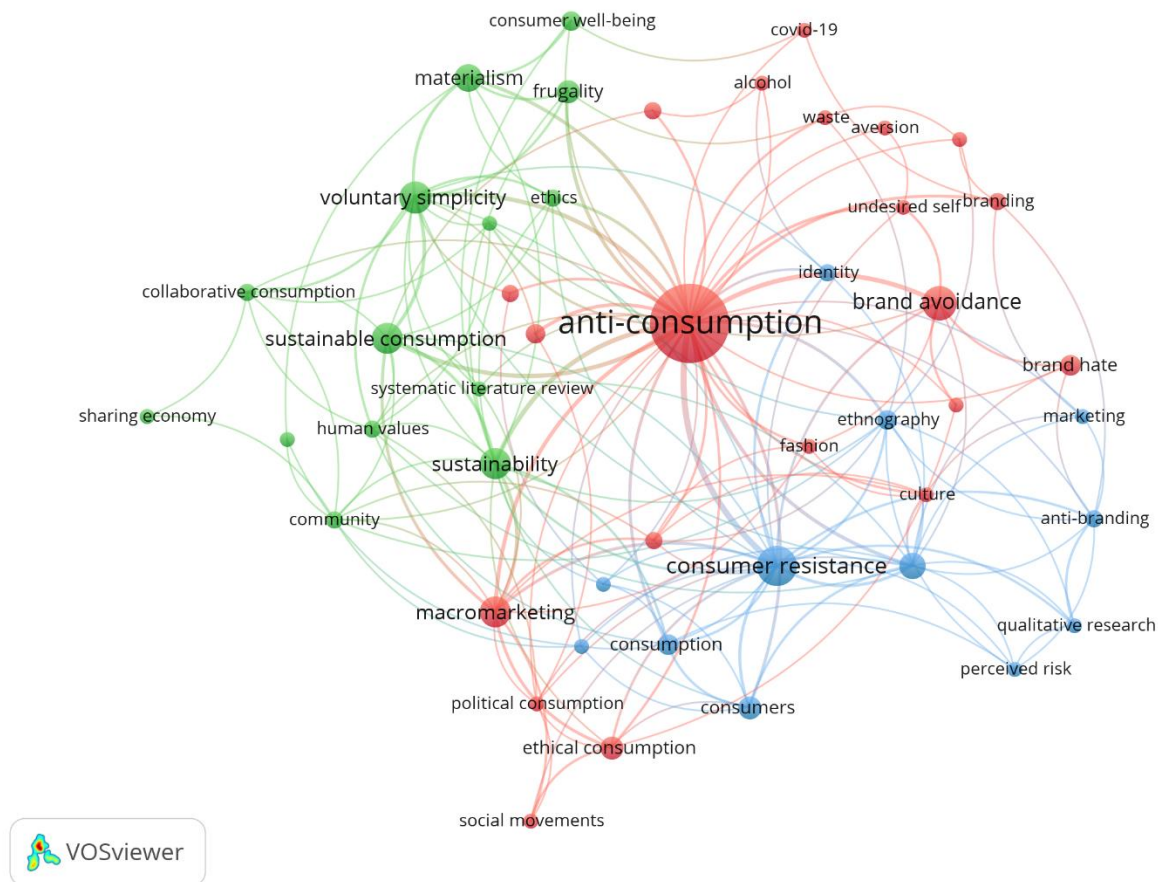
Conclusion

The potential of anti-consumption is vast and can be applied across different levels of application and its integrative models (Iyer and Muncy 2009). With successful implementations in macro approaches, the opportunities that anti-consumption research can create are twofold. One, for the role of anti-consumption in sustainable and positive outcomes, positioning marketing as a macro tool that aims research and policy to improve society; and two, as an integrative opportunity to inform further research that overtakes multiple levels of research.

Macro avenues that highlighted from the Environmental and Sustainable Anti-consumption cluster show how anti-consumption can improve sustainability through innovations on circular economy (Bardhi and Eckhardt 2012), alternative markets, and sharing (Ozanne and Ballantine 2010; Philip, Ozanne, and Ballantine 2015). It also relate to public policies interact with

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consumption and production by contributing to sustainability, for example, by regulating product life spans (Scott and Weaver 2018). Another avenues are on the implications from social and economic contribution to anti-consumption with sustainability and environmental purposes and goals, manifested in society in different cultural phenomena and groups (Moraes, Szmigin, and Carrigan 2010; Perera, Auger, and Klein 2018) generating a purpose of wellbeing and welfare in the search for sustainability (Hüttel, Balderjahn, and Hoffmann 2020; Seegebarth et al. 2016). Finally, longitudinal studies can bring interesting avenues of research to further investigate how anti-consumption is impacting sustainability, and also how specific applications are impacting industries and business (Sharp, Høj, and Wheeler 2010).

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FIFA's Greenest Football Club: Delivering and Disseminating Social Innovations at Forest Green Rovers

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Forest Green Rovers (FGR) has emerged in the English Football League as a champion of social innovation. It has been hailed as 'The World's Greenest Football Club' by FIFA, and the club has disrupted how a football club can be managed and radically changed the game-day experience. This paper examines how a suite of social innovations at FGR has been introduced, embedded, shared, and adopted by others. The study follows a multi-phase qualitative approach and demonstrates FGR's successful implementation of a wide range of social innovations that have proved crucial in imbuing social actors to make positive social changes. The paper concludes by proffering an extended conceptual framework of the critical elements that enable the successful implementation of social innovations in a professional sporting context.

Introduction

Embedded in the heart of social discourse and with its origins linked to community, industry, and urban revolution (Hardy et al. 2012; Shrives and Slack 2008), football is considered the "undisputed, pre-eminent team sport in the world" (Schyns et al. 2016). It is the 'king' of sports (Araujo, de Carlos, and Fraiz 2014), with half the world's population actively supporting the game (Nielson Sports 2018). Football is both entertainment and big business (Blumrodt et al. 2013; Clowes and Tapp 2002).

Football is never far from scrutiny and critique (Brunzell and Söderman 2012), with Lee (1998, p.32) suggesting that the English game 'displays all the symptoms of inequality, short-termism and greed'. However, the football literature indicates that the sport is shedding its atavistic, profit-centric approach and acknowledging the necessity of engagement with multiple external actors (Megheirkouni et al. 2018). A significant area of change for football has been its immersion into socially responsible and sustainable practices (Kolyperas et al. 2015). Consequently, the following study aims to investigate Social Innovation as a driver for Social Change in the context of professional football. However, such changes demand new organisational actors (Anagnostopoulos & Shilbury 2013), such as Forest Green Rovers Football Club. Following unprecedented access and three years of research at FGR, this paper is the first to empirically explore the application of social innovations in professional football. In doing so, it seeks to address the following research question 'How can social innovations be introduced and embedded within a professional sporting institution'?

Introducing a New Actor

Forest Green Rovers (FGR) has been an integral part of the small town of Nailsworth since 1889. In 2017, it was promoted to League Division Two, but the wave of media attention that followed had little to do with its footballing success. Instead, the media was attracted to the club's chairman - entrepreneur, Dale Vince and the sustainable practices he has championed since

taking over the club in 2010. Headlines and reports included 'Forest Green Rovers- the club where meat is off the menu, and the pitch is fed seaweed' (The Times, 2017). More recently, the 'Vegan Football Club Unveils Its Sustainable Uniform Made from Bamboo' (Plantbasednews 2019).

From the organic seaweed-fed pitch, the solar panel-charged floodlights, recycled water systems, energy-saving heating systems, and charging points for electric cars to the more novel practices of players' kit being made from bamboo, championing family and feminist values, and all staff (including the professional football players) and visitors (fans and dignitaries) only being served vegan food, FGR demonstrates a radical shift from the traditional football club (FGR Sustainability, 2017).

In recognition of these achievements, in July 2018, The United Nations officially certified FGR as 'the world's first carbon-neutral football club' and recruited Dale Vince as a UN Climate Change ambassador (The Guardian 2018). In addition, the club became the world's first accredited vegan football club (Vegan Society 2015), and FIFA, the sport's governing body, labelled it as the 'world's greenest football club' (BBC 2018).

The FT (2019) suggest that FGR's sustainability initiatives are a 'big winner', and in 2018 the club reached a turnover of £4,921,685, which is approximately 19% higher than other clubs playing at the same level (FGR Footprint Report 2019). FGR continue to advance their sustainability credentials, and in 2018 reported a 16% reduction in carbon emissions, a 44% reduction in individual spectator's carbon footprint, a 40% reduction in energy use and a 57% reduction in water consumption (IBID). Furthermore, the club is now building the world's first all-wooden 5,000-capacity Eco Park stadium that is set to be 'the greenest football stadium in the world.' (The Guardian B 2018).

FGR is singular among clubs in a traditionally masculine sporting environment. Globally recognised as a champion of sustainability and social innovation, it represents a unique landscape to study how SIs may be employed in the world's most popular professional sport and embedded within a professional sporting institution.

Literature Review
Social Innovation and Sustainability
Social innovation is about developing new ideas that successfully meet social objectives. It consists of "innovative activities and services motivated by the goal of meeting a social need" (Mulgan, 2007, p. 8). SI is increasingly seen as a tool for addressing environmental, economic and social challenges, such as restructuring markets towards sustainability and reimagining cities, transport systems and housing to reduce carbon emissions (Phillips et al. 2015; Repo and Matschoss 2019).

Social Innovation
Social and environmental issues have become increasingly salient to sport (Kolyperas et al., 2015). Team sports, such as football, are particularly influential in this shift as they are more likely to influence social behaviours (Breitbarth et al. 2015). Football's desire to distance itself from unethical behaviours has grown. It is now overwhelming (Jessel and Mendelewitsch 2007).

However, it remains unclear whether this transition is simple compliance or a genuine epiphany predicated upon values that are shared with society (Freeman et al., 2004).

Social Innovations (SI) that reduce the deleterious impacts of business (Phillips et al., 2019; Carvalho et al. 2018; Yao et al. 2019) should result in what Rennings (2000) refers to as the 'two positive externalities' of reducing negative impact and creating positive knowledge that might be beneficial to others. Windrum et al. (2016) note that a broad spectrum of organisation stakeholders can be engaged in SI, and when these are aligned, they can better seek and address societal challenges. Rogers (2003) suggests that the most efficient way to disseminate innovation of any kind is to adopt or create an environment that is 'homophilous'. That is, where stakeholders share a common connection as 'innovations are in constant tension between the innovation itself and the surrounding systems necessary for or to facilitate adoption' (Hitz and Katsanis 2014).

A few attempts have been made to develop conceptual frameworks to further academic studies of SI. For example, Saji and Ellingstad's (2016) model captures the different social actors and their communication levels when engaged in SI projects. Aksoy et al. (2019) developed a framework for SI in service offerings, while Ziegler (2017) captured the collaborative processes in SI. Cajaiba-Santana's (2014) research proffers a novel and comprehensive conceptual framework to investigate SI as a driver for social change (Figure 1).

Operationalising this framework in the context of professional football, the 'footballing institutions' that are of immediate influence are FGR, as the landscape in which SIs are implemented, and FIFA, which has recognised the club's endeavours. Other 'non-footballing institutions' that are also influential comprise the wider society within which FGR and football operate and the United Nations that recognised Dale Vince's personal commitment to sustainability (Guardian 2018). The 'intra-group' is conceptualised as the practices of the staff and supporters of FGR. The 'inter-group' represent football stakeholders, such as visiting fans and other clubs, and the 'extra-group' represent stakeholders not immediately concerned with the footballing aspects of FGR, such as the residents of Nailsworth and Forest Green.

Figure 1. A Schematic Conceptual Model of the Social Innovation Process in Cajaiba-Santana, G. (2014). Social Innovation: Moving the field forward. A conceptual framework. Technology Forecasting & Social Change, 82, p.48.
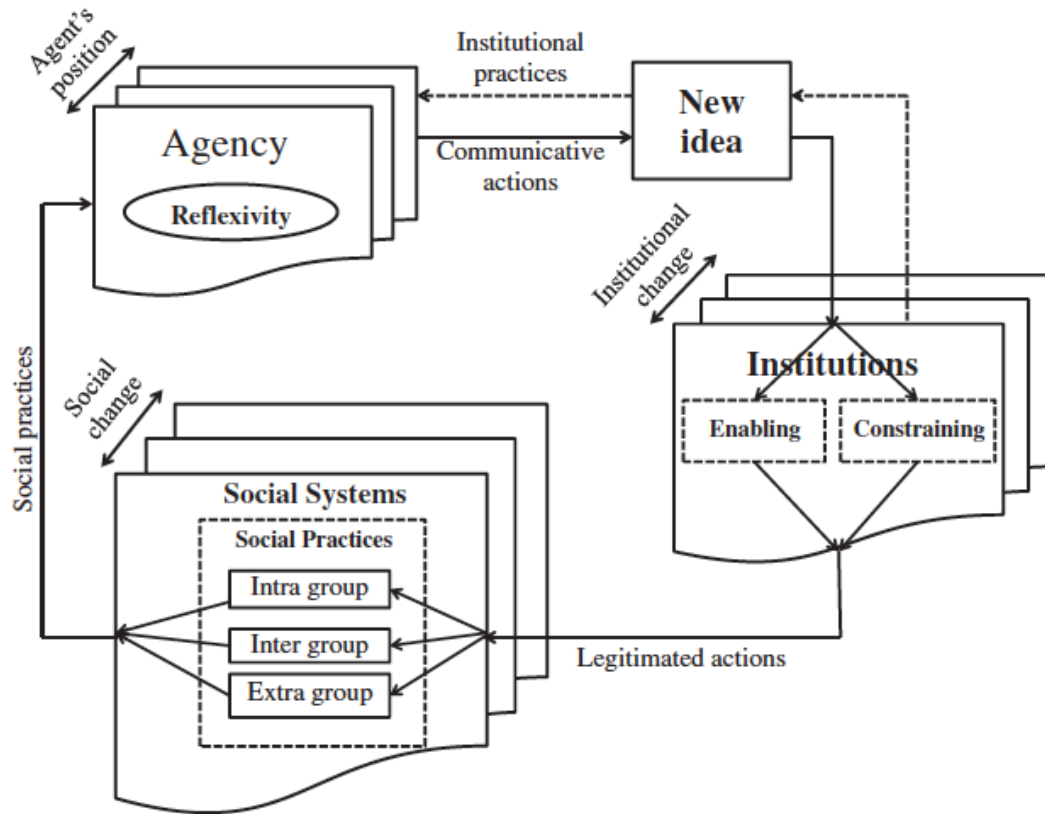
Methodology

This study adopted a multi-phase approach comprising an extended period of case study research comprising participant observation, triangulated with three focus groups and a series of 61 semi-structured interviews, see Table 1: Data Sets Collected and Analysed. This design constituted what Benkwitz and Molnar (2012) refer to as the 'self-immersion' approach that also enabled the triangulation and confirmation of findings (Cain, Chamberlain, Dupuis, and Sheridan 2011). All fieldwork and data analysis were conducted by (withheld for reviewing purposes) following ethical approval from (withheld for reviewing purposes) and ratification by FGR's board of directors.

Table 1: Data Sets Collected and Analysed

Data sets	Data
Matches attended as an FGR supporter 27 Matches attended over three seasons in Division 2 of The English Football League.	Field Notes of 27,852 words of data, plus 64 photographs.
Invitations to FGR Run Events: 9 in total	
Interviews with FGR Management & Workforce: 25 in total, all conducted at the New Lawn FGR	
Interviews with FGR Supporters: 23 in total, all conducted at The New Lawn FGR	32.5 hours of interviews in total were captured, resulting in transcripts of 76,889 words.
Interviews with FGR's Local Community 17 in total, all conducted in the Villages of Nailsworth/Forest Green	
Focus Groups with UK Football Fans: 3 in total conducted at The New Lawn FGR and The Egypt Mill Hotel, Nailsworth.	2.4 hours of recordings, approximately 7,235 transcribed words and 36 photographs.

Participant Observation

The lead researcher (Withheld for reviewing purposes) engaged in the everyday practices and events at FGR over three years. During this period, the 'life' of FGR was witnessed through deliberate and unplanned 'fortunate encounters' with the people, events and artefacts of which it is comprised. Through this, the research captured the meanings of things through the eyes of those that live them (Peattie and Samuel 2016).

Focus Groups

Focus groups were incorporated to invoke extended discussions of the participants' perceptions of FGR (Hamlin et al. 2017). Each group member was asked to photograph interesting or important aspects of FGR and its grounds, which were used to initiate group discussions (Bettany and Kerrane 2018).

Interviews

Semi-structured interviews averaging around 53-minute duration were conducted with 61 stakeholders to garner rich insight into the social innovations implemented at FGR and their resultant influence on individuals (Denscombe 2010). These were conducted at FGR around Nailsworth and The Arkell community centre in Forest Green during match day.
The interview questions were open-ended and operationalised from the literature (Charmaz 2006) to explore the social initiatives, agents and institutions identified in the research framework.

Events that were observed and attended during the PAR, the focus group discussions and the semi-structured interviews were recorded in the form of field notes (Hames and Paolisso 2010) or on Dictaphone as conditions and participant consent allowed (Duclos 2017): verbal consent was obtained and participants have been anonymised in all instances (Van den Hoonard, 2003). The field notes, and recordings were used reflexively to guide the development of further questions and emergent research themes (Davidson and Halcomb 2006).

Data Analysis

The data sets in Table 1 were thematically analysed according to Braun and Clarke's (2006) six-stage process. Four key social innovation themes emerged from this analysis; Cleaning Up, Food for Thought, Personification, and Don't Forget the Football, all unpacked in the analysis and discussion below. See Table 2 for further description.

Table 2: Six-Stage Thematic Analysis

Stage	ACTIONS
1. Familiarising yourself with the data:	Throughout Phase 1 of the fieldwork the lead researcher familiarised the other researchers with the FGR research environment and shared salient observations and excerpts from field notes. After the fieldwork was complete, all three researchers read the transcripts and photographs of the focus groups and interviews in conjunction with the lead researcher's field notes.
2. Generating initial codes:	Each researcher independently coded the data sets, broadly guided by the research framework Figure 1).
3. Searching for themes:	Each researcher grouped their initial codes into logical themes.
4. Reviewing themes:	The researchers compared and contrasted their interpretations of the dominant themes. Inter-rater reliability was calculated during this phase to assess the degree of concordance among the research team. Discussions continued until a satisfactory degree of concordance was achieved.
5. Defining and naming themes:	The researchers collectively agreed upon the naming convention for the dominant and emergent themes.
6. Producing the report:	The 'Data Analysis' section was crafted.

Analysis and Discussion

This section presents the study's findings according to the four dominant themes identified through the analyses. Within these themes are accounts of the SIs implemented, which have imbued a sense of legitimacy among the key club and social stakeholders due to their concurrent application. The section then discusses each in terms of Cajaiba-Santana's (2014) theoretical framework. It proposes extending the framework to recognise the emergent themes of 'Personification' and 'Don't Forget About the Football'.

Dominant Themes: "Cleaning Up" and "Food for Thought"

The theme 'cleaning up' is based on three distinct findings from the study. First, cleaning up considered from the perspective of the tangible sustainable and social innovations that reduce the club's environmental/ecological impact to become the world's first carbon-neutral, greenest football club (Guardian 2018):

'It's run differently with sustainability and being eco-friendly. When I think of Forest Green Rovers, that's the biggest thing I think about' (FGR Employee).

Second, the theme expresses FGR's commitment to changing the often 'toxic macho dominated' social environment 'normally experienced' when attending and engaging with the sport of professional football:

'The people all look out for you. They are not just in it for themselves' (FGR Academy Player).

Third, cleaning up is considered from the position of understanding and determining the pursuit of club sponsorship and promotion at FGR being regulated to 'fit' with the social and environmental ethos of the chairman and the club:

'We are very picky about our sponsorship, and if we can green them up a little bit more, imagine what they are going to be like in ten years' (FGR Management).

The fourth dominant theme, "Food for Thought", highlights FGR's decision to limit food consumption to exclusively Vegan. This has resulted in much chatter and controversy but has been one of the more successful SIs introduced at FGR.

Cleaning Up Your Own Backyard:
The entrance to FGR's football stadium is dominated by two novel (at a football ground) physical symbols that comprise the Ecotricity electric car charging ports in the car park and an array of solar panels. While it is uncommon to see these at football grounds, their presence in our urban landscapes is now not unusual. It is among the most accepted symbols of clean/sustainable energy production and consumption. Consequently, the solar panels were more of an inter-group indicator, or a 'reassurance', that the club endeavoured to improve its environmental performance.

The novelty of the electric car charging points was not lost on the attendees at match days and had a much more profound influence. These have had a material effect on visitors since they are frequently fully booked in advance of match days. Observations often captured people gathering nearby and partaking in informal discussions around the practicality and apprehensions of electric car ownership, specifically regarding cost and range reliability. These discussions were also captured during the focus groups, with participants expressing a desire to learn more about electric cars while also agonising over their 'newness' and the fear of limited supporting infrastructure:

'They have the power points where you plug your car in. I'm not sure everyone is ready for this change yet' (FGR Staff).

Visitors frequently remarked upon the thought that had gone into the sustainability of every aspect of the club. For instance, the mention of vegan-only menus, biodegradable containers and food packaging, and Fairtrade tea, coffee and cola was prevalent in all the data sets. Similarly, the unique 'organic and vegan' approach to managing and maintaining FGR's playing surface

emerges from the data as a constant source of pride, complex intrigue and a means to share sustainability expertise:

'Trying to have a healthier pitch… they're real trailblazers' (Local Journalist).

Recognition for this key 'complex' operational practice has moved beyond stakeholder group understanding/reaction and empathy to become a positive symbol of sustainable disruption and entrepreneurship from which extra-groups in the sporting world have been keen to learn. FGR's desire to share its sustainability knowledge and expertise has resulted in its hosting the leaders of several world-renowned sporting institutions seeking to implement or advance their playing surface. For example, Wembley, Wimbledon Tennis Club, Real Bettis Football Club, and Aston Villa have all been educated by the club's groundsman and are now in the process of changing their playing surface management systems:

'A lot of clubs talk to us about how we manage our pitch. Our groundsman, in particular, talks to a lot of other groundsmen about what he is doing" (FGR Management).

Cleaning Up the Social Experience:

In a sport recognised for its machismo and a host of unsocial behaviours, many were keen to express their observations of an entirely different experience at FGR. They described it as respectful, family-friendly, and suitable for children and parents to enjoy all the experiences involved in watching football:

'We are also very strong on our family values. We have a sense of kindness about how we approach things' (FGR Management).

The club's commitment to creating a safe environment is reflected in its 'young ambassadors' program and its capacity to bring local children's voices and activities into the club. There was a strong sense of pride and value in the programme, and recognition of the club's values and respect for children is expressed through its dedicated spaces in match day programmes and the club's official website to 'ambassador blogs' and other forms of communication:

'The positives are lots of children. We don't seem to have many of the hardcore noisy fans behind the goal' (FGR Supporter).

At the start of every season, the club gifts five hundred football kits to local children and gives children free entry to games. This, along with the strong links that have been developed with local schools through players and staff visits, sustainability education days and vegan cooking sessions, were all recognised as positive strides in developing the 'family values' and friendly environment:

'It is very family orientated' (FGR Supporter).

A substantial proportion of the data emphasises FGR's attempts to develop community links. Despite residents' complaints about traffic and parking congestion on match day, the club's commitment to the local economy and stance on social, economic and ecological sustainability. This was often communicated in the data through a sense of 'local pride' and 'doing the right

thing' as FGR pushed the boundaries of sustainability in an arena that many see as riddled with multiple layers of hostility. Thus, FGR's links with local schools and its proactive community engagement appear to have developed a social foundation of a 'friendly respectful club' where several wicked problems and grand challenges can be questioned, communicated and addressed:

'By having groups come and enjoy the community stand, they'll enjoy the food, see all the charge points, they might become intrigued, so even those little touch points have quite a big impact' (FGR Employee).
Some expressed these operational and cultural shifts as the promotion of 'feminist values' in a toxic, male-dominated industry:

'Talking to away fans, one thing they notice is that we are approachable and friendly. It's also the players; they go out to a lot of school visits' (FGR Staff).

However, despite the number of positives associated with these practices and belief systems, a word of caution was still present in the data. For example, some said these changes have led to a less vociferous atmosphere at games than at other football grounds in the same league. This has led to the club's friendly and welcoming stance being considered as possibly 'detrimental' to creating the hostility that is considered necessary to give teams a home advantage in a very competitive sport:

'Funnily enough, the manager complains…normally when you go to a football match, there's a hell of a racket going on behind the goal, and there's a lot of perhaps loose language and all that sort of thing. We're a bit too namby-pamby and too many kids there.' (FGR Supporter)

The above observation was considered a significant behavioural modification and predicated on what the ground meant symbolically regarding FGR's approach to the game. Realistically, FGR's home ground should not hold any contemporary relevance or pertinence to an away fan (beyond the fixture), and arrival in a car park at a sporting event should result in a cacophony as tensions and excitement build. However, on this occasion, the opposite was manifest and observed. This marks a considerable change in what may be regarded as the hallowed inter-group practice of singing, chanting and slogans of rival football fans.

Cleaning Up Sponsorship Affiliation:
The data reveal several significant points relating to FGR's governance and the resulting sponsorship on display. The sponsorship from products and services that are either local or related to sustainability is recognised and perceived to dominate FGR's landscape. This 'sponsorship code of conduct' is recognised by many stakeholders as an authentic demonstration of the chairman and club's commitment and holistic approach to sustainability. Sponsorship brands that are visible and available to try, for example, Quorn and Oat Ly (both available from the food stall) and Faith in Nature (hand wash in the toilets), are noticed and commented upon. There is a suggestion in the data that by 'having no real choice other than these products', some stakeholders have felt forced to try certain brands for the first time. However, they have gradually started to enjoy them and have since introduced them into their 'family and our shopping'. Thus, these brands, like vegan food, are also showcased by FGR and, as such, are tried by their stakeholders in a safe place:

'We've learnt that there's such a thing as Quorn vegan chunks. So, we have gone out and looked for them' (FGR Supporter).

Arguably, while these sponsors are identified as a positive, it could also be viewed as nothing more than a basic brand alignment strategy where both FGR and the sponsor work symbiotically to 'authentically' project both the organisation's and the brand's sustainability credentials.

Worthy of particular note is the attention given to the clean energy company Ecotricity, which is FGR's main sponsor, and the club's holding company. For some, the prevalence of Ecotricity symbols at FGR was a little distasteful and a reminder of the 'crass commercialisation of the game'.

However, following exposure to the Ecotricity brand, many visitors engaged in post-match research into the company's consumer proposition, with views to transfer from traditional mainstream energy companies to the 'greener and cleaner Ecotricity'. Many saw the adverts as a reminder that clean domestic energy is now 'easily available' and 'worth consideration if the price was right'. Some expressed their sense of pride by living a more sustainable lifestyle by switching their energy consumption to a 'local green company that is both a vital part of the region and FGR's infrastructure:

'Well, we're now signed up with Ecotricity' (FGR Supporter).

Last, there were contrasting emotions regarding the other sponsors encountered at the ground. For example, some recognised and approved the link between FGR's vision and Sea Shepherd's commitment to protecting the world's oceans:

'Sea Shepherd, they make Greenpeace look like pussycats don't they? They're pretty radical' (FGR Supporter).

Others questioned the legality of sponsoring a 'political organisation' that has 'nothing to do with the football' while some had no idea what the Sea Shepherd's symbol was (displayed on the back of FGRs shirt, flags around the ground and later the inspiration for FGRs 3rd playing kit):

'I don't know what Sea Shepherd is all about, a kind of angry Greenpeace I think' (FGR Supporter).

In summary, the novelty of seeing 'different brands and products that are 'good for the environment', along with those that are potentiality controversial, does not go unnoticed and indeed has resulted in several exciting outcomes:

- There is the unquestionably synergistic value of brand alignment in play at FGR.
- 'Testable' brands have gained the benefit of being available to try in a 'safe' place, and there is a recognition that this has tipped over into personal consumption for some.

- As the primary sponsor, Ecotricity is overwhelmingly viewed with a sense of pride and social/ecological relevance and is suggested to be a 'seamless' relationship that has tipped many into either enquiring or becoming Ecotricity customers.

Food for Thought:
FGR's unique stance to choice editing food consumption to an exclusive Vegan menu has proved to be the most talked about, controversial and possibly successful SI idea the Football club has implemented:

'The good thing with this club is that everything around the club and the stadium is vegan but it gives you the choice it's not like strict rules and boundaries' (FGR Team Captain).

How FGR has enacted policies and procedures to adopt and promote this form of food consumption was an important subject for the focus groups and the interviewees:

'There seems to be a growing awareness about veganism, but I think our awareness of that has been enhanced by the fact that we see it every week here' (FGR Supporter);
'When you told me it was vegan only food I was a bit concerned that I wouldn't like it, but I tried their veggie pie and it was fantastic. I would have no fears in the future to try this food. (Casual Visitor)

Significant recognition and novelty were attributed to the food and drink that was available, both to buy and sample (for example, a free Vegan based bag of food samples and advice was distributed at the Morecambe game on 28th October 2017) while at FGR.

The club environment provided the opportunity to sample different vegan brands, aided by removing typical food and drink options, such as cows' milk, meat-based food and big brands such as Coca-Cola and Cadbury from any food outlets. Thus, trying 'new and different things such as soya milk in my tea' shows how visiting FGR can create a new consumption experience and acts as a vehicle for consumer learning. As such, the findings point to creating a 'safe place' where people can experiment and try different types of vegan food. The vegan philosophy has been received as an affirmative act that FGR stakeholders are keen to indulge in, support and share. There is also significant evidence to suggest that it has acted as a gateway to changing attitudes to this 'type of food'; subsequently, many of FGR's stakeholders recognise their 'food consumption' interaction while at the club has operated as a tipping point into reducing meat consumption. Many are now following full or part-time vegan diets both as individuals and as a family unit in their home life:

'I'm not a converted vegan or anything, but definitely eat less meat you know and probably shop a bit more ethically as well' (Local Journalist);

'I eat a lot less meat than I use to, being at the stadium and at the training ground it has just gradually progressed coming into my home life' (FGR Team Player).

The message that a vegan diet is 'good for the environment' also appears to be gaining traction

across FGRs stakeholders. The data indicated that many now understand the link between their 'diet' and climate change:

'I'm not a vegan or agree with all this stuff, but I buy into all the stuff about the greenness, I think that's great, I think it's fantastic' (FGR Supporter).

However, despite the overwhelmingly positive influence, reactions to vegan/ethical food and drink may also be adverse. Some participants felt the club's stance on this was a 'step too far' and were resentful that it was becoming 'more important than the football'. As such, many had no intention of changing their diet and actively subverted the symbol by 'eating elsewhere': 'I don't touch it myself. I never have. I'm still a meat man. Yeah the only vegan days that we have are here' (FGR Supporter).

While vegan-only food appears to be a critical tipping point for influencing new social practices, it also plays a role in the club and some stakeholders' identity construction. Externally, FGR fans are often referred to as 'vegans' and 'tree huggers', which is a label many are willing to accept and even embrace. This moniker provided a soundbite that projects the club's uniqueness and is argued to have 'helped put our small club firmly on the map' and legitimised the SI to the broader world of visiting football clubs and their fans. It shows how this is reinforced at the ground as fans enter the stadium:

'I think often it attracts a lot of criticism and cynicism from fans in other clubs but they're talking about us. I don't mind being a bit different. We're always on the news and people turning up to try the food and stuff like that. Famous people. Vegans from all over the country come here.' (FGR Supporter)

Additionally, when hosting FGR as a visiting team, many football clubs have been known to change their food offerings on match day. This is a surprising and significant change, furthering the intra-group social practice of veganism to other football clubs and their wider stakeholder community:

'When we got into league two our very first game away was at Mansfield and they put on this huge vegan spread and that started to get repeated wherever we went' (FGR Management).

Summary
The two aforementioned themes indicated the array of initiatives that FGR have implemented in transforming the football experience beyond the 90 minutes of the game itself. In some respects, the transition may be viewed as ideologically authoritarian, and this is further discussed in the following section. However, this is different from the dominant paradigm within the data, and even the most ardent football fans recognise and appreciate the more significant social issues that the club has been able to address.

FGR presents a family-friendly environment, encouraging broader stakeholders to witness, experience and learn (Rennings, 2000) about a suite of interconnected SIs. The combinatorial effect of these multiple initiatives lends credence to the authenticity of FGR's commitment to SI, resulting in the adoption of modified social practices (Gallouj et al. 2016). These include the

intra- and inter-group practices of clean energy and experimentation with vegan food, extra-group practices such as feeding and managing playing surfaces, and, once again, experimentation with vegan food. The significance of vegan food must not be overlooked. Just as the media were more concerned with FGR's vegan menus than their footballing success, so are the data sets littered with references to how its influence has shaped the social practices of individuals and institutions.

Emergent Themes
While the above observations provide empirical support for the transition of Cajaiba-Santana's (2014) SI conceptual framework to professional sport, the data also point to two novel themes that need to be integrated into the conceptual framework to fully understand the implementation of SI in a professional sports club. These are labelled 'Personification' and 'Don't forget about the football' and are discussed in the following section.

Personification:
The leadership and personal influence of Sustainable Entrepreneur Dale Vince have been identified as a critical, inspirational and respected driver for FGR to introduce SIs and operate a novel and authentic 'sustainability' value system in the world of professional football. The lifestyle choices and commitment FGR's Chairman has shown in his personal life towards living/championing and 'developing opportunities for people to live more sustainably' is often an important reference point for stakeholders. Dale Vince thus emerges in the data as a go-to reference point synonymous with 'green values', 'veganism', and 'sustainability' and with a 'strong personal conviction to save the world:

'I suppose that's all in tune with his beliefs he's very principled. I suppose he's a bit militant about his own values, and good luck to him as well. I mean obviously, having Dale Vince is a different type of owner that is much more hands-on than a lot of clubs. So that does have positive affects and negative effects. A lot of people don't like him because he comes across as preachy, but he's preaching about something good, so I don't care' (FGR Supporter).

This has resulted in many indicating that FGR has been built as a 'personification' of Dale Vince, without whom the SIs would never have been conceived and nurtured. His commitment to developing the club into 'the world's greenest football team' is well respected and admired by most, with many commenting with a sense of pride on the value of the message the club is sending out to the world of football, sport and business:

'Not everybody has sort of bought into his vegan values, but it's got to be better than having one of these Chairmen that's get rich quick. He's got a long-term plan here' (FGR Supporter); 'Without Dale, it wouldn't be where it is now, would it?' (Local Journalist).

Don't forget about the football:
FGR's achievements in improving its social and environmental impact are widely respected among its fans, residents and global institutions. The range of initiatives that have been employed has engendered the movement with substantial momentum to the extent that it is sometimes perceived to have taken precedence over the club's primary and historical purpose:

'Forest Green Rovers is changing the face of sports sustainability. What this club and Dale are doing is probably bigger than the football club' (FGR Staff).

This is an important dimension to explore since every interviewee and focus group member was keen to express the importance of not forgetting that the number one priority of FGR is playing football:

'We are connected with the UN now for climate change, but it's still the football that counts' (Local Journalist)

'As a football club, the most important thing is to play football, isn't it?' (FGR Staff)

Thus, the data suggest that the on-pitch activity is the first thing FGR must get right. The club's promotion to League Division One in 2022 has undoubtedly aided in affirming its new direction, and one may speculate how further successes will cement the various initiatives. However, should its sporting success not match the acclaim that it receives for its off-pitch endeavours, this would be the litmus test that would confirm the perdurability of any changes that had been brought about in inter- and extra-group social practices:

'We do send out a global message about being ethical, but for me, it's still the football' (FGR Supporter).

Discussion
The data suggest that the impact of seeing FGR's multiple commitments to sustainability helps ease the worries of some visitors regarding FGR possibly 'over-egging their commitment' and engaging in the well-known process of greenwashing. Positive comments were made around FGR's holistic application of sustainable practices, with many indicating a surprise to 'the extent the club has taken it'. This is reflected in the modified conceptual framework (Figure 2) whereby 'New Idea' is replaced by a list of the individual SIs that FGR had implemented.

In assessing how Social Innovation can drive Social Change in the context of professional football and considering the research question, 'How can social innovations be introduced and embedded within a professional sporting institution'? we must consider such 'new ideas'. Each was instigated through material changes in the institution that is FGR, thereby directly shaping the intra- and inter-group practices of those employed directly by the club, the club's supporters, and visitors and opposing teams' fans. In turn, and in time, these practices became diffused through the other social systems that agentic actors inhabit. For instance, FGR's team players, although constrained to adopt a vegan diet while at the club, had voluntarily adopted vegan practices, to different degrees, in their home life. A similar pattern emerged among other club staff, supporters and visitors.

The diffusion of SIs, and concomitant modified social practices, occurred within the club and through the wider social sphere of football, for instance, in the provision of vegan food by host football adversaries. Occasions such as the UN's recognition of FGR as the world's first carbon-neutral football club strengthen the validity of the club's SIs. However, football does not exist in isolation and operates within a wider social context (Kolyperas et al. 2015; Anagnostopoulos and

Shilbury 2013; Brunzell and Söderman 2012). Hence, while under pressure to exhibit socially acceptable and sustainable behaviours, FGR's suite of SIs is seen to be responding to these pressures. Notably, the club's SIs were adopted beyond the world of football by other sporting institutions, and Dale Vince's recognition as a UN ambassador also legitimises the club's actions. In turn, these aid in further substantiating the legitimacy of FGR's SIs; hence they are indicated within the concentric social spheres that operate around FGR in Figure 2.

Finally, among the many continuous and transient agentic actors involved with FGR who serve to modify, adopt and diffuse the social practices, Dale Vince, a changemaker and champion of sustainable entrepreneurship, is a key presence. He has successfully followed his dreams and aspirations as a Social Innovator. Just as FGR has been described as 'the personification of Dale Vince' in the data, by "engineering the deep affects and passions of the self" (Arvidsson and Bandinelli 2013), he may arguably be conceptualised as a brand or institution in his own right. This perspective is credible as the owner of Ecotricity, the holding company of FGR and the primary sponsor within FGR's grounds. To maintain the canon of Cajaiba-Santana's (2014) framework, Figure 2 depicts the agentic actors as exiting within a hierarchy of influence, the apex inhabited by Dale Vince.

In summary, FGR has successfully implemented a wide range of SIs that have been adopted as modified social practices within the immediate environment of the club, the intermediate world of football, and society at large. Among these initiatives, vegan food is a pervasive initiative that has transcended the interconnected social systems. Implementing the suite of initiatives has been crucial in imbuing social actors with a sense of the club's credible commitment to making positive social changes. However, the ability of the club to make material alterations to the practices and infrastructure of the club and the environment for playing and experiencing football by choice-editing staff and visitors' options has been of the utmost importance in gaining momentum in support of the changes (Rogers 2003). As is so often seen in football, a single person is heralded as a champion, saviour or leader of the club, be they the new manager, incumbent manager (if successful) or new owners who promise to reinvigorate a club with a supply of money. Dale Vince is similarly championed by FGR and its supporters and stakeholders who endorse his and the club's social and environmental initiatives (Freeman et al. 2004). However, just as the tide of support may turn for unsuccessful managers of teams, it seems that FGR's social and environmental endeavours will need to be accompanied by continued success on the pitch to maintain their impact.

Figure 2. A Schematic Conceptual Model of the Social Innovation Process in Forest Green Rovers
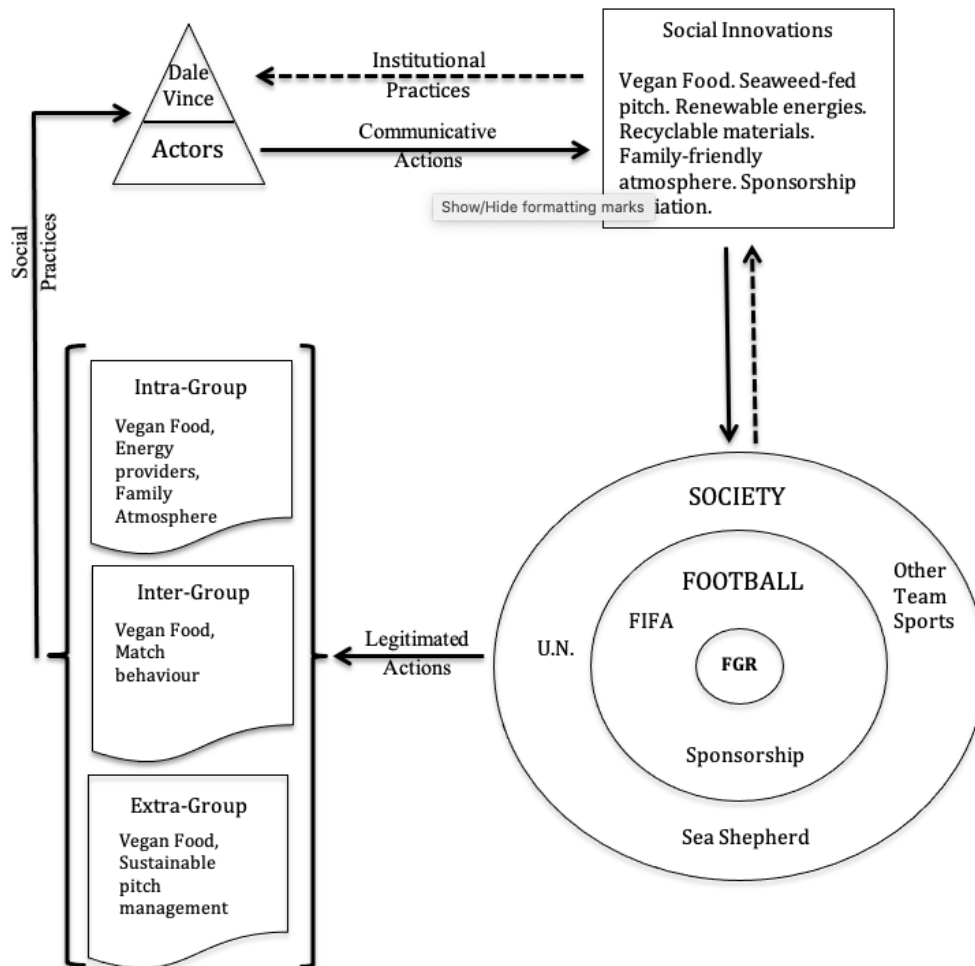
Conclusion

This work contributes to the field by presenting evidence of a changing dynamic beyond commercialisation and commodification, with success built on behavioural evolution and a transformation of what value is within the game. Importantly it does not find the traditional paradox associated with SI and profit maximisation. On the contrary, the vision at FGR is firmly about building a successful team but under the umbrella of sustainability, changing the social conditions within which it is produced.

In addition, the study indicates that sports, particularly those that are significant parts of the fabric of society, can be vehicles for the initialisation and diffusion of impactful SIs. Football is ideal for propagating SIs, as it is a homophilous environment (Hitz and Katsanis 2014) with connected stakeholders displaying certain affinities. The need for audience identification and to be part of what is deemed universal at the club highlights this. Considering FGR as a marketing system, stakeholders are also connected by actions, interactions and exchanges over time and space (Domegan et al. 2019). However, clubs must be mindful that FGR's success has depended on the ability to implement coherent, interlocking ideas and initiatives single-mindedly and largely exclude competing practices through an ambitious moral argument. Importantly we concluded that the continued success of such SI endeavours might also be contingent on sustained sporting achievement.

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How Provisioning Systems Analysis Adds to Marketing Systems Understanding: Exploring the Connections Between Macromarketing and Provisioning Systems Thinking

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Introduction

Fanning et al.'s (2020) concept of provisioning systems has recently been used as a framework for explaining formal, informal, and collaborative market exchange. (Domegan et al. 2019; Fanning et al. 2020; Layton and Domegan 2021; Layton, Domegan, and Duffy 2022; O'Neill et al. 2018). Provisioning systems analysis offers a useful means for marketing systems research to contribute beyond community-based issues or macro social marketing problems and move into contexts that examine the supply of essential resources (Fanning et al. 2020; Kennedy 2017; Layton, Domegan, and Duffy 2022; Sredl et al. 2017; Williams et al. 2020). This paper aims to deepen the connections between macromarketing systems research and provisioning systems research by investigating one such provisioning system.

The context for this paper, New Zealand's (NZ's) electricity supply system, while somewhat atypical for a marketing systems study, was chosen for three reasons. Firstly, NZ's electricity supply is a long-term, infrastructure heavy system, and offers the potential for in-depth, nuanced research into long-term path dependency, stability, and change within a provisioning context (Duffy and Layton 2018). Secondly, logics of market-based competition and efficiencies replaced those of public utility in 1996, when provisioning was transformed from an authoritarian state controlled prescriptive supply system into a fully-fledged market system. This watershed change offers an opportunity for observing the "in between", the tensions arising at the nexus between prescriptive supply and marketing system, as participants jostle for power and control (Miller and Scott 2007; Domegan and Layton 2021). Thirdly, now at a time of advanced technological and environmental change, questions arise over the current structure and design of the electricity markets (and therefore the marketing systems in use) and their fitness for transforming the country into a fully decarbonised economy (Davis 2023; Upton 2023). This research project focuses attention on these core issues.

Literature Review

Provisioning systems

O'Neill et al. (2018) explains the theories of provisioning as derived from ecological economics. In O'Neill et al.'s (2018) terms, provisioning systems are the instruments through which countries apportion, allocate and distribute their biophysical resources to satisfy both basic (energy, education, social support, equality, democratic quality and employment) and wellbeing needs (life satisfaction, and healthy life expectancy). Fanning et al. (2020), explains provisioning system elements as comprised of technologies, including the material stocks built and techniques applied, and the institutions of the state, the commons, households, and markets. As markets and marketing systems are embedded within these broader provisioning contexts, marketing systems of exchange become only one of the many instruments available for provisioning, echoing the work of early macromarketing scholars (Fisk 1981 cited in Benton Jr. 2021).

Provisioning systems and Marketing Systems
Marketing systems reflect the social, cultural, political, physical environments, economic and historical legacies of their communities. They exist to create and deliver assortments, and through exchange, enhance the quality of life of their communities while providing economic benefits for system participants, (Layton 2007, 2015; Wooliscroft 2021). While provisioning system research centres on the meeting of basic and wellbeing needs within sustainable limits, Layton and Domegan (2021) blend Fanning et al.'s (2020) concepts with marketing systems, linking formal, informal and collaborative exchange systems with highly structured, top-down, often public networks of provisioning, which they term prescriptive supply. Key divergences between the two streams include marketing systems' primary focus on exchange and the creation of assortments, while provisioning systems main concern is with the environmental impact of resource allocation and the social outcomes resulting from the use of biophysical resources. For Layton and Domegan (2021) the incorporation of provisioning systems into marketing systems research offers an opportunity to focus on prescriptive supply systems and their relationship with marketing exchange systems. This paper's major contribution therefore is to explore how marketing systems research fits with provisioning systems and consider what provisioning system analysis adds to marketing systems research. The paper's major research question is:

1. What contributions can be made to marketing systems research based on a full provisioning systems analysis of New Zealand electricity system?

The paper furthers Layton and Domegan's (2021) definitions of prescriptive supply systems as hierarchical, top down, publicly structured systems by incorporating Fanning et al.'s (2020) provisioning systems networks of institutional (state, community, household and market) and technological (materials and techniques) elements, and identifies patterns of resource allocation, changing power balances, feedback loops and resulting social outcomes.

Methods
This paper draws upon historical approach methodologies (Golder 2000; Thompson 2010), identifying a comprehensive range of secondary sources that provide both descriptive detail and data saturation of critical events in the development of New Zealand's electricity supply. These are reinterpreted using a provisioning system lens (Saunders et al. 2018). The author collaborated with industry experts to ensure all major events punctuating system development were included and to create more diverse understandings of these (Pederson 2016). Using tables, cycles of categorisation, interpretation and analysis was undertaken to identify the distinct elements of the provisioning and marketing systems, the relationships arising between these elements, feedback loops and outcomes. These analyses are reported below as findings with the full list of secondary sources included in the reference list.

Findings
Within the pre-market era of New Zealand's electricity system significant relationships between provisioning system elements existed, for example, in the early period (pre 1920), a simple system structure saw the state become the country's sole provisioner of electric power (Martin 1991). By designating municipal authorities as responsible for reticulation, the state effectively built a system based on public utility logics, excluded private entrepreneurs and created a centralised provisioning network. Demand and supply feedback loops between government,

municipal authorities and customers (households, industry and communities), saw demand almost continuously outstripping supply, the result of vigorous load building advertising campaigns encouraging consumers to purchase ever greater numbers of electric appliances (Reilly 2008). The effects of strong networked relationships between state, market, household and technologies gave rise to the need for a national electricity provisioning system which modernised both the economy and lives of early and mid 20th century New Zealanders (Martin 1991).

The period from the 1980s to the present is marked by logics of market efficiencies and competition, greatly increased complexity within the provisioning system, many new participant roles, and separation between financial trading and the physical supply of electricity. The most powerful members within the provisioning system are now meso level regulators and incumbent generating retailers (gentailers), driven by commercial interests (The EA 2022). These gentailers develop their own marketing systems selling electricity on the wholesale and ancillary services markets. Their retail arms along with independent retailers offer assortments for consumers and industry through pricing plans and bundled offerings, improving customer quality of life, and creating financial benefits for their shareholders, conforming to Layton's (2007) description of a marketing system. From a provisioning system analysis however, these powerful incumbents appear less aligned to the long-term interests of households, communities and industry alike (i.e. the commons). For example, ministerial reviews of market performance periodically consider poor social outcomes relating to electricity affordability and supply continuity (MBIE 2022) and recent commentary suggests that the pricing mechanisms used within the market system continue to create benefits for fossil fuel use, disincentivising investment in additional renewable capacity (Davis 2023, Upton2023). From a provisioning system perspective, market logics appear to effectively decouple the system from long-term interests of the state, households and the commons, with resource allocation decisions focused primarily on profitability rather than minimising biophysical resource use and maximising social good.

Discussion
The analysis examines the pre and post market development of a longstanding provisioning system, one that conforms to Layton and Domegan's (2021) description of prescriptive supply, as top down, authoritarian and slow to change. The key aim of this paper is to initiate a discussion of how marketing systems research fits within infrastructure based provisioning systems, and to consider how provisioning system analysis adds to marketing systems research. To examine the first of these points, Fanning et al.'s (2020) provisioning systems lens is used to observe the system's early pre-market configuration, with high levels of integration between institutional elements (state, municipal authorities, household, and the commons) while post 1996, market logics and the development of gentailer marketing systems significantly lessened alignment between the institutional elements of market, state, households and the commons at both the macro (decarbonisation aims) and micro (social outcomes) levels. For the second point, provisioning systems analysis adds to market systems research by aiding understanding of Layton and Domegan's (2021) prescriptive supply systems, explaining these as technological and institutional elements of long-term, complex, socially networked relationships existing between the macro (state), the meso (regulators, incumbents, market exchange), and micro (household and community) levels.

Conclusions, Limitations and Future directions.

This paper achieves its overall aim of unpacking Layton and Domegan's (2021) concept of prescriptive supply systems using a provisioning systems lens and offers an initial contribution to thinking about marketing systems in an atypical context, that is, as a long term provisioning system that combines institutional and technological elements. Defining linkages between marketing and provisioning systems under future transformation is a matter of great urgency and further research is needed to explore adaptation within provisioning systems due to climate change and social equity pressures. Marketing systems work dealing in this space can contribute a valuable perspective.

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Social Marketing for Global Change: Aligning Social Marketing with the UNSDGs Track

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Driving Delegitimation in the Marketing System

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Wicked problems such as obesity, environmental degradation, and fast fashion are bound up in a failing marketing system, where self-organized stakeholder action, along with policy and regulations can be used to intervene (Williams, Davey, and Johnston 2021). Macro-social marketing helps to analyse the above mentioned. That is to say, macro-social marketing. According to a macro-social marketing perspective however, intervention would aim to change the underlying institutional norms that perpetuate the wicked problem driving system failure (Kennedy 2016). Self-organisation within a system is needed to "generate patterns leading to evolution of norms, conventions, rules, structures and institutions" (Layton 2015, p7). However current literature does not focus on explaining how individuals or macro-social marketers might group together and 'self-organise' to drive system change through changing institutional norms within the marketing system. Neither does it provide an understanding of the dynamic change process of institutional norms so that Macro-social marketers might intervene. We posit that such a process would deliver *delegitimation* of existing institutional norms, and creation of new or blended norms to replace them. As such, the aim of this study is to propose how delegitimization of institutional norms can bring about marketing system change – with the use of self-organisation. To do this we combine marketing systems literature with institutional theory and use examples from the Fashion Revolution organisation in its quest to change the fast fashion system. This paper adds to the existing scholarly conversation by providing a conceptual framework of how macro-social marketers can drive delegitimation of institutional norms in the marketing system. The same institutional norms perpetuating wicked problems in the marketing system, causing marketing system failure.

Society is a set of systems responding to problems (Dixon 1984). These problems may include knowledge and skill attainment (e.g. education); regulation and governance (e.g. law/government); and resource distribution (e.g. supply chains and marketing) – each forming institutions. Social systems are structured around actors and their relations and interactions with each other (Dixon 1984). Among social systems, marketing systems' key task is creation and delivery of value by way of "goods, services, experiences, and ideas" (Layton 2015, p. 4) and are somewhat of a mediator between cultural and other social systems. Social marketers are part of these systems. Previous work in marketing systems has expanded systems thinking within the marketing and social marketing disciplines (Biroscak et al. 2014; Kennedy and Parsons 2012; Kennedy 2016; Truong, Saunders, and Dong 2018; Venturini 2016; Zurcher, Jensen, and Mansfield 2018). Moving from a neoliberal "market system" viewpoint of economic exchanges (Jagadale, Kadirov, and Chakraborty 2018) to the dynamic and evolving contrast of "marketing systems" which "are emergent, acting and reacting to changes in technology, culture, norms, customs, institutional logics, and disruptions…over time" (Domegan et al. 2020, p. 380).

In many contexts however, we find marketing system failures, resulting in negative externalities (Wooliscroft and Ganglmair-Wooliscroft 2018) such as with plastic packaging effects (Williams,

Davey, and Johnston 2021); obesity (Kemper and Ballantine 2017), smoking (Kennedy and Parsons 2012) and fast fashion contexts (Kennedy 2016). Such failures occur when negative externalities are unforeseen and no protection is given, and imperfect competition and lack of consumer choice locks in a path to destruction (Williams et al. 2021). Those authors have identified areas where intervention may occur to resolve marketing system failure, and state that self-organized stakeholder action, along with policy and regulations can be used to intervene. That is to say, macro-social marketing. However, there discussion does not explicate on self-organized stakeholder action beyond commercial collaboration such as with circular supply changes and horizontal/vertical integration.

According to a Macro-social marketing perspective however, intervention in a marketing system in wicked problem contexts might also be instigated by Macro-social marketers, community groups, and consumers (Kennedy 2016). From Kennedy's (2016) perspective, intervention would occur to change the underlying institutional norms that are perpetuating a wicked problem and driving system failure. However, the Macro-social marketing framework proposed by Kennedy (2016) does not provide clear explanation of this dynamic change process beyond citing "social mechanisms" from Layton (2015), nor does it expand on the self-organisation process and role within system change.

Layton's (2015) seminal Mechanism, Action, Structure (MAS) theory focuses on the key constructs that make up marketing systems and interactions within the system. As such, social mechanisms that can create change include co-evolution, cooperation, scale, and emergence which is referred to "the way in which self-organisation in complex systems generates patterns leading to evolution of norms, conventions, rules, structures and institutions" (Layton 2015, p.7). The latest work in the area has focused on which dynamic processes can be leveraged for change (Domegan et al. 2020; Layton 2015; Kennedy 2016), identifying the need for further understanding of actors and the change processes within social action fields (Layton and Duffy 2018). Literature working towards this aim provides clear methods for researching collaborative, multistakeholder approaches to change, to explain the role of agency and interrelationships and interdependencies (e.g. Domegan et al. 2020). Other work analyses the motivations of actors (Kennedy et al., 2017) and the effects of the marketing system on the actors in the form of negative externalities (Duffy, Northy, and van Esch 2017; Wooliscroft and Ganglmair-Wooliscroft 2018) through marketing system failures (Williams et al., 2021) and community involvement in alternative provisioning system creation (Layton and Domegan 2021; Layton, Domegan, and Duffy 2022).

The Dynamic Stakeholder Framework (Domegan, McHugh, Flaherty, and Duane 2019), which combines MAS theory and Coleman's boat, provides a further eight propositions that explain some of these causal dynamics between stakeholders. Each stakeholder has a frame which guides their actions and is made tangible through market offerings and exchanges that epitomise these values (e.g. value based exchanges). However, it is self-organisation of stakeholder groups that can then be used to drive collective actions and forge creation or destruction of what constitutes valuable marketing exchanges and outputs from a marketing system. It is this self-organisation within a system that can "generate patterns leading to evolution of norms, conventions, rules, structures and institutions (Layton 2015, p7). But as per calls from Layton (2016) and following the work of Domegan et al. (2019) and Domegan et al. (2020), gaps remain in understanding

what causes broader systems change in such a way and how we might leverage that knowledge to drive positive social change as macro-social marketers.

Institutional theory is appropriate to combine with marketing systems theory as it shares many of the same premises and is useful in expanding our knowledge of actor influences in marketing system change (Wiebe and Mitchell 2023). It also allows for more specific conceptualisations of practices beyond patterns of behaviour change provided in some current marketing systems work (Hampel, Lawrence, and Tracey 2018; Wiebe and Mitchell 2023). Essentially, institutional theory can help further explain actors' roles and processes in marketing system construction, and destruction (Coleman, Zayer, and Karaca 2020; Dolbec and Ficher 2015). Considering institutional norm change, Kemper and Ballantine (2017) present an approach for Macro-social marketers to plan for such change and list multiple strategies. These include Adaptive capacity (e.g. research, service provision); Landscape pressures (e.g. communications/marketing, media advocacy, social movements); Downstream social marketing (e.g. service provision, social marketing); Midstream social marketing (e.g. service provision); and Upstream social marketing (e.g. regulation, social/environmental planning). However, they do not explicate the process by which implementation of these would drive change.

One such area that can contribute to understanding the change process is that of institutional entrepreneurs who aim to change markets or create institutional change (Battilana et al. 2009; DiMaggio 1988). The activities they do to drive change are labelled 'institutional work' (Lawrence and Suddaby 2006). Such actors are understood here as (macro-social) marketers or consumers, who purposefully mobilize resources to support self-interests and drive change in existing institutional structures (DiMaggio and Powell 1983; Maguire et al. 2004). Macromarketing literature focusing on institutional theory has recently focused on the State's role in market change for Uber and Lyft (Wiebe and Mitchell 2023). Others the use of institutional work by brands to legitimize themselves and contested markets (Coskuner-Balli, Pehlivan, and Hughes 2021), along with its use by advertising professionals to deal with conflicting institutional logics (Coleman, Zayer, and Karaca 2020). However, while Coskuner-Balli et al. (2021) and Coleman et al.'s (2020) work provides context specific actions being undertaken and links them to macro themes, they do not provide theoretical explanations for the underlying processes of change. This leaves the call for further research on the processes catalysts might use to instigate change, unanswered (Coleman et al. 2020). Especially with regards to institutional norms because norms are challenging to change as they are influenced by social and historical development.

Consumers can also do such institutional work if they co-ordinate themselves (King & Pearce 2010; Rao 2009) such as with boycotts (Khan et al. 2007). However, specific tactics to obtain change have not been examined in the literature (Slimane et al. 2019). Previous marketing literature using institutional theory has considered market and logic creation (Dolbec and Fischer 2015; Kjeldgaard et al. 2017; Scaraboto and Fischer 2013;), even with the use of consumers as institutional entrepreneurs (Morrish and Earl 2020; Nguyen et al. 2020; Scaraboto and Fischer 2013), but has not considered delegitimation and the potential for institutional entrepreneurs to drive this. Consumer research on delegitimation, which is embedded in the concept of deinstitutionalisation, has looked at some of the pressures for change (Oliver 1992). Prior studies have examined what drives market change and disruption. For example, Baker et al. (2019)

found that for field disruption to occur, there is a need for market decline and market creation. Several studies also emphasised the importance of consumers in being change agents (see Dolbec and Fischer 2015; Scaraboto and Fischer 2013; Thompson and Coskuner-Balli 2007). Consumers therefore can play a crucial role in challenging prevailing logics that support the status quo (Martin and Schouten 2014). However, challenging the status quo in some marketing systems (e.g. fast fashion or fast moving consumer goods) can prove to be difficult due to social recourse and cultural construction. This in turn, creates values and norms that different audiences accept and see as legitimate (Tuncay, Zayer, and Coleman 2015), amounting in market shaping.

Wiebe and Mitchell (2023) examined market shaping practices using an institutional work perspective and proposed three perspectives on change in institutional theory – collaboration, conflict, and control. The article took a collaborative change model approach and states that previous work in marketing systems dynamics, also takes this approach (e.g. Domegan et al. 2019; 2020; McHugh and Domegan 2013). In that approach "change [arises] from interactive, shared decision-making, with disparate views and interests being accommodated simultaneously (Lawrence, Hardy, and Phillips 2002; Reay and Hinings 2009)" (Wiebe and Mitchell 2023, p19). Our proposed framework takes an alternative approach using a conflict perspective. Whereby we view groups mobilizing and asserting their alternative institutional norms by negotiation, and construction of structures and mechanisms which aid to shift and change the marketing system (Wiebe and Mitchell 2023). This is supported by recent articles on delegitimization using message framing which also takes a conflict-based perspective (Koch and Ulver 2022; Valor, Lloveras, and Papaoikonomou 2021). Koch and Ulver (2022) identify markets as "institution[s] in transformation" (248). The use of conflict framing in message rhetoric can contribute to delegitimization of one product (cow's milk) and drive legitimization of another (plant-based milks). The authors found that problematization of market-driven conflict implies interactions between oppositions and delegitimization is driven by market-industry boundary spanners, as opposed to insiders and outsiders. While, Valor, Lloveras and Papaoikonomou (2021) find that consumer practices can be delegitimized using emotional prototypes within pathic stigmatization, using emotion to drive delegitimization. In both cases, they explore delegitimization strategies, but delegitimation is also a process and delegitimation of marketing systems needs to be examined over time. We include and expand on this work to go beyond message framing/rhetoric use as one strategy to drive delegitimization, and instead focus on exploring the overall process from a marketing systems perspective of delegitimizing institutional norms, starting with self-organization and finishing with alternative, legitimized institutional norms, that drive fundamental marketing system change.

Current literature does not focus on explaining how individuals or Macro-social marketers might group together and 'self-organise' to drive system change through changing institutional norms within the marketing system. Neither does it provide an understanding of the dynamic change process of institutional norms so that Macro-social marketers might intervene. We posit that such a process would deliver *delegitimation* of existing institutional norms, and creation of new or blended norms to replace them. As such, the aim of this work is to propose how delegitimization of institutional norms can bring about marketing system change – with the use of self-organisation. To do this we combine marketing systems literature with institutional theory and use examples from the Fashion Revolution organisation in its quest to change the fast fashion system. This paper adds to the existing scholarly conversation by providing a conceptual

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