MACROMARKETING
SOCIETY

Proceedings of the 50th Annual Macromarketing Conference

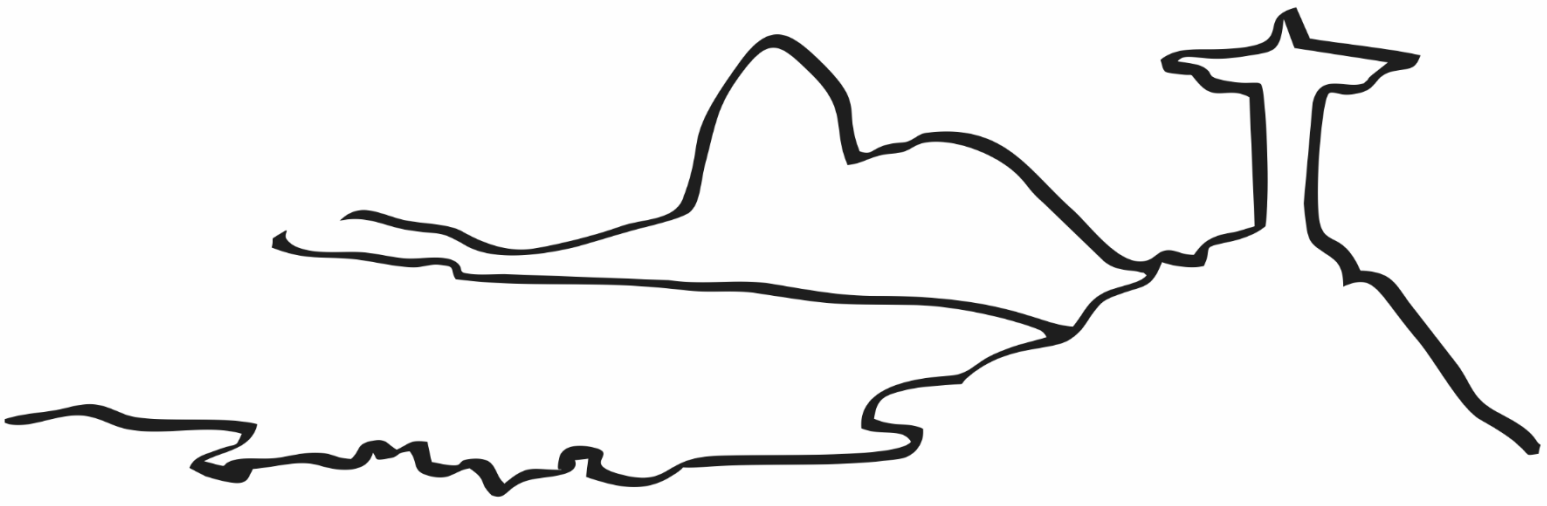
Rio de Janeiro, Brazil
June 22nd to 25th, 2025

MACROMARKETING CONFERENCE 2025

PUC RIO

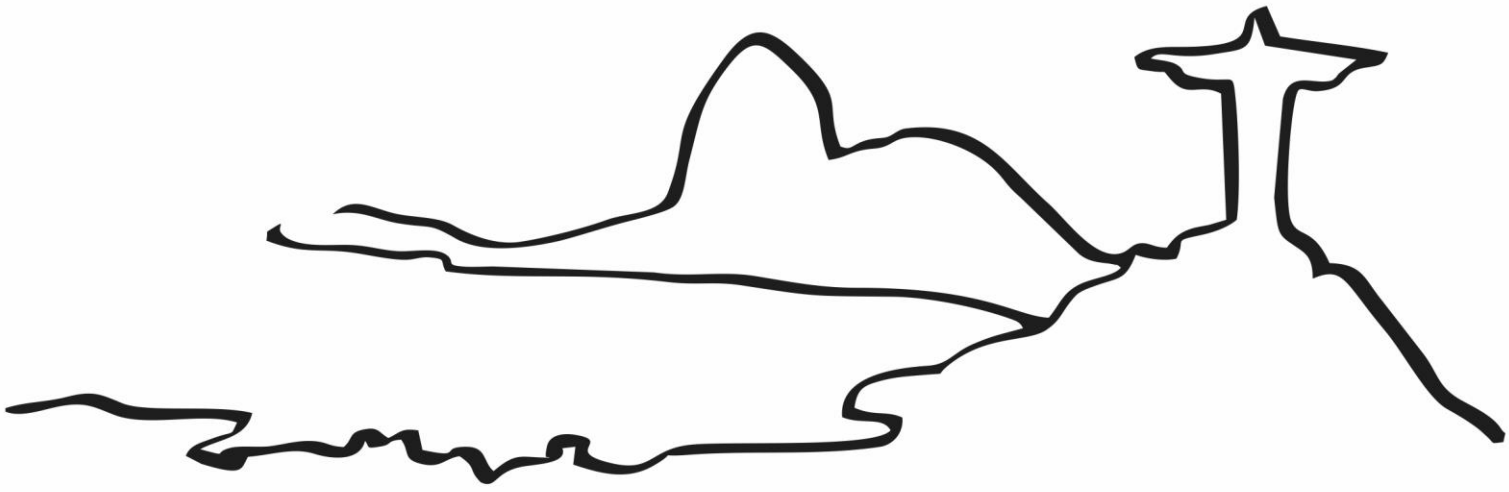
iag ESCOLA DE NEGÓCIOS PUC-RIO

FGV ECMI SCHOOL OF COMMUNICATION, MEDIA AND INFORMATION





Questioning markets and marketing: advancing Macromarketing from multiple worldviews



50th Annual Macromarketing Conference
Rio de Janeiro, Brazil
June 22nd to 25th, 2025

Conference Co-Chairs:
Marcus Wilcox Hemais, Pontifical Catholic University of Rio de Janeiro
João Felipe Rammelt Sauerbronn, Getulio Vargas Foundation

Conference Assistants: Ana Kazz, Andreza Paiva, Anne Zehoul, Beatriz Hossmann, Diogo Lannes, Emily Peñaloza, Juliana Turano, Lucas Lima, Morgany Leite, Rayanne Vargas, and Wellington Fortunato

The conference chairs gratefully acknowledge the generous support from the Pontifical Catholic University of Rio de Janeiro, the Getulio Vargas Foundation, and the Fundação de Amparo à Pesquisa do Estado do Rio de Janeiro - Faperj in helping to organize the 50th Annual Macromarketing Conference.

Copyright Statement
The Macromarketing Society Inc. does not take copyright for papers appearing in the proceedings. The copyright of all papers or abstracts in the proceedings remains that of the authors.

All full papers, extended abstracts, and abstracts in these proceedings have been peer-reviewed.

Published by the Macromarketing Society, Inc. in 2025.
ISSN 2168 - 1481.

Please refer to these proceedings in the following format: Hemais, Marcus and João Felipe Sauerbronn eds. (2025). Proceedings of the 50th Macromarketing Conference. Pontifical Catholic University of Rio de Janeiro, Brazil. Macromarketing Society.

Join the Macromarketing Society online

Macromarketing shares all the latest news about the society and the journal on social media. Join us on LinkedIn, Facebook, or Twitter to keep up-to-date.

- LinkedIn: https://www.linkedin.com/company/journal-ofmacromarketing)
- Facebook: https://www.facebook.com/groups/171639719535654
- Twitter: https://twitter.com/MacromarketingS

Have some Macromarketing news to share? Email our VP of Communications, Jie Fowler at jgfowler@valdosta.edu

Our 2025 Macromarketing Conference in Rio de Janeiro, Brazil

A warm welcome from the Macromarketing Society. The theme of our 2025 Macromarketing Conference was "Questioning Markets and Marketing: Advancing Macromarketing from Multiple Worldviews." What a fitting theme for our first conference in the Global South.

A great deal of marketing scholarship has focused on micro-level phenomenon, such as activities of consumers or companies. Such research is undoubtedly important but does not include the full picture that accounts for the wider dimensions of marketing – which is where macromarketing comes in. Spanning more than 50 years, from the start of Macromarketing's formal annual seminars in 1976 and the beginning of our *Journal of Macromarketing* in 1981, macromarketing scholars have been doing just that.

To focus on these wider dimensions, we need to listen to and learn from multiple worldviews. While marketing is found everywhere across the globe, traditional marketing discourse has often remained heavily dominated by and in the Global North. This prioritization misses important theoretical and practical insights, undermining marketing thought. Given that macromarketing calls for an understanding of wider interactions and implications within and between marketing systems, marketing, and society, macromarketers are well placed to include multiple worldviews. Macromarketers need to question the norm towards cultivating deeper insights from the lived experiences of people across our world.

It is in this spirit that I am thrilled to have been part of our first Macromarketing Conference in the Global South. Over 100 other researchers come together with upbeat energy, focused on creating positive social change. We exchanged ideas, research, and friendship (and shared a pretty impressive dance party!). Time and time again, I hear that people come to our Macromarketing conferences because they are interested in the wide range of topics we focus on, but it is the people who keep them coming back. Macromarketing scholars have a reputation for being friendly and welcoming, and I believe we lived up to our reputation at this conference.

To our conference co-chairs, Dr. Marcus Wilcox Hemais from IAG Business School at the Pontifical Catholic University of Rio de Janeiro and Dr. João Felipe Sauerbronn from the School of Communication, Media, and Information at the Getulio Vargas Foundation, as well as the large team of much appreciated staff and volunteers (see the Conference Co-Chairs address for the full list), thank you so much for making this conference a success. Also, a deep thank you to our board members, presenters, audience members, track chairs, reviewers, and panelists for their hard work.

I hope you enjoy reading through the proceedings of our 2025 Annual Macromarketing Conference which covers a range of important socially relevant topics. We hope to welcome you (back) to our Macromarketing conferences in the future.

Sincerely,

Dr. Stefanie Beninger
President of the Macromarketing Society, Inc.
August 25, 2025, the Netherlands

A word from the 2025 Macromarketing Conference Co-Chairs

It was a great pleasure for us, Marcus and Felipe, to chair the 2025 Macromarketing Conference. For its 50th edition, the conference moved for the first time to the Global South, in the beautiful and sophisticated city of Rio de Janeiro, Brazil.



Photos by Agustin Diaz Gargiulo on Unsplash

The conference was held at the Pontifical Catholic University of Rio de Janeiro (PUC-Rio), with its beautiful campus and amazing view of the Christ the Redeemer statue, one of the New Seven Wonders of the World.



The conference's theme was "Questioning Markets and Marketing: Advancing Macromarketing from Multiple Worldviews." We chose this theme looking to engage the Macromarketing community in discussing the roles of businesses, governments, and non-governmental organizations in building, transforming, and maintaining more balanced markets, achieving results that lead to the well-being of people and the flourishing of societies.

Over four days, the conference featured a variety of academic activities in line with its theme: an Early Career Scholars Event; 27 sessions, in which 98 papers were presented; four panels; and a keynote address.

After all was said and done, the 2025 Macromarketing Conference was considered a success. However, we, the conference chairs, had a lot of help to achieve this, which we are more than pleased to acknowledge.

The Macromarketing Society supported us from the very start of this project, accepting unconditionally our proposal to host the conference in Rio and helping us promote the event. In particular, we would like to thank the Executive Board members, Stefanie, Francisco, Alex, Stephanie, and Jie, who worked hand in hand with us to make this happen. To all of you, our deepest gratitude.

We would also like to thank the Fundação de Amparo à Pesquisa do Estado do Rio de Janeiro (Faperj), which awarded us a grant, essential for helping to finance the Conference.

The Getulio Vargas Foundation, through its School of Communications, Media, and Information, is another organization that deserves our thanks for its support of the conference.

The conference would have never occurred if it were not for the support of the Pontifical Catholic University of Rio de Janeiro and, in particular, the IAG Business School. To all faculty (in particular, Alessandra Costa, Renata Brito, Alessandra Baiocchi, and Clarice Kogut) and especially staff (in particular, Gabriel, Gisele, Flavio, Marcus, Julio, Flavio, Tiago, Matheus, Carlos, Rian, and Bruno) who got involved with and behind us in organizing the event, we are immensely grateful.

he conference was attended by 101 participants, from 17 countries and 60 Higher Education Institutions, including master's and PhD students, early career scholars, and academics, both at a middle stage of their careers and more experienced. Your presence during the event was what made it alive! Thank you for coming and supporting the conference.

In total, the Macromarketing Conference 2025 featured 25 themes, chaired by 57 academics, who helped throughout the review process of the papers submitted to these themes. We would greatly like to thank the track chairs for their tireless work. You really made a difference!

Surely, one of the highlights of the conference was the keynote speech given by Professor Maria Sylvia de Oliveira, from Geledés – Instituto da Mulher Preta. Her moving presentation, addressed in Portuguese with simultaneous translation to English, entitled "Macromarketing as a Tool for Racial Justice: The Economic Empowerment of Black Women," made the macromarketing community reflect upon the hardships of black women in the Brazilian scenario and how the field should act to help with the situation. Maria Sylvia, thank you for giving us a life lesson and for sharing your wisdom with us.

We were also very pleased to have had four panels during the conference, which led conference participants to engage with relevant topics in the field of macromarketing. Thank you to all 12 colleagues who put together and ran these incredible panels.

We had a great group of 11 volunteers helping us during the conference. Their livelihood surely made the 2025 Macromarketing Conference pulse more intensely. Ana, Andreza, Anne, Bia, Diogo, Emily, Juliana, Lucas, Morgany, Rayanne, and Wellington, thank you for your enormous generosity, dedication, and responsibility. You were exemplary!

Lastly, but absolutely no less important, we must give a very special thanks to Raquel and her staff, Patricia and Paula, from SKL. Your work ethic is absolute, and your dedication is unseen. The level of detail and care you gave to organizing the conference is surely one of the main reasons why it was successful. Your work deserves all the praise we can give.

We truly hope the 2025 Macromarketing Conference has left a mark on the long history of this prestigious conference. It was a collective effort, which we are truly proud to have contributed to.

See you at the next conference

Marcus and Felipe
Co-Chairs of the 2025 Macromarketing Conference
Rio de Janeiro, RJ, Brazil

Keynote Speaker



The keynote address at the Macromarketing Conference 2025 was given by Prof. Maria Sylvia de Oliveira, from *Geledés - Instituto da Mulher Negra*. Her lecture was entitled "Macromarketing as a Tool for Racial Justice: The Economic Empowerment of Black Women."

Dr Maria Silvya de Oliveira is Lawyer, Executive Director, and Coordinator of the Gender, Race and Equity area of *Geledés - Instituto da Mulher Negra*; Master in the Graduate Program in Humanities, Rights and other Legitimacies – Diversitas of the Faculty of Philosophy, Letters and Human Sciences/University of São Paulo

Conference Tracks

Conference Tracks and their respective Chairs and E-mails are listed below alphabetically

Tracks	Track Chairs	E-mails
A macromarketing perspective on consumer transformation	Larissa Becker	larissa.becker@hanken.fi
	Pia Polsa	pia.polsa@hanken.fi
Advancing Macromarketing through Artificial Intelligence: Prospects and Pitfalls	Petteri Repo	petteri.repo@helsinki.fi
	Alex Reppel	alexander.reppel@rhul.ac.uk
Agribusiness and Food Marketing	Claudia Dumitrescu	Claudia.Dumitrescu@cwu.edu
	Renée Shaw Hughner	renee.shaw@asu.edu
Consumers as Change Agents	Mahsa Ghaffari	mahsa.ghaffari@port.ac.uk
	Lin Su	Lin.su@surrey.ac.uk
Degrowth, Post-Growth, and Equitable Growth	HandanVicdan	vicdan@em-lyon.com
	Pii-Tuulia Nikula	pnikula@eit.ac.nz
	Stefanie Beninger	s.beninger@nyenrode.nl
Designing healthcare ecosystems, innovation in life sciences and market access principles for a more sustainable, efficient and inclusive health future	Frédéric Jallat	jallat@escp.eu

Tracks	Track Chairs	E-mails
Ethics, Equity and Social Justice	Cathy McGouran	C.Mcgouran@liverpool.ac.uk
	Ann-Marie Kennedy	Ann-marie.Kennedy@canterbury.ac.nz
	Nicky Santos	NicholasSantos@creighton.edu
Externalities	Shoaib M. Farooq Padela	s.padela@bradford.ac.uk
"Interesting! How Relevant Is It?": Research Relevance from a Macromarketing Perspective	Benjamin Rosenthal	benjamin.rosenthal@fgv.br
	Roberta Campos	roberta.campos@espm.br
Globalization, (Neo)colonialism and Marketing	Olga Kravets	Olga.Kravets@rhul.ac.uk
	Marcus Hemais	marcus.hemais@iag.puc-rio.br
Healthcare Marketing: Challenges and Opportunities in a Global Landscape	Mark Peterson	markpete@uwyo.edu
	Jeff Wang	jeff.wang@monash.edu
Historical Research in Marketing	Francisco Conejo	francisco.conejo@incae.edu
	Oksana Domina	oksana.domina@helsinki.fi
	Jayne Krisjanous	jayne.krisjanous@vuw.ac.nz
	Terrence H. Witkowski	terrence.witkowski@csulb.edu
Latin American Perspectives in Macromarketing: Theories, Contexts, and Transformations	Isabela Morais	isabela.morais@ufop.edu.br
	Jaqueline Pels	jpels@utdt.edu
	Marlon Dalmoro	marlon.dalmoro@ufrgs.br

Tracks	Track Chairs	E-mails
Macro Approaches on Markets, Organizations and Digitization	Fernando R P Marques Vianna	fernandovianna@utfpr.edu.br
	Renata Couto de Oliveira	renata.coutoazevedo@unigranrio.edu.br
Macromarketing Methods and Measurement	Ben Wooliscroft	ben.wooliscroft@aut.ac.nz
	Francisco Conejo	francisco.conejo@incae.edu
	Anthony Samuel	samuela3@cardiff.ac.uk
Macromarketing Pedagogy	Julie V. Stanton	jvs11@psu.edu
	Stanley J. Shapiro	stanley_shapiro@sfu.ca
	Forrest Watson	watsonf@dickinson.edu
Marketing Systems from the Global South	Sujit Jagadale	sujitj@iimamritsar.ac.in
Meaningful Consumption Systems	Amy Errmann	amy.errmann@aut.ac.nz
Moving beyond the 'stigma turbine'? Contributions from macromarketing	Himadri Roy Chaudhuri	himadri@xlri.ac.in
Poverty and Consumption	Caroline Moraes	c.moraes@bham.ac.uk
	Morven G. McEachern	m.mceachern@chester.ac.uk
	Deirdre O'Loughlin	Deirdre.OLoughlin@ul.ie
Pricing and Societal Welfare: The Macromarketing Perspective	Jose Mendoza	jose.mendoza@nyu.edu

Tracks	Track Chairs	E-mails
Quality of Life and Wellbeing	Alexandra Ganglmair-Wooliscroft	A.Ganglmair@massey.ac.nz
	Ahmet Ekici	ekici@bilkent.edu.tr
Race, Racism and Marketplace Inequities and Resistance	June Francis	francis@sfu.ca
	Ana Raquel Rocha	anaraquelrocha@id.uff.br
	Denise Franca Barros	denisefb@id.uff.br
	Flavia Luzia O C Galindo	flaviagalindo@uol.com.br
Scams, Scammers, and (Macro)marketing	Olga Kravets	Olga.Kravets@rhul.ac.uk
	Benjamin Rosenthal	benjamin.rosenthal@fgv.br
	Victoria Rodner	victoria.rodner@ed.ac.uk
Social Conflict, Marketing and Well-Being	Clifford J. Shultz, II	cjs2@luc.edu
	Andres Alberto Barrios Fajardo	andr-bar@uniandes.edu.co
Society, Politics, and Branding: Macromarketing Views on Activism	Christian Koch	christian.koch@hkr.se
	Antonella Cammarota	antonella.cammarota@unitelma sapienza.it
Sustainability and Climate Action	Sabrina Helm	helm@arizona.edu
	Joya Kemper	joya.kemper@canterbury.ac.nz
	Vicki Little	vicki.little@rmit.edu.vn
Violence, Markets and Marketing	Maira Lopes	maira.lopes@rhul.ac.uk
	Luciana Velloso	l.velloso@gold.ac.uk
	Rohit Varman	r.varman@bham.ac.uk

Panel Discussions

During the conference, four thematic panels were held on various topics related to the field of macromarketing. These panels featured panelists of varying nationalities, levels of seniority in marketing academia, gender, and research interests. The following are the four panels that took place during the conference, as well as the panelists who participated in them:

Panel 1 - Social Conflict – New and Nuanced Spaces for Marketing Research

Panelists:

Andrés Barrios

Cliff Shultz

Jaqueline Pels

Marcus Hemais

Oscar Naranjo

Panel 2 – Macromarketing Research in Latin America: Opportunities and Challenges for Sustainable Development

Panelists:

Andrés Barrios

Flavia Cardoso

Francisco Conejo

Jaqueline Pels

João Felipe Sauerbronn

Panel 3 – Designing healthcare ecosystems, innovation in life sciences and market access principles for a more sustainable, efficient and inclusive health future

Panelists:

Andrés Barrios

Clara Freire Filgueiras Faro

Cliff Shultz

Frédéric Jallat

Jeff Wang

Pia Polsa

Panel 4 – From Extraction to Collaboration: Building New Academic Relationships in Macromarketing with the Global South

Panelists:

Denise Barros

Jaqueline Pels

João Felipe Sauerbronn

June Francis

Papers Presented During the 2025 Macromarketing Conference

A Macromarketing Perspective on Consumer Transformation

Track Chairs:
Larissa Becker, Hanken School of Economics, Finland
Pia Polsa, Hanken School of Economics, Finland

Coletivo Perifa Alimenta: production and consumption of transformative food
Ricardo Zagallo Camargo
André Krassuski Fonseca
Ana Clara Soares Rasquel de Oliveira
Fernanda Cury
Fernanda Guarany Teixeira
Luana Sandrault Schwab
Luca de Ascenção Dias Lopes
Maria Vitória de Oliveira Silva
Marcos da Silva e Silva
Fernando Jorge Silva

Consumption as a Way to Retain Lost Identities: New Forms of Wine Consumption Among Generation Z Consumers in Greece
Zoe Liakou
Mahsa Ghaffari

Credit Consumption and Indebtedness: Challenges and Implications for Macromarketing
Danielli Leite Campos Monteiro
Verónica Peñaloza
Luiz Alves Cruz

Easy money? How digital influencers promote online gambling to Brazilian consumers
Luiz Arthur Neves Lopes
Lucia Barros

Food Labels that (Dis)inform Consumers: A Study on Ultra-Processed Foods
Marcos Praxedes da Silva
Andres Rodriguez Veloso
Marcelo Praxedes da Silva

How to advance the study of compulsive consumption in macromarketing?
Larissa Becker

Opening The Gates: Bringing Gatekeeping Theory To Marketing
Ricardo Gomes do Amaral Filho
Lucia Barros
Benjamin Rosenthal

Whose responsibility is overconsumption?
Pia Polsa

Advancing Macromarketing through Artificial Intelligence: Prospects and Pitfalls
Track Chairs:
Petteri Repo, University of Helsinki, Finland
Alex Reppel, Royal Holloway, University of London, United Kingdom

"What, me worry?"—Exploring the need for regulation to address uncertainties around generative artificial intelligence
Alex Reppel
Julie Stanton
Stefanie Beninger
Forrest Watson

Can AI confront inappropriate behavior?
Gabriela Rauber
Lucia Barros
Julia Schuckmann
Ana Valenzuela

Supervising AI for Macromarketing: Contrasting logics in coding ambiguous and contextual data
Mikhail Bogach
Petteri Repo
Päivi Timonen

The Impact of AI-Mediated Anti-Scamming Revenge Actions on Customer-based Organizational Reputation: The Moderating Roles of Perceived Ethicality and Moral Credit
Oluwatobi Ogunmokun
Emmy Yeung

Agribusiness and Food Marketing
Track Chairs:
Claudia Dumitrescu, Central Washington University, United States
Renée Shaw Hughner, Arizona State University, United States

Exploring Indigenous Food Systems in Arizona: Challenges in the Path Towards Food Sovereignty
Renée Shaw Hughner
Lauren Chenarides
Ashok Mishra
Claudia Dumitrescu

Gastronomy as a Driver of Development: Connections Between Place Branding, Gastronomic identity and Local Agro-Food Value Chains
Diogo Lannes Mello
Alessandra Baiocchi

Consumers as Change Agents
Track Chairs:
Mahsa Ghaffari, University of Portsmouth, United Kingdom
Lin Su, Surrey International Institute, United Kingdom

"Cooperate to win together": a scientometric review of prosumers on cooperative platforms
Alexandre Borba da Silveira
Arnaldo Rizzardo Filho
Jefferson Marlon Monticelli

Unbolting consumer power: Bypassing tactics for reshaping markets
Karin Brondino-Pompeo
Isabela Carvalho de Morais

Why Do People Live Alone Around the World? A Study on Sociodemographic Variables and Cultural Dimensions That Explain This Phenomenon.
Pedro Paulo Santos Cavalcante
Miguel Al Behy Kanaan Coelho
Evandro Luiz Lopes
Suzane Strehlau
Vivian Iara Strehlau
Eduardo Mesquita

Degrowth, Post-Growth, and Equitable Growth
Track Chairs:
Handan Vicdan, Emlyon Business School, France
Pii-Tuulia Nikula, Eastern Institute of Technology, New Zealand
Stefanie Beninger, Nyenrode Business Universiteit, the Netherlands

Degrowth, Post-Growth, and Equitable Growth: Unsustainable Marketing Practices at the End of a Quarter Century
Alberto Henriques de Araújo Pereira
Renata Andreoni Barboza

Enriching Marketing Education with Non-Growth Centric Approaches: A Pilot Study
Annette Hoxtell

Scarcity, limits, and degrowth: which way forward?
Kristoffer Wilén

Designing healthcare ecosystems, innovation in life sciences and market access principles for a more sustainable, efficient and inclusive health future.
Track Chair:
Frédéric Jallat, ESCP Business School, France

An anticipated dystopia. Responsibilization and obesity in the Ozempic era
Clara Freire Filgueiras Faro
Eliane Pereira Zamith Brito
Isabela Carvalho de Morais

Bridging the Gap: Addressing Women's Health and the Role of FemTech
Kim Brunel
Frédéric Jallat

Information asymmetry in the healthcare sector – Assessing its harmful effects and exploring potential strategies for mitigation
Regina Alvarado Mujica
Frédéric Jallat

Ethics, Equity and Social Justice
Track Chairs:
Cathy McGouran, University of Liverpool, United Kingdom
Ann-Marie Kennedy, University of Canterbury, New Zealand
Nicky Santos, Creighton University, United States

Corporate Social Irresponsibility in Sports Mega-Events: A Systematic Literature Review and Avenues for Future Research
Reynald Brion
Renan Petersen-Wagner
Mariana Bassi-Suter

Dark Sides of Financial Inclusion: Examining the Buy Now, Pay Later (BNPL) Industry through the Lens of the Integrative Justice Model (IJM)
Neleen Leslie Piper
Ficawoyi Donou-Adonsou
Tina Facca-Miess

Faith-Consistent Investing and Transformative Justice: Evaluating Mensuram Bonam through the Integrative Justice Model
Tina Facca-Miess
Nicholas Santos
Dominic Chai

From Attachment to Aversion: Consumers' Perspectives on Consumer-Brand Relationship Deterioration
Julio Cesar Leandro

Delane Botelho

Racism at the Point of Sale and Its Impact on the Shopping Experience of Black Consumers in São Paulo, Brazil
Denise Pereira dos Santos
Patricia Santos
Jéssica Marinzeck
Isabella Cacace Gomes
Ricardo Zagallo Camargo
Roberta Dias Campos

Globalisation, (Neo)Colonialism, and Marketing
Track Chairs:
Olga Kravets, Royal Holloway, University of London, United Kingdom
Marcus Wilcox Hemais, Pontifical Catholic University of Rio de Janeiro, Brazil

"Lutar, construir, reforma agrária popular": decolonial analysis of the convergence between the Landless Workers' Movement with the traditional food market
Pilar Petrasi Guahnon Fleck
Marcelo Jacques Fonseca
Marcus Wilcox Hemais

Consumption, perceptions and expectations: a comparative analysis of Brazilian national teams fans
Ana Cristina Picinin de Rezende Costa

Low-Resource Entrepreneurship and Global Competition Asymmetry: A Theoretical Reflection on the Effects of the Mercosur-European Union Agreement on the Dynamics of Subsistence Markets in South America from a Post-Abyssal Analysis
Camila Braga Soares Pinto
Thiago Gomes de Almeida
Tatiana Dornelas de Oliveira Mendes
Cristina Sayuri Côrtes Ouchi Dusi
Giovani Peterson Alves mendes
Giovana Pedrette
Victoria Santos
Luiza Crispin Murta

Persistence against The New Means of Consumption in Japan
Masaaki Takemura

Reflexive Decoloniality Means Boycotting the Myth of a Balanced Globalization System: Unsilencing the Indigenous Past of a Free People's Republic (1791-1825)
Jonathan Bowman
June Francis

Reinforcement of Whiteness by Virtual Influencers: A critical study in marketing, using semiotics, about Lu da Magalu
Lucas Costa Lima
Marcus Wilcox Hemais
Luís Alexandre Grubits de Paula Pessôa

Vernacularization: Exoticism or Empowerment?
Saurabh Shinde
Krishanu Rakshit

Healthcare Marketing: Challenges and Opportunities in a Global Landscape
Track Chairs:
Mark Peterson, University of Wyoming, United States
Jeff Wang, Monash University, Australia

Macromarketing of Services for Family Caregivers
Mark Peterson
Jeff Wang

Psychological factors in vaccine hesitancy behaviors of parents and caregivers regarding HPV vaccines in children and adolescents: a systematic literature review and implications for social marketing
Caroline Graebin
Kavita Miadaira Hamza

Historical Research in Marketing
Track Chairs:
Francisco Conejo, INCAE Business School, La Garita, Costa Rica
Oksana Domina, University of Helsinki, Finland and Taras Shevchenko University of Kyiv, Ukraine
Jayne Krisjanous, Te Herenga Waka – Victoria University of Wellington, New Zealand
Terrence H. Witkowski, California State University, Long Beach, United States

A Visual Analysis of 1900-1936 Japanese Beer Posters – A Window Into The Intersection of Art, Tradition, Culture And Commerce in Contested Consumerist Pre-WW II Japan
Hieu Nguyen

Commercial Education and Its Influence on the Formation of the Marketing Discipline in Brazil: A H istorical Analysis from the Perspective of Macromarketing
Marta Cristina Nunes Cruz Fleming
João Felipe Sauerbronn

Dematerialization of Marketing Objects: A Narrative of Marketing History's Future
Alberto Henriques de Araújo Pereira
Renata Andreoni Barboza

Revisiting the Resource-Advantage Theory: Incorporating Wroe Alderson's Insights and Service-Dominant Logic
Noriaki Saito; Masato Shoji
Kazuo Kikuchi

Latin American Perspectives in Macromarketing: Theories, Contexts, and Transformations
Track Chairs:
Isabela Morais, Federal University of Ouro Preto, Brazil
Jaqueline Pels, Universidad Torcuato Di Tella, Argentina
Marlon Dalmoro, Federal University of Rio Grande do Sul, Brazil

Beyond Competition: Complementary Institutional Logics in the Globalization of Soccer Markets
José Sarkis Arakelian
Eliane Pereira Zamith Brito
Isabela Carvalho de Morais

Consuming Otherness: the anthropophage in marketing
Victoria Rodner
Chloe Preece

Expanding the Concept of Entrepreneurship as a Boundary Object: Space and Community in Low-Resource entrepreneurship fairs in Latin America
Thiago Gomes de Almeida
Camila Braga Soares Pinto
Tatiana Dornelas de Oliveira Mendes
Cristina Sayuri Côrtes Ouchi Dusi
Giovani Peterson Alves Mendes
Giovana Pedrette
Victoria Santos
Luiza Crispin Murta

Opportunity and Exclusion: Recognition of Exclusion as a Trigger for Low-Resource Entrepreneurship in the Global South
Thiago Gomes de Almeida
Tatiana Dornelas de Oliveira Mendes
Cristina Sayuri Côrtes Ouchi Dusi
Camila Braga Soares Pinto
Giovana Pedrette
Giovani Peterson Alves Mendes
Victoria dos Santos
Luiza Crispim Murta Machado

Postcolonial Conditions Enabling Consumers' Collective Political Agency in Latin America
Marlon Dalmoro

Profane-Sacred Duality in Public Goods: Consumers Sacralised a Culturally Ingrained Consumption Practice
Elisa Priori de Deus
Leticia Moreira Casotti
Ana Raquel Coeho Rocha

Queer Theory and Decolonialism: a discussion on deepening the understanding of the queer individual when viewed through a decolonial lens
Beatriz Gloria Hossmann

Systematic Literature Review: Place Branding in the Brazilian Context
Juliana Turano
Alessandra Baiocchi

The human-animal relationship through the perspective of Brazilian homes: a proposal for tropicalization of the measurement strategy.
Pedro Paulo Santos Cavalcante
Evandro Luiz Lopes
Eduardo Mesquita

Unpaid Care work: Resisting affectively through the 'ethics of care'
Adriana Guedes Arcuri
Tânia Modesto Veludo de Oliveira
Gretchen Larsen

Value dynamics in collective mega-events
Jannsen Santana
Daiane Scaraboto
Flavia Cardoso

Macro Approaches on Markets, Organizations and Digitization

Track Chairs:
Fernando Ressetti Pinheiro Marques Vianna, Universidade Tecnológica Federal do Paraná, Brazil
Renata Couto de Oliveira, Universidade do Grande Rio, Brazil

Evolution of public administration: from the theory of bureaucracy to digital transformation
Moacir Santana de Almeida
Ana Carolina Gouvêa Dantas Motta

Narratives of Belonging: Exploring #BookTokBrasil as a Digital Consumer Community
Thaysa Costa do Nascimento
Isabela Carvalho de Morais
Beatriz de Lourdes Santos Pereira

Macromarketing Methods and Measurement

Track Chairs:
Ben Wooliscroft, Auckland University of Technology, New Zealand
Francisco Conejo, INCAE Business School, La Garita, Costa Rica
Anthony Samuel, Cardiff University, United Kingdom

Exploring open-ended survey answers in (macro-)marketing research: Seeking Societal Insights
Alexandra Ganglmair-Wooliscroft

How to update Aldersonian methodology? Towards a solution to "micro-macro link issue"
Yoji Matsuo
Kazuo Kikuchi
Hanseob Yeo

Sports Fandom as a Marketing System: Examining Group Identity, Reciprocity, and Market Externalities from a Macromarketing Perspective
Ken Sumida
Takayuki Kubota
Akihiko Taniguchi

Understanding markets and marketing from a non-Western perspective
Masoud Karami
Ben Wooliscroft

Macromarketing Pedagogy

Track Chairs:
Julie V. Stanton, Penn State University, United States
Stanley J. Shapiro, Simon Fraser University, Canada
Forrest Watson, Dickinson College, United States

A Sociocultural Praxis Framework for Transforming Marketing Education
Chahna Gonsalves
Lucy-Gill Simmen
Teresa Pereira Heath
Sarah Montano
Nicki Newman
Laura Chamberlain

GenAI Literacy & the New Product Development Process in the Classroom
Maya Kumar
Julie Stanton
Forrest Watson
Alex Reppel
Stefanie Beninger

Harnessing and Taming AI for the Classroom
Mark Peterson

Unconstructiveness: The Ethics of Academic Commenting
Pia Polsa
Taija Townsend

Marketing Systems from the Global South
Track Chair:
Sujit Raghunathrao Jagadale, Indian Institute of Management Amritsar, India

A Multilevel Analysis of the Reverse Logistics Marketing System Using the Provisioning **Systems Approach**
Anne Zehoul
Marcus Hemais

Meaningful Consumption Systems
Track Chair:
Amy Errmann, Auckland University of Technology, New Zealand

Sacred Choices Amid Profane Systems: Autonomy in Pre-Mortem End-of-Life Planning
Amy Errmann

Why do we give human names to pets? A study on the anthropomorphism process of pets
Pedro Paulo Santos Cavalcante
Evandro Luiz Lopes
Eduardo Mesquita

Moving beyond the 'stigma turbine'? Contributions from macromarketing
Track Chair:
Himadri Roy Chaudhuri, Xavier Institute of Management, India

Advertising as Institutional Work: The Case of Casteless Collective in India
Bhupesh Manoharan
Vipin Sreekumar
Akshay Narayanan
Krishanu Rakshit

Betting on Knowledge: Framing Sports Gambling as a Legitimate Behavior
Gabriela Nogueira Rauber
Daniela Zacarchenco Paredes
José Sarkis Arakelian
Lilian Soares Pereira Carvalho
Eliane Pereira Zamith Brito

Colorism in India: Emerging Counternarratives
Saurabh Shinde
Krishanu Rakshit

Secondhand Luxury: De-stigmatization Through Negotiation
Jie Fowler
Mengxi Gao

Poverty and consumption

Track Chairs:
Caroline Moraes, University of Birmingham, United Kingdom
Morven G. McEachern, University of Chester, United Kingdom
Deirdre O'Loughlin, University of Limerick, Ireland

Addressing poverty in Brazil through socially responsible marketing: a research agenda proposal
Guilherme Torres
Ana Carolina Vitor
Ramon Silva Leite

Investigating Take-Up Discrepancy in the Healthy Start Scheme: A Machine Learning Approach
Kuzivakwashe Makokoro
Gavin Long
John Harvey
Andrew Smith
Simon Welham
Evgeniya Lukinova
Roberto Mansilla
James Goulding

Quality of Life and Wellbeing

Track Chairs:
Alexandra Ganglmair-Wooliscroft, Massey University Auckland, New Zealand
Ahmet Ekici, Bilkent University, Turkey

Beyond Age: Technology, Identity, and the 60+ Consumer
Daniel Probaos Crisafulli
Eliane Pereira Zamith Brito

Clara Freire Filgueiras Faro
Daniela Zacarchenco Paredes

Gifted Bonds and Projects: Their Influence on Wellbeing and Quality of Life
Carolina Redolfi
Suzane Strehlau

Race, Racism and Marketplace Inequities and Resistance
Track Chairs:
June Francis, Simon Fraser University, Canada
Ana Raquel Rocha, Universidade Federal Fluminense, Brazil
Denise Franca Barros, Universidade Federal Fluminense and Universidade Estácio de Sá
Flavia Luzia Oliveira da Cunha Galindo, Universidade Federal Rural do Rio de Janeiro, Brazil

Balancing Traditions with Modernity: How Indian Women Practice Karwa Chauth
Geetakshi Girotra
Mahsa Ghaffari

Becoming the black body: how affective atmospheres drive empowerment practices in Brazilian black activism
Vanessa Arcoverde
Flavia Zimmerle
Miriam Leite Farias
Bianca Ferreira Silva

Moralities of Self-Tracking in Sports and Fitness: A CRT Perspective on Dominant Narratives
Federico Garcia Baena
Miriam Leite Farias

Race, Representation and Reality in UK Higher Education: Narratives from a London Business School
La Toya Quamina
Yasmin Kulasi
Kate Ingsa
Unvan Atas

Scams, Scammers, and (Macro)marketing
Track Chairs:
Olga Kravets, University of London, United Kingdom
Benjamin Rosenthal, Fundação Getulio Vargas, Brazil
Victoria Rodner, University of Edinburgh, United Kingdom

Infoproducts: Beware of the Scam!
Livia Rizzuto Gallo

Benjamin Rosenthal

Social Conflict, Marketing and Well-Being

Track Chairs:
Cliff Shultz, Loyola University Chicago, United States
Andrés Barrios, Universidad de Los Andes, Colombia

Civil Society Constructive Engagement for Peacebuilding: "The Third Agreement" Coffee Brand
Héctor Erlendi Godoy Hernández
Andres Barrios

Comparing developments in market and transitional economies - Introducing a periodization analysis to examine two contrasting country cases
Oksana Domina
Alla Starostina
Petteri Repo

Entrepreneurship for Peace in Post-Conflict Colombia: Social, Female, and Ex-Combatant Entrepreneurship in Chocó and Montes de María
Ulf Thoene
Roberto García
James Pérez

Exploring Strength-based Approaches for Social Conflict Resolution: Hedonic Consumption Practices and Well-being Among Syrian Refugees in Türkiye
Zeynep Baktir
Ahmet Ekici

How cognitive strategies and decision-making processes support the leader's ability to identify and respond to unpredictable events through the interaction of effectuation and bricolage logic. - Nigerian case studies
Lorenzo Coronati
Frédéric Jallat

Macromarketing systems and social conflict in South America
Cristian Sepulveda
Mark Peterson

Microfranchises for war victims and victimizers' social and economic (re)integration
Andres Barrios
Adriano Cano-Cuervo

Towards Market Inclusion and Social Flourishing in Post-Al Assad Syria
Forrest Watson
Gökçe Balaban

Ziad Alahmad

Unlocking the Growth Potential for Women-led Lebanese MSMEs: The Role of Society, Institutions, and Support Systems
Hossein Eslami

Society, Politics, and Branding: Macromarketing Views on Activism
Track Chairs:
Christian Koch, Kristianstad University, Sweden
Antonella Cammarota, UnitelmaSapienza Rome, Italy

"Nett Hier!" But have you ever seen what stickers in tourist destinations are saying? – An Exploratory Analysis
Giovanni Baldi

Corporate Activism: A Measurement Proposal
Luiza Dazzi Braga
Matheus G. Tardin
Marcelo G. Perin

From Ethics to Influence: The Rise of Corporate Moral Authority in Social Advocacy
Giuliana Isabella
Carlos Eduardo Lourenco
Nathalia Mello
Lucia Barros
Cristiane Pizzutti

How Social Media Influencers and Audiences Co-Create Online Brand Crises
Benjamin Rosenthal
Ana Mott

Losing Confidence in Global Supply Chains: The Exploitation of Tariffs in a New Era of Isolationism
Omar J. Khan

Reversing the Tide: Corporate DEI Rollbacks in Response to Cultural Backlash
Francesca Avallone
Antonella Cammarota

The Impact of Corporate Sacrifice on Perceived Moral Authority and Authenticity in Brand Activism
Lucia Barros
Cristiane Pizzutti
Nathalia Mello
Giuliana Isabella
Paulo de Paula Baptista

Marcos Severo de Almeida

Travel Proud or Just Hotels? Examining the Destination-Level Impact of Inclusivity Badges
Mario D'Arco
Giovanni Baldi

Sustainability and Climate Action

Track Chairs:
Sabrina Helm, University of Arizona, United States
Joya Kemper, University of Canterbury, New Zealand
Vicki Little, RMIT Vietnam, Vietnam

Second-Hand Clothing Consumption and Circular Economy
Aline Souza Magalhães
Isabela Carvalho de Morais
Karin Brondino-Pompeo

The "Do-Bem" effect - Deconstructing the influence of sustainability claims on food healthiness perceptions
Ana Beatriz Aquino
Anuja Bhattacharjya
Lucia Barros

Violence, Markets and Marketing

Track Chairs:
Maíra Magalhães Lopes, Royal Holloway, University of London, United Kingdom
Luciana Velloso, Goldsmiths, University of London, United Kingdom
Rohit Varman, University of Birmingham, United Kingdom

Cancel Culture as Digital Marketplace Violence: Consumer Activism, Corporate Strategies, and the Paradox of Resistance
Najla Shariff Omar Al-Baiti
Carolina Redolfi

Consumers' enjoyment as social symptoms of corporate violence and the foreclosure of politics of change
Renata Couto de Azevedo de Oliveira
Eduardo André Teixeira Ayrosa

Firearms as Cultural Objects
Benjamin Rosenthal
Massimo Airoldi

Understanding Doing Difference and Performativity: A Critique and Guide for Marketing Studies

Yuri Marcel Dallabrida
Delane Botelho

"Cooperate To Win Together": A Scientometric Review of Prosumers on Cooperative Platforms

Alexandre Borba da Silveira

Arnaldo Rizzardo Filho

Jefferson Marlon Monticelli

Abstract

Introduction

Digital platforms serve as a conduit for interactions between users, producers, and consumers (e.g., prosumers), in addition to facilitating interactions with other elements. A prosumer is defined as an individual who engages in both consumption and production activities. Thus, this study expands the discussion surrounding the role of prosumers and digital platforms is further complicated by the emergence of cooperative models that facilitate the participation of autonomous consumer producers through co-creation, co-ownership, and democratic processes.

Research Problem and Objective

How are these phenomena being explored, mapped, and analyzed by marketing management researchers? Aligned with the co-evolutionary perspective by Busca and Bertrandias (2020), this article aims to explore the co-evolution of studies that focus on the themes of prosumers, platform cooperatives, and prosumption, employing a scientometric approach to retrospectively review the application of concepts in studies marketing management and outline a research agenda.

Theoretical framework

The consumers and producers' relationship are a crucial aspect of various industries, particularly in service-oriented sectors such as hospitality, housing, mobility, ridesourcing, and retail. In this way, face-to-face interpersonal interaction (offline model) migrates to the internet-mediated online sphere through digital technologies, such as collaborative, cooperative, and sharing economy platforms. Thus, these platforms allow consumers to actively engage in co-production, content creation, and data provision, activities previously restricted to traditional producers and workers.

Discussion

The study mitigates biases stemming from authors' preferences or the sources they applied using quantitative criteria to select publications and analyze citations and interconnections. We compiled data from the Web of Science, Scopus, and Science Direct databases to create an article list. The scientometric approach and network methodology were then employed to trace the evolution of digital consumption behavior by platform cooperativism. Our findings present a growing number of publications in the areas of business and social sciences with open gaps for future marketing and consumer research.

Conclusion

This study provided the first overview of academic research on prosumer management, cooperative platforms, and prosumption between 2014 and 2024. Results generated from the Scopus, WOS, and Science Direct databases mapped, presented, and analyzed new avenues of study. In terms of thematic trends, our study analyzed the co-evolution of studies to expand the debate on the interrelationship between consumers, producers, and cooperative digital platforms in prosumption behavior. Finally, we present research questions to be investigated by marketing and consumer researchers.

Contribution

The study offers a historical overview of prosumer and prosumption action in cooperative platforms research, enabling researchers to position their studies within this evolving framework. The research expands the existing body of literature by documenting the co-evolution digital cooperativism studies and the digital consumption behavior approach. Additionally, a research agenda is proposed to advance the theoretical framework for constructing digital consumption behavior theories linked with digital cooperative platforms, offering a scientometric perspective.

Keywords: Prosumers, Cooperative Platforms, Prosumption Behavior.

Introduction

In recent years, several business models have been developed based on the principle of *homo economicus*, which portrays human beings as selfish, consistently rational agents who seek to maximize the utility and use of products and services (Anthony 2024). In contrast, new movements based on collective, collaborative, and cooperative initiatives

challenge the assumptions underlying such business models (Wegner et al. 2023). Furthermore, technological advancement through business supported by digital platforms has engendered different ways of living, producing, and consuming (Atanasova et al. 2024, Bajde et al. 2024, Belk 2014, Carrión 2022, Eckhardt et al. 2019, Ertz 2020, Paredes 2023, Wegner et al. 2023).

From this perspective, the extant literature on marketing and management defines digital platforms (DP) as external systems based on technology, executable by software on several sides, offered as applications, solutions, or systems for end-users (Reuver et al. 2018). Eckhardt (2019) defines digital platforms (DP) as both visible and invisible solutions that include websites, blogs, virtual messaging networks, mobile applications, and social networks of texts, content, images, and videos. These platforms facilitate rapid access, sharing, and collaboration of information, content, products, and services (Bardhi and Eckhardt 2012). Moreover, platforms facilitate connections, mediation, influence, and the flattening of sharing and collaborative actions, engendering psychological and utilitarian meanings in the consumer-platform-producer relationship (Atanasova et al. 2024, Bajde et al. 2024, Basili and Rossi 2020, Culiberg et al. 2023).

Digital platforms serve as a conduit for interactions between users, producers, and consumers (e.g., prosumers), in addition to facilitating interactions with other elements (Da Silveira et al. 2023). A prosumer is defined as an individual who engages in both consumption and production activities (Busca and Bertrandias 2020). They engage in the production of products, services, and experiences for their own use and/or for their group, community, and/or tribe (Ferraz et al. 2021). Prosumers have the potential to address unmet market needs that traditional organizations have overlooked (Ertz, Maravilla and Cao 2025). For example, prosumers may begin to produce a product or service that is not currently available on the market (Eckhardt 2019). Their ideas or goods may then disseminate within and beyond the community though digital platforms, as evidenced by the rise of Airbnb and Fairbnb (Ghirlanda and Kirov 2024, Wegner et al. 2023).

Expanding the Concept of Entrepreneurship this debate, the discussion surrounding the role of prosumers and digital platforms is further complicated by the emergence of

cooperative models that facilitate the participation of autonomous consumer producers through co-creation, co-ownership, and democratic processes (Dalmoro et al. 2023). In this context, platform cooperativism presents itself as a fairer, more supportive, equitable, beneficial, democratic, and cooperative alternative to the models controlled by algorithms of the world's major technology companies (e.g., Meta, Uber, Google) (Wegner et al. 2023). The term "*platform cooperativism*" is used to describe platforms whose governance structure is open to a broader group of stakeholders, including cooperative members who may be users, consumers, providers, administrators, or collaborators (Da Silveira et al. 2023b). Therefore, the cooperative platform model incorporates aspects of networks, communities, and markets, arranged in a hybrid format between capital and social support, with the relationships and experiences of users (prosumers) serving as the foundation (Anglada 2020, Carrión 2022, Ghirlanda and Kirov 2024, Scholz 2016).

Moreover, it is primarily the responsibility of prosumers to facilitate interactions with consumers, as digital platforms engage minimally in service activities (Xiang et al. 2022). Nevertheless, digital platforms facilitate consumption interactions through the utilization of mechanisms, data and algorithms that encourage the phenomenon of prosumption, defined as consumption behavior between consumers and producers (Ferraz et al. 2021). Consequently, prosumers bear significant responsibility for providing services and managing their properties independently within traditional, collaborative, or cooperative digital consumption contexts (Busca and Bertrandias 2020). These phenomena raise a practical question: How are these phenomena being explored, mapped, and analyzed by marketing management researchers?

Aligned with the co-evolutionary perspective by Busca and Bertrandias (2020), this article aims to explore the co-evolution of studies that focus on the themes of prosumers, platform cooperatives and prosumption, employing a scientometric approach to retrospectively review the application of concepts in studies marketing management and outline a research agenda.

This study sheds light on the interconnections between prosumers, platform cooperatives, prosumption in digital consumption behavior by employing cross-sectional data and scientometric analyses. The study mitigates biases stemming from authors' preferences or the sources they applied using quantitative criteria to select publications and analyze

citations and interconnections. We compiled data from the Web of Science, Scopus, and Science Direct databases to create an article list. The scientometric approach and network methodology were then employed to trace the evolution of digital consumption behavior by platform cooperativism (Busca and Bertrandias 2020, Ghirlanda and Kirov 2024). Our results showed the burgeoning number of publications over the years through their annual evolution, depicting concerns related to how prosumer relations and consumption occur in cooperative platforms such as energy services, urban mobility services, and agroecological products.

The study offers a historical overview of prosumer and prosumption action in cooperative platforms research, enabling researchers to position their studies within this evolving framework. The research expands the existing body of literature by documenting the co-evolution digital cooperativism studies and the digital consumption behavior approach (Wegner et al. 2023). Additionally, a research agenda is proposed to advance the theoretical framework for constructing digital consumption behavior theories linked with digital cooperative platforms, offering a scientometric perspective (Gough et al. 2020, Vasconcellos et al. 2024) as a guiding principle for future research in marketing and consumer behavior field.

Theoretical Foundation

Revisiting Consumers, Producers, Cooperative platforms in Prosumption Behavior

The consumers and producers' relationship are a crucial aspect of various industries, particularly in service-oriented sectors such as hospitality, housing, mobility, ride sourcing, and retail (Bajde et al. 2024). In this way, face-to-face interpersonal interaction (offline model) migrates to the internet-mediated online sphere through digital technologies, such as collaborative and sharing economy platforms (Da Silveira et al. 2023). Thus, these platforms allow consumers to actively engage in co-production, content creation and data provision, activities previously restricted to traditional producers and workers (Wegner et al. 2023).

From this perspective, digital platforms, with their investments in capital and constant and variable technology, capture and analyze these traces (interactions through data), transforming them into marketable products and services (Ferraz et al. 2021). In this way, the generated data packages can be sold to companies that use them to influence production processes, direct promotional content, share usage behaviors, among other purposes (Basili and Rossi 2020). Thus, digital platforms connect, promote, influence, and mediate virtual

communities, providing a space for interaction between consumers and producers who share common interests in a product, content, or service (Martin et al. 2017, Paredes 2023).

To Busca and Bertrandias (2020), prosumption is the blurring of the traditional boundaries between producers and consumers, where individuals not only consume goods and services but also actively participate in their production or co-creation. In prosumption, consumers take on a more active role in the creation, design, manufacturing, or distribution of products or services, often enabled by digital technologies and platforms (Belk 2014, Eckhardt 2019, Ferraz et al. 2021). This phenomenon signifies a shift towards a more collaborative and participatory economy where individuals contribute their labor, intellectual capital, or physical assets to the production process, challenging the traditional producer-consumer dichotomy (Culiberg et al. 2023).

However, there are still some gaps in understanding how cooperative platforms fit into this prosumption dynamic, in contrast to traditional market platform models (Da Silveira et al. 2022, Perren et al. 2019). Although the model of cooperative platforms is supported by the rights of co-ownership, co-production, co-participation, co-creation, co-valuation, and with mutual benefits (Ghirlanda and Kirov 2024); there is a lack of solidity regarding the understanding of choice regarding the same product or service offered by a traditional marketplace platform (Da Silveira et al. 2023b, Dalmoro et al. 2023). The consumption interactions (prosumption) between prosumers in platform cooperatives provide an environment conducive to fair, democratic, and equitable collaboration (Atanasova et al. 2024, Busca and Bertrandias 2020, Paredes 2023).

In the cooperative model, prosumers (consumers and producers) seek to develop a fair co-creation of value (Busca and Bertrandias 2020). This is achieved by allowing them to become co-owners of the business, thereby enabling them to directly participate in value creation activities and to benefit from them (Anthony 2024). This phenomenon is in line with the consumer empowerment discourse (Labrecque et al. 2013). Thus, cooperatives are not organized by a collaborative culture: their management is more structured and formalized than the management of *Open-Source* projects such as Wikipedia (Busca and Bertrandias 2020). Thus, digital platforms cooperatives involve their members in the outline of the strategy and assert that the power belongs to them (Carrión 2022, Ghirlanda and Kirov 2024, Papadimitropoulos 2021, Paredes 2023, Scholz 2016).

Moreover, this digital evolution between prosumers is based both on appropriation and assimilation of work and consumption (Bajde et al. 2024). It borrows collective sociotechnical imaginary that is based on specific understandings, norms, values, relationships, practices, and experiences between consumers and producers (Sörum and Fuentes 2023). Therefore, the cultural repertoire of cooperatives includes the democratic principle of one person one voice and a certain societal responsibility and ethical vision of the world insert market transactions (Boekelo and Kloppenburg 2023, Busca and Bertrandias 2020, Chen et al. 2024, Wei et al. 2021).

Further, the confluence of prosumers, cooperative platforms, and prosumption represents a significant and emerging area of interest within the marketing and consumption literature (Busca and Bertrandias 2020; Wei et al. 2021). To illustrate, an examination of the work of Busca and Bertrandias (2020), Wei et al. (2021), and Chen et al. (2024) reveals a focus on the role of prosumers in cooperative platforms, with a particular emphasis on the phenomenon of prosumption within the context of consumption behavior. This trend is spreading to new digital collective and cooperative movements making it necessary to better understand how scholars are investigating it (Atanasova et al. 2024; Ghirlanda and Kirov 2024, Wegner et al. 2023).

Methodological Procedures

This study examined academic research on prosumers and platform cooperatives related to prosumption behavior from 2014 to 2024. We selected this period due to the increasing importance of digital platforms in both academia and management, spurred by rapid digitalization, the adoption of emerging technologies, and significant shifts in production and consumption patterns over the past decade. Additionally, the term "digital cooperative platforms" began to gain traction in 2016, as introduced by Scholz in the fields of communication and marketing.

The Web of Science, Scopus and Science Direct databases were used to collect the information and provide several bibliometric indicators, including total number of publications, citations, most relevant sources, publications, authors, networks among co-authors, countries, keywords, etc. These databases were chosen for their international

recognition in thematic scope and indexing quality, together accounting for over 90% of the published articles related to this research topic.

We apply scientometrics techniques as a resource for synthesis and to promote interdisciplinarity to this review (Gough et al. 2020, Vasconcellos et al. 2024). Thus, this study also used VOSviewer to generate a co-occurrence map of the authors' map of the authors' prosumers and digital cooperative platforms-related keywords.

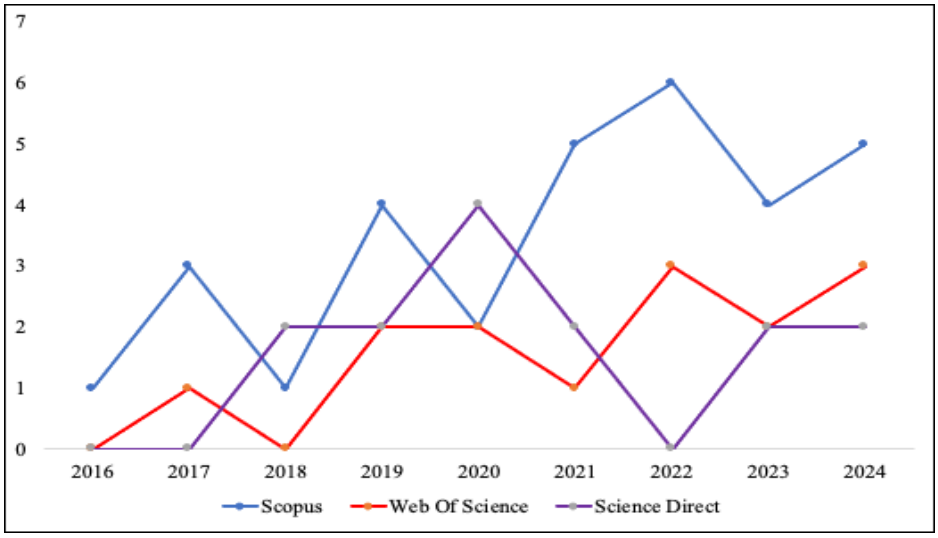
VOSviewer is a tool for creating maps based on network data, and for visualizing and exploring these maps in occurrences in scientific papers. Different aspects of the literature can be emphasized, such as institution (affiliation), journals publications, co-authors, countries, citations, and keywords (Abdullah et al. 2023, de Sousa 2021). This software uses a unified approach to both mapping and clustering, supported by the normalized term co-occurrence matrix and a similarity measure that calculates the strength of association between terms, citations, and keywords (van Eck and Waltman 2019). The VOSviewer provides a set of tools for quantitative and qualitative research in scientometrics procedures (Abdullah et al. 2023, Gough et al. 2020).

This paper conducts a bibliometric review to outline future research and examine, from a scientometric perspective, how the relationships between different prosumer approaches in management, marketing and social science studies have changed over the last decade. This study conducted the query between 17 October until 05 November 2024 to obtain the data inputs, by using the following keywords ("prosumer") AND ("cooperative platforms) OR ("prosumption") AND ("cooperative platforms"). The search in Web of Science (WOS) resulted in 14 documents from 2014 to 2024, 31 documents in Scopus and 14 more in

the Science Direct database, for a total of 59 documents. Figure 1 illustrates this selection from database x publishes per year.

Figure 1

Database x Number of Articles x Publication Per Year



Source: data research

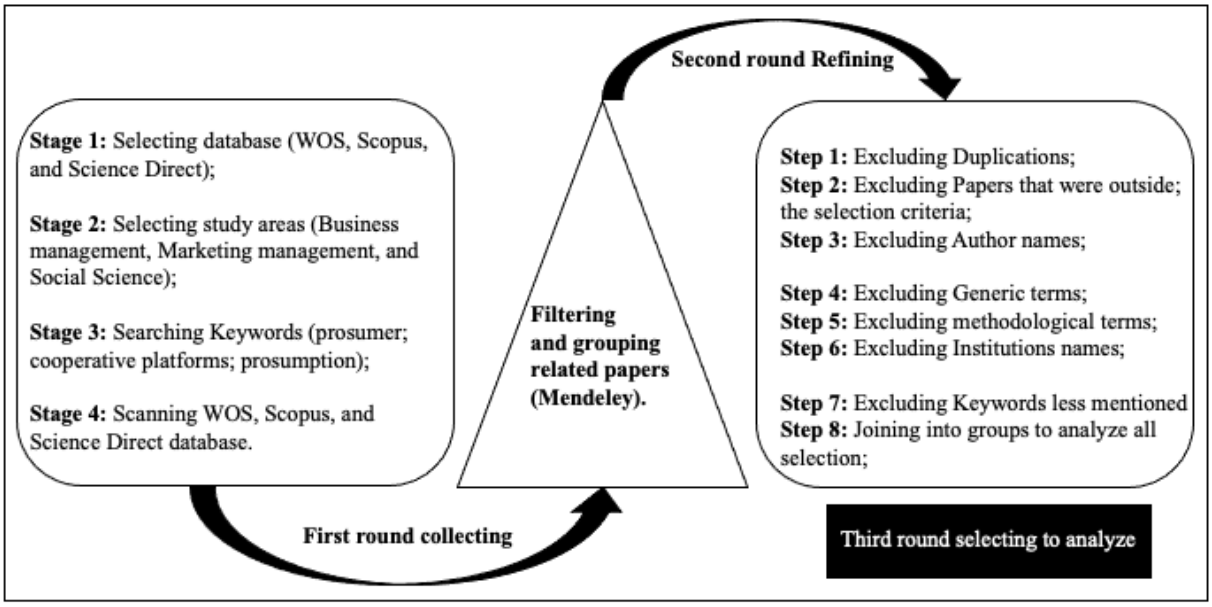
We followed the recommendation of Webster and Watson (2002) and excluded conference articles, dissertations, book reviews, books, and case studies since they may follow weaker criteria for the review process than peer-reviewed articles. In this scenario, we chose to analyze only articles published in journals, excluding conference papers, abstracts, editorials, reviews, and working papers.

After extracting the data, we imported all the bases into the Mendeley application, where we excluded 5 duplicate articles and, in a final analysis, another 26 were removed because they were articles that did not meet the selection and refinement criteria. In the end,

28 publications ere valid for the current study, of which 13 (46,43%) were in Scopus, 11 (39,29%) in WOS, and 4 (14,28%) in Science Direct.

Figure 2

Research Design



Source: Process carried out by the authors

Figure 2 shows how we operationalize our research. We divide the process into three rounds: collecting articles, refining them, and clustering in the keywords. Finally, we focus on a unique database that combines all 3 databases (WOS, Scopus, Science Direct) into 28 valid articles. The scientometric analysis per se was based on three primary cluster analyses carried out using VosViewer software and the Microsoft Excel tool (Gough et al. 2020, Vasconcellos et al. 2024).

Results And Analysis

The initial search was refined into publications from 2014 to 2024, which resulted in 59 documents (articles in English and Spanish language). The 28 most relevant publications were analysed by excel and VOSviewer tools. As can be seen, the contributions to publications increased significantly after 2020, most likely due to the previously mentioned theoretical basis of the cooperative platform field. Furthermore, it is quantified that digital cooperative platforms started an alternative business model in 2019 and amplified the marketing context by introducing new methods to promote, offer, inform, engage, sell to, learn about, and serve customers and producer in prosumption context (Parra-Dominguez,

Sanchez and Ordonez 2023).

To facilitate the analyzes of the obtained results, they were separated into the following sections: papers by research field selection (table 1), ranking of articles by citation, journals publications, countries, keywords, terms occurrences, and future trends.

Table 1

Published Papers x Research Field

Research Field	Count	Percentage
Business, Management and Accounting	9	32,14%
Social Sciences	12	42,86%
Economics and Finance	3	10,71%
Environmental Science	2	7,14%
Urban and Regional Studies	2	7,14%
Total	28	100%

Source: data research

Table 1 lists these 5-research field that we select the paper to this analyze. More than 75% these documents are positioned in the field of business and social sciences. The rest were positioned in other areas after a second refinement following selection, filtering, and rounds of analysis. In the second stage, we started with all the refined papers (28) analyzing their citations, authors, and journals. The second table lists these 22 most-cited journals (more than one citation), together accounting for 78,6% with 984 citations listed and indexed on Scopus, WOS, and Science Direct.

Table 2

Papers list x Cited Ranking

Ranking	Article Title	Authors	Year	Cited by
1	Ridesourcing, the sharing economy, and the future of cities.	Jin, S. T., Kong, H., Wu, R., and Sui, D. Z.	2018	404
2	Democratising platform governance	Martin, C. J., Upham, P., and Klapper, R.	2017	145

	in the sharing economy: An analytical framework and initial empirical insights.			
3	Matching supply and demand in a sharing economy: Classification, computational complexity, and application.	Boysen, N., Briskorn, D., and Schwerdfeger, S.	2019	72
4	A Framework for Digital Marketing Research: Investigating the Four Cultural Eras of Digital Marketing.	Busca, L., and Bertrandias, L.	2020	60
5	Keep it green, simple, and socially fair: A choice experiment on prosumers' preferences for peer-to-peer electricity trading in the Netherlands.	Georgarakis, E., Bauwens, T., Pronk, A. M., and AlSkaif, T.	2021	51
6	Is the Resource Man coming home? Engaging with an energy monitoring platform to foster	Verkade, N., and Höffken, J.	2017	44

	flexible energy consumption in the Netherlands.			
7	From co-consumption to co-production: A systematic review and research synthesis of collaborative consumption practices.	Wei, X., Lo, Chris. K. Y., Jung, S., and Choi, T.-M.	2021	37
8	Agroecology prosumption: The role of CSA networks.	Espelt, R.	2020	34
9	Recovering Food Commons in Post Industrial Europe: Cooperation Networks in Organic Food Provisioning in Catalonia and Norway.	Mestres, S. G., and Lien, M. E.	2017	29
10	One for all and all for one? The bliss and torment in communal entrepreneurship.	Boyaval, M., andd Herbert, M.	2018	28
11	Vampires in the Technological Mist: The Sharing Economy, Employment and the Quest for Economic Justice and Fairness in	Goldkind, L., and McNutt, J. G.	2019	18

	a Digital Future.			
12	Trust and sharing in online environments: A comparative study of different groups of Norwegian car sharers.	Julsrud, T. E., and Uteng, T. P.	2021	11
13	Nested markets in marginal areas: Weak prosumers and strong food chains.	Osti, G., and Carrosio, G.	2020	10
14	Puritan peers or egoistic entrepreneurs? Moral decay in lateral exchange markets.	Perren, R., Stewart, K., and Satornino, C. B.	2019	9
15	The Role of Consumers in Business Model Innovations for a Sustainable Circular Bioeconomy.	Lang, S., Minnucci, G., Mueller, M., and Schlaile, M. P.	2023	7
16	Processes of normative regulation in spaces of “solidarity economy”: a comparative case study analysis.	Esteves, A. M.	2022	5
17	Energy platforms and the future of energy	Boekelo, M., and Kloppenburg, S.	2023	4

	citizenship.			
18	Optimal Pricing and Quality Decisions Under Cooperative Promotion of Cross-Market Service Platforms.	Yan, K., Hua, G. W., Cheng, T. C. E., Choi, T. M., Dong, J. X., and Li, X. Z.	2023	4
19	Second degree cooperativism and ICT adoption.	Moral, A. M., Jurado, E. B., Uclés, D. F., Viruel, M. J. M., and Poyatos, R. P.	2020	3
20	Deconstructing the "peer-to-peer sharing economy": The challenge of the collaborative economy to platform co-operatives in the post-labor age of the 21st Century.	Carrión, J. R. H.	2022	2
21	The political work of food delivery: consumer co-operative systems and women's labor in "relationless" Japan.	Paredes, A.	2023	2
22	Prosumption through advergames: leveraging on advergame format and reward elements	Sarkar, J. G., Sarkar, A., and Sreejesh, S.	2022	2

	to create a sacred brand.			
23	Cultural commons as a key for bottom-linked policies. An exploration of the support for public and community partnerships in Barcelona.	Anglada, S. E.	2022	1
24	A networking view of collaborative consumption on social media: integrating value-in-exchange and value-in-use into value co-creation.	Chen, F. W., Zhang, L., Tsai, F. S., and Wang, B.	2024	1
25	A Lower North Shore Story: containers for feminist place-making in Québec, Canada.	Doonan, N.	2020	1
26	An alternative organizational model for a more democratic and equitable digital economy: A systematic literature review on platform cooperativism through the lens of stakeholder theory.	Ghirlanda, P., and Kirov, V.	2024	1

	Competitive advantages and challenges.			
27	Citizen-led decentralised energy futures: Emerging rationales of energy system organisation.	Wieczorek, A. J., Rohracher, H., Bauknecht, D., Kubeczko, K., Bolwig, S., Valkering, P., Belhomme, R., and Maggiore, S.	2024	1
28	Decentralized AIoT based intelligence for sustainable energy prosumption in local energy communities: A citizen-centric prosumer approach.	Anthony, B.	2024	0

Source: data research

According to this exploratory mapping (table 2), the rapid development of digital platform technology has provided a lens to analyze consumer marketing activities in relation to consumers and producers in the sharing, collaborative, and cooperative economy. For Busca and Bertrandias (2020), there is a democratic market system based on the assertion that consumers must be empowered by digital platforms. From this perspective, there is an opportunity to analyze the process of engagement of collaborative and cooperative members in the digital consumption of products, content, and services (Jin et al. 2018, Martin et al. 2017, Wieczorek et al. 2024).

For de Souza (2021), the number of citations is more important than the number of publications because it measures a researcher's influence in their field and their impact on their peers. The number of articles measures the productivity of the researcher, while the number of citations measures the influence of the researcher among his peers in the research field (Gough et al. 2020). Thus, analysing the number of publications as a measure of the author's influence can be misinterpreted, since in some cases the author is young (at the

beginning of his career) or in the process of presenting his results, whose scientific career is in a growth phase (Abdullah et al. 2023).

Moreover, the five (5) most relevant articles with 732 citations (74,19% of total citations) seek to broaden the debate on collaborative engagement in public transport (Jin et al. 2018); the democratization of governance through collaborative and cooperative platforms (Martin et al. 2017); the combination of supply and demand through cooperative and collaborative platforms (Boysen et al. 2019); the evolution of digital marketing and consumption through platforms that present a more participatory and equitable view of consumption through platform cooperatives (Busca and Bertrandias, 2020); and finally Georgarakis et al. (2021) discuss how prosumer preferences and experiences can lead to more ecological, simple and socially fair choices through cooperative digital energy communities.

The results show that the two most prominent papers and authors in this area are Jin et al. (2018) and Martin et al. (2017), with 404 and 145 citations in their studies, respectively. In the literature, there is a consensus that the number of publications/citations is one of the most efficient indices to analyze the relevance of a particular author in a particular research area. These authors are positioned in the fields of social sciences (Jin et al. 2018) and business management (Martin et al. 2017). However, in marketing management, only the fourth paper by Busca and Bertrandias (2020) appears to be relevant to extend the debate on the topic, highlighting gaps to be discussed in journals focused on marketing and consumption behavior.

From this point of view, the six most relevant journals (top six) in terms of the number of publications are as follows (number of publications in brackets): Energy Research and Social Science (3); Sustainability (2); Cities (2); CIRIEC-Espana Revista de Economia Publica, Social y Cooperativa (2); Journal of Business Research (2), and Journal of Rural Studies (2). All these sources are peer-reviewed journals, and the results show their high quality and the confidence of authors to publish their work in these journals. If we analyze only the marketing context, we find the Journal of Interactive Marketing (h-index 126), the Journal of Consumer Marketing (h-index 117), and the European Journal of Marketing (h-index 156). According to de Souza (2021, p. 666), "studying a single journal bibliometrically creates a portrait of the journal and provides a description that offers insight beyond the superficial". Table 3 illustrates this review.

Table 3

Journals x Count Publications

Journals and Publications	Count	Percentage
Energy Research and Social Science	3	10,71%
Sustainability	2	7,14%
Cities	2	7,14%
CIRIEC-Espana Revista de Economia Publica, Social y Cooperativa	2	7,14%
Journal of Business Research	2	7,14%
Journal of Rural Studies	2	7,14%
Journal of Agricultural & Environmental Ethics	1	3,57%
Journal of Interactive Marketing	1	3,57%
Journal of Consumer Marketing	1	3,57%
Journal of Cleaner Production	1	3,57%
European Journal of Marketing	1	3,57%
European Journal of Operational Research	1	3,57%
International Journal of Sociology and Social Policy	1	3,57%
IEEE Transactions on Eengineering Management	1	3,57%
Annals of Public and Cooperative Economics	1	3,57%
Energy Policy	1	3,57%
Ethics and Social Welfare	1	3,57%
Food, Culture and Society	1	3,57%
Gender, Place and Culture.	1	3,57%
Management Decision	1	3,57%
On the W@terfront	1	3,57%
Total	28	100,00%

Source: data research

In this context, the most relevant authors in the field of marketing who try to shed light on this research plot (prosumers, digital platforms, and prosumption) are Busca and Bertrandias (2020), who have published a framework on the cultural eras

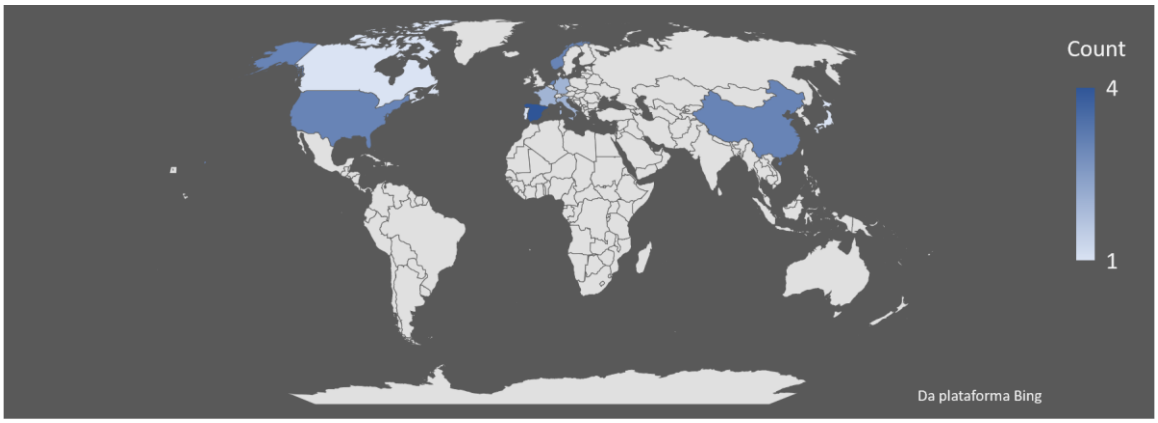
of digital marketing, to which they try to explain the evolution and impact of technologies on production and consumption actions. Busca and Bertrandias (2020), present and discuss four cultural repertoires on the Internet (collaborative systems, traditional market systems, co-creation systems and prosumption in democratic market systems). The publication on Journal of Interactive Marketing received until November 2024 (60 citations) in several other studies on digital consumer behavior, cyberculture, consumption behavior, digital marketing, and digital business transformation.

The second most cited paper in the field of marketing is by Perren et al. (2019), published in the Journal of Consumer Marketing, in which the authors criticize the role of producers and consumers through collaborative and cooperative platforms, questioning whether there is really a collective or selfish vision in digital lateral exchanges. The third most relevant article, published in the European Journal of Marketing, attempts to expose the consumption process between consumers and producers through advertisements inserted in digital games. Sarkar et al. (2022) seeks to present a vision of how collaborative relationships between consumers and producers can generate rewards for both, thus generating cooperative action for the members involved.

In terms of the scientific production of countries (Figure 3), the most important country is Spain (the darkest blue in the graph) with 4 publications. The white countries have no publications. The 8 most productive countries (total number of publications in brackets) are: Spain (4), China (3), Norway (3), the United States (3), the Netherlands (3), Italy (2), Germany (2) and France (2). In addition, the European Union appears with 2 publications. However, when analyzing the number of citations, the scenario seems to change: the most cited country is the United States (404 citations), followed by the United Kingdom with 145 citations. Thus, although the United States is in 4th place in terms of number of publications, the high number of citations from the United States may reflect its importance in the research field. Moreover, the United States is the country, along with Spain, that is most concerned with understanding the collective movements of workers, producers, and consumers, as in the case of the taxi platform cooperatives in Austin and New York (Da Silveira et al. 2023b, Wegner et al. 2023).

Figure 3

Scientific Articles Production by Countries



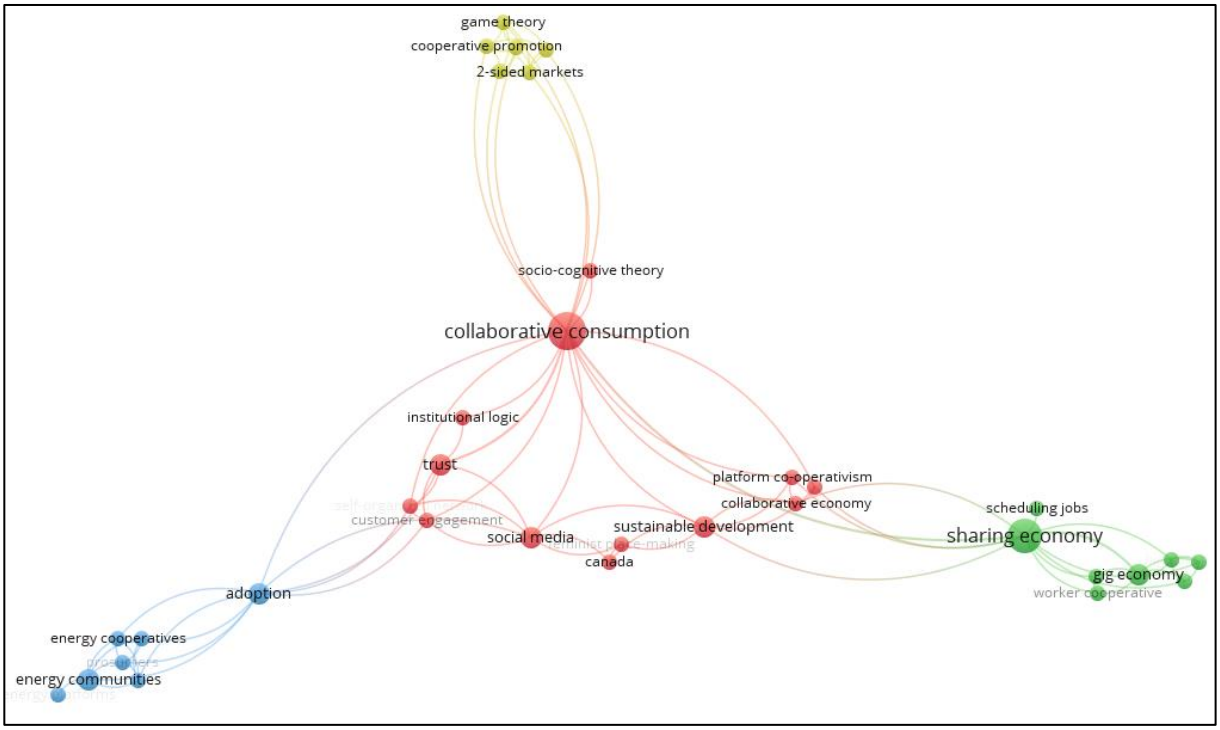
Source: data research

We next stage the results of clustering the 189 groups of keywords. Our first intention was to cluster without limiting the number of clusters. However, the multiplicity of combinations, duplicates, and generic keywords limits the possibilities for summarizing the information it illustrates. We, therefore, decided to force clustering into just four clusters. We expected that clustering would clearly indicate whether the prosumers approach to cooperative platforms studies tends to employ prosumption perspectives with origins in the business, marketing, and consumption behavior. Figure (4) illustrates these first keywords group.

Some keywords such as collaborative economy, gig economy, sharing economy, platform cooperativism, and energy cooperatives showed a more significant increase in occurrence over the years. The keywords in the second graph did not show a significant increase in occurrence, except for the keyword's: actor engagement, self-organized network, cooperative promotion, service platform, and energy communities that scholars are shedding light to better understand. The deep analysis of the strongest keywords can provide a panorama of the field in management, social science, and marketing consumer. Based on this, Figure 5 presents the evolution of the 34 main keywords, as well as the network visualization of the strongest keywords per year published.

Figure 4

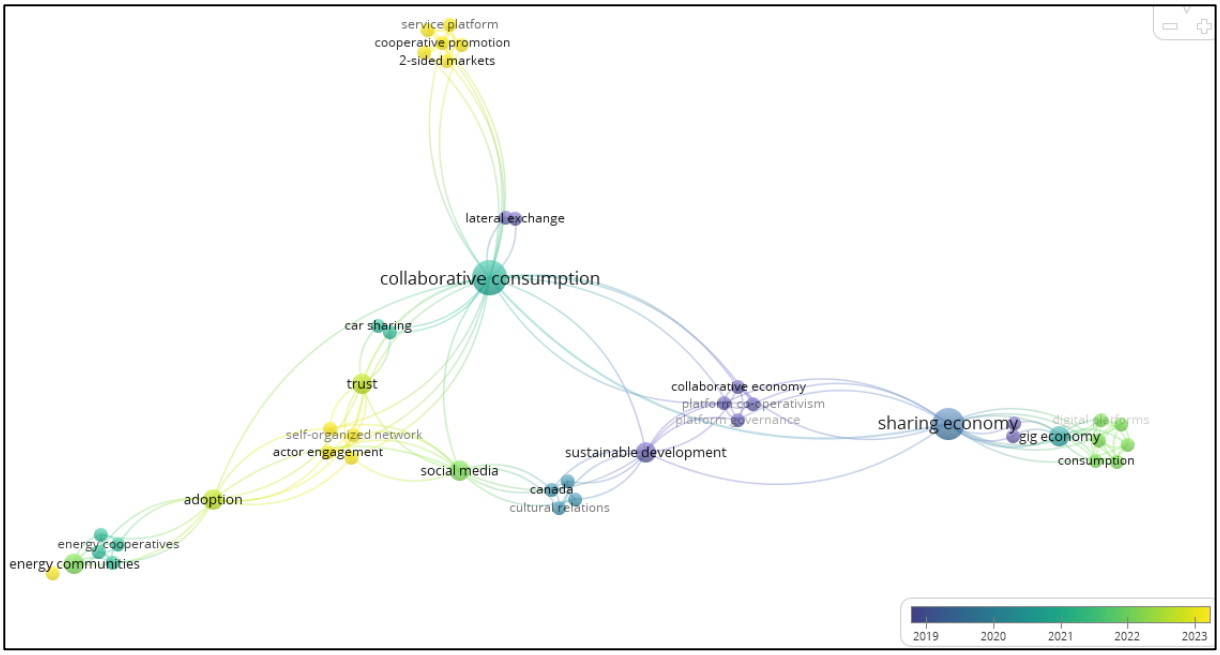
Four-cluster Model of Groups of Keywords



Source: data research

Figure 5

Four-cluster Model of Groups of Keywords x Year Publish Evolution



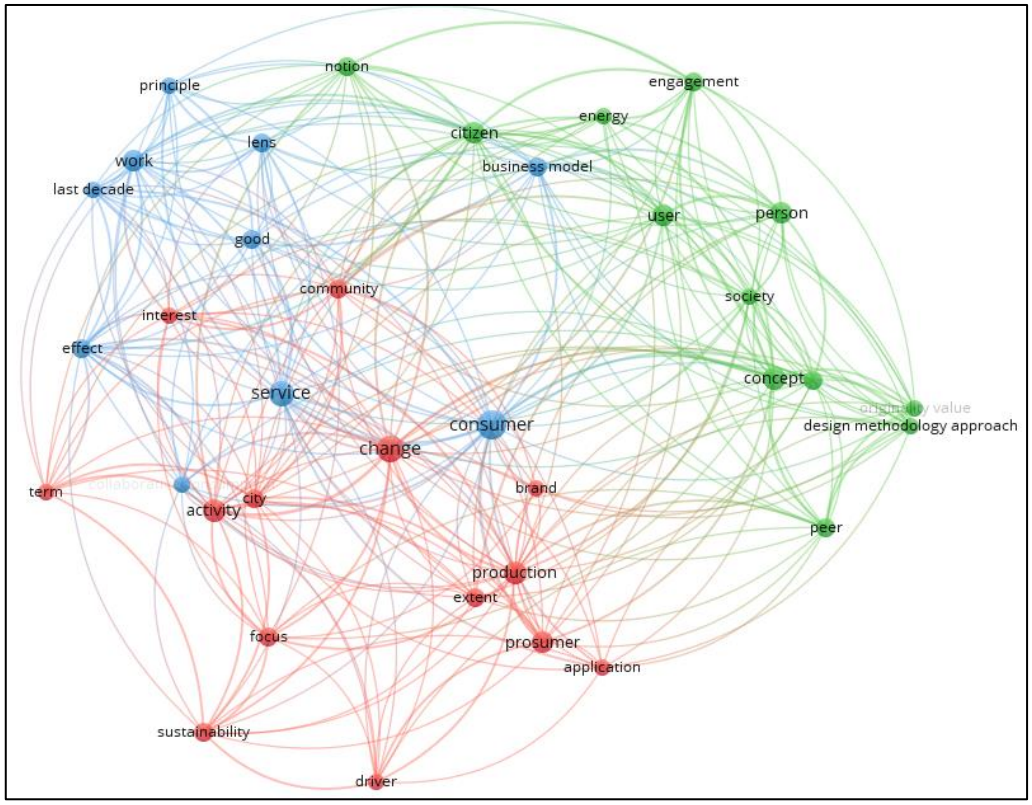
Source: data research

In Figure 4, the red cluster is centered around keywords labelled collaborative consumption (18 mentions). This group contains 13 different keywords. The three most frequent keywords of this red cluster are platform cooperativism (6), collaborative economy (5) and platform governance (4). Sharing economy is the most relevant keyword in the green cluster (14 mentions), in which the gig economy and worker cooperatives are most latent. Blue cluster has adoption (10 mentions) and in the yellow group two keywords receive strong association - 2-sided markets and cooperative promotion (6 mentions). These connections illustrate the relevance of the prosumption approach to explain how collaborative consumption or cooperative happen between prosumers (consumers and producers), while identifying several Europeans (Spain, Netherlands, Norway, and France) and capitalist and communist country (USA and China) as central actors in these digital consumption relations.

In the end, our findings reveal search trends based on the terms with the most occurrences in abstracts, titles, and keywords. Figure 6 shows 3 clusters (blue, green, and red). The red cluster represents a trend in studies of consumers and producers, mainly associated with business models aimed at cooperative workers. Meanwhile, the red cluster represents changes related to forms of work, production, services, and activities. Finally, the green cluster shows methods, concepts and pathways aimed at action by citizens, society, organizations, and the market.

Figure 6

Three-Cluster Terms Trends



Source: data research

Finally, this analyze suggests that the interface between prosumer, cooperative platforms, and prosumption is a latent field for business, marketing, and consumption research. Our review provides a comprehensive overview of these issues. In these terms, we provide a conclusion with a summary of the research questions that we believe should be addressed for future scholars.

Conclusions and Research Contributions

This study has provided the first general overview of the academic research on the management of prosumers, cooperative platforms, and prosumption between 2014 and 2024. The results from a Scopus, WOS, and Science Direct database search from the keywords (“prosumers”) AND (“cooperative platforms”) OR (“prosumption”) AND (“cooperative platforms”) were exported to a .csv and .ris files and analyzed and mapped in-depth by using the VOSviewer and Excel software programs. The significant increase in the number of publications over the years evidences the importance of the subject, especially in digital modern society, in which the daily pass to news trends of production and consumption

through digital technologies.

In terms of thematic trends, our study looked at the co-evolution of studies focusing on the themes of prosumers, platform cooperatives, and prosumption, using a scientometric approach to retrospectively review the application of concepts in marketing and consumption studies and to outline a research agenda. Our findings present an increasing number of publications in the field of economics and social sciences that highlight concerns related to labor, market, and consumption problems that digital technologies, such as digital platforms, may cause in the economy and business. The most relevant journal in business (Journal of Business Research) presents studies on co-consumption, co-production, and co-entrepreneurship, placing the cooperative vision associated with themes related to digital platforms to solve labor and market problems. In interactive marketing, the main suggestion is to understand the digital democratic system supported by cooperative platforms.

There is no magic solution to solve the phenomenon of prosumption on cooperative platforms, and the literature makes it clear that the commitment of consumers, producers, and entrepreneurs is essential, acting in an integrated, equitable, participatory, and democratic manner to mutual gains (Atanasova et al. 2024). In pure cooperation and collaboration, prosumers often engage in peer-to-peer exchanges, contributing goods or services in a peer-to-peer manner. In other words, engagement in communities coupled with open technologies can generate participation, sharing, cooperation, equity, and democratic outcomes (Ertz, Maravilla, and Cao 2025).

In this perspective, we propose some key research questions to better understand this relationship involving prosumers, platform cooperatives, and prosumption. For instance, how does the adhesion process occur between consumers and producers to develop a platform cooperative? How does the process of changing from a (capitalist) market platform model to a cooperative platform model occur, making consumers and producers cooperative members and "business partners"? How can 2-side market be more cooperative through cooperative platforms? What is the choice, preference and experience factors that determine the choice of a platform cooperative service over a traditional digital marketplace platform model? Finally, which method can best explain consumption relationships between consumers and producers through platform cooperatives?

In sum, our review also contributes indirectly to the field of digital consumer behavior

(Bajde et al. 2024) and the role of digital platforms in marketing (Atanasova et al. 2024; Eckhardt et al. 2019). It enhances traditional collaborative consumption formats, such as sharing and access through digital cooperative platforms. The findings of this article build on other systematic reviews conducted previously in related research fields (Wegner et al. 2023; Ghirlanda and Kirov 2024). Methodologically, our contribution is significant as it introduces heat maps and scientometrics as tools to uncover the trajectories of consumption, cooperative platforms, and producers associated with theoretical marketing evolutions. Ultimately, the convergence of consumption, cooperative platforms, and sharing economy perspectives proposes several research questions that need to be addressed.

Lastly, the research is expected to serve as a tool for researchers, entrepreneurs, producers, and consumers involved in managing cooperative platforms, acting as a point of reference or potentially as an inspiration for new research related to the subject and the decision to embark on this alternative business model in the market. Our study has limitations, as it focused on the three main databases (Scopus, WOS, and Science Direct), neglecting an analysis of high-impact journals in the field and the Brazilian database, Scielo. However, future studies can further explore this topic by addressing the questions suggested and proposed in this exploratory research.

References

Abdullah, K. H. et al. (2023), “Digital Marketing: A Scientometric Review”, Contemporary Management Research, 19(1), 55-79.

Anglada, S. E. (2022), “Cultural commons as a key for bottom-linked policies. An exploration of the support for public and community partnerships in Barcelona”, On the W@terfront, 64(12), 3–39. https://doi.org/10.1344/waterfront2021.63.12.01

Anthony, B. (2024), “Decentralized AIoT based intelligence for sustainable energy prosumption in local energy communities: A citizen-centric prosumer approach”, Cities, 152, 105198. https://doi.org/https://doi.org/10.1016/j.cities.2024.105198

Atanasova, A. et al. (2024), “Platform cooperatives in the sharing economy: How market challengers bring change from the margins”, Journal of the Academy of Marketing Science, 1-20.

Bajde, D., Golf-Papez, M., and Culiberg, B. (2024), “The cultural underpinnings of platformization: how social movement organizations helped form the category of the

sharing economy", Marketing Theory, 24(1), 153-172.

Bardhi, F., and Eckhardt, G. M. (2012), "Access-based consumption: The case of car sharing", Journal of consumer research, 39(4), 881-898.

Basili, M., and Rossi, M. A. (2020), "Platform-mediated reputation systems in the sharing economy and incentives to provide service quality: The case of ridesharing services", Electronic Commerce Research and Applications, 39, 100835.

Belk, Russell W. (2014), "You are What You Can Access: Sharing and Collaborative Consumption Online", Journal of Business Research, 68 (8), 1595–600.

Boekelo, M., and Kloppenburg, S. (2023), "Energy platforms and the future of energy citizenship", Energy Research & Social Science, 102, 103165. https://doi.org/https://doi.org/10.1016/j.erss.2023.103165

Boyaval, M., and Herbert, M. (2018), "One for all and all for one? The bliss and torment in communal entrepreneurship", Journal of Business Research, 92, 412–422. https://doi.org/https://doi.org/10.1016/j.jbusres.2018.06.023

Boysen, N. et al. (2019), "Matching supply and demand in a sharing economy: Classification, computational complexity, and application", EUROPEAN JOURNAL OF OPERATIONAL RESEARCH, 278(2), 578–595. https://doi.org/10.1016/j.ejor.2019.04.032

Busca, L., and Bertrandias, L. (2020), "A Framework for Digital Marketing Research: Investigating the Four Cultural Eras of Digital Marketing", Journal of Interactive Marketing, 49(1), 1-19. https://doi.org/10.1016/j.intmar.2019.08.002

Carrión, J. R. H. (2022), "Deconstructing the "peer-to-peer sharing economy": The challenge of the collaborative economy to platform co-operatives in the post-labor age of the 21st Century", CIRIEC-ESPANA REVISTA DE ECONOMIA PUBLICA SOCIAL Y COOPERATIVA, 105, 177–204. https://doi.org/10.7203/CIRIEC-E.105.17784

Chen, F. W. et al. (2024), "A networking view of collaborative consumption on social media: integrating value-in-exchange and value-in-use into value co-creation", MANAGEMENT DECISION. https://doi.org/10.1108/MD-04-2023-0614

Culiberg, B. et al. (2023), "Psychological contract breach and opportunism in the sharing economy: Examining the platform-provider relationship", Industrial Marketing Management, 111, 189-201.

Da Silveira, A. B. et al. (2022), "How digital platforms materialize sustainable collaborative

consumption: a Brazilian and Canadian bike-sharing case study", Journal of International Consumer Marketing, 34(1), 51-71.

Da Silveira, A. B et al, (2023a), "Flattening Consumption Relations Mediated by Sharing Economy Platforms: A Rental Goalkeeper Case Study", in XLVII Encontro da ANPAD – EnANPAD, São Paulo - DOI: https://doi.org/10.21714/2177-2576EnANPAD2023

Da Silveira, A. B. et al. (2023b), "Platform cooperativism as an alternative to post-Covid-19 economic development: evidence from Brazil", Revista de Gestão e Organizações Cooperativas, 10(20), e83893-e83893.

Dalmoro, M. et al. (2023), "Princípios do Cooperativismo de Plataforma na Construção de Arranjos de Mercado", Revista Interdisciplinar de Marketing, 13(1), 47-58.

de Sousa, F. D. B. (2021), "Management of plastic waste: A bibliometric mapping and analysis", Waste Management & Research, 39(5), 664-678.

Doonan, N. (2020), "A Lower North Shore Story: containers for feminist place-making in Québec, Canada", Gender, Place and Culture, 27(7), 965–983. https://doi.org/10.1080/0966369X.2019.1620700

Eckhardt, G. M. et al. (2019), "Marketing in the sharing economy", Journal of Marketing, 83(5), 5-27.

Ertz, M. (2020), "Collaborative consumption, a buzzword that has gone conceptual: Three shades of the sharing economy", Oikonomics, 14(14), 1-14.

Ertz, M., Maravilla, J. M. B., and Cao, X. (2025), "Prosumer: A new approach to conceptualization", Journal of Innovation & Knowledge, 10(1), 100653.

Espelt, R. (2020), "Agroecology prosumption: The role of CSA networks", Journal of Rural Studies, 79, 269–275. https://doi.org/10.1016/j.jrurstud.2020.08.032

Esteves, A. M. (2022), "Processes of normative regulation in spaces of "solidarity economy": a comparative case study analysis", International Journal of Sociology and Social Policy, 42(7–8), 624–639. https://doi.org/10.1108/IJSSP-12-2020-0540

Ferraz, D. L. D. S. et al. (2021), "Desvelando o prosumption: o produtor-consumidor, as plataformas digitais e o movimento do capital", REAd. Revista Eletrônica de Administração (Porto Alegre), 27(2), 519-546.

Georgarakis, E. et al. (2021), "Keep it green, simple, and socially fair: A choice experiment on prosumers' preferences for peer-to-peer electricity trading in the Netherlands",

ENERGY POLICY, 159. https://doi.org/10.1016/j.enpol.2021.112615

Ghirlanda, P., and Kirov, V. (2024), "An alternative organizational model for a more democratic and equitable digital economy: A systematic literature review on platform cooperativism through the lens of stakeholder theory", Competitive advantages and challenges, ANNALS OF PUBLIC AND COOPERATIVE ECONOMICS. https://doi.org/10.1111/apce.12478

Goldkind, L., and McNutt, J. G. (2019), "Vampires in the Technological Mist: The Sharing Economy, Employment and the Quest for Economic Justice and Fairness in a Digital Future", Ethics and Social Welfare, 13(1), 51–63. https://doi.org/10.1080/17496535.2018.1512139

Gough, M. et al. (2020), "Prosumer flexibility: A comprehensive state-of-the-art review and scientometric analysis", Energies, 13(11), 2710. https://doi.org/10.3390/en13112710

Jin, S. T. et al. (2018), "Ridesourcing, the sharing economy, and the future of cities", Cities, 76, 96–104. https://doi.org/https://doi.org/10.1016/j.cities.2018.01.012

Julsrud, T. E., and Uteng, T. P. (2021), "Trust and sharing in online environments: A comparative study of different groups of Norwegian car sharers", Sustainability (Switzerland), 13(8). https://doi.org/10.3390/su13084170

Labrecque, Lauren I. et al. (2013), "Consumer Power: Evolution in the Digital Age", Journal of Interactive Marketing, 27, 4, 257–69, https:// doi.org/10.1016/j.intmar.2013.09.002.

Lang, S., Minnucci, G., Mueller, M., and Schlaile, M. P. (2023), "The Role of consumers in Business Model Innovations for a Sustainable Circular Bioeconomy", Sustainability (Switzerland), 15(12). https://doi.org/10.3390/su15129573

Martin, C. J. et al. (2017), "Democratising platform governance in the sharing economy: An analytical framework and initial empirical insights", Journal of Cleaner Production, 166, 1395–1406. https://doi.org/10.1016/j.jclepro.2017.08.123

Mestres, S. G., and Lien, M. E. (2017), "Recovering Food Commons in Post Industrial Europe: Cooperation Networks in Organic Food Provisioning in Catalonia and Norway", JOURNAL OF AGRICULTURAL & ENVIRONMENTAL ETHICS, 30(5), 625–643. https://doi.org/10.1007/s10806-017-9691-6

Moral, A. M., Jurado, E. B., Uclés, D. F., Viruel, M. J. M., & Poyatos, R. P. (2020). "Second degree cooperativism and ICT adoption". CIRIEC-ESPANA REVISTA DE ECONOMIA PUBLICA SOCIAL Y COOPERATIVA, 100, 67–85. https://doi.org/10.7203/CIRIEC-E.100.17712

Osti, G., & Carrosio, G. (2020). "Nested markets in marginal areas: Weak prosumers and strong food chains". Journal of Rural Studies, 76, 305–313. https://doi.org/https://doi.org/10.1016/j.jrurstud.2020.04.004

Papadimitropoulos, E. (2021). "Platform capitalism, platform cooperativism, and the commons. Rethinking Marxism", 33(2), 246-262.

Parra-Dominguez, J., Sanchez, E., & Ordonez, A. (2023). "The prosumer: A systematic review of the new paradigm in energy and sustainable development". Sustainability, 15(13), 10552. https://doi.org/10.3390/su151310552

Paredes, A. (2023). "The political work of food delivery: consumer co-operative systems and women's labor in "relationless" Japan". Food, Culture and Society, 26(5), 1174–1192.https://doi.org/10.1080/15528014.2022.2113284

Perren, R., Stewart, K., ans Satornino, C. B. (2019), "Puritan peers or egoistic entrepreneurs? Moral decay in lateral exchange markets", Journal of Consumer Marketing, 36(3), 366–378. https://doi.org/10.1108/JCM-03-2018-2625

Sarkar, J. G., Sarkar, A., and Sreejesh, S. (2022), "Prosumption through advergames: leveraging on advergame format and reward elements to create a sacred brand", European Journal of Marketing, 56(10), 2649–2676. https://doi.org/10.1108/EJM-10-2021-0798

Scholz, T. (2016), "Platform cooperativism: Challenging the corporate sharing economy", New York: Rosa Luxemburg Stiftung.

Sörum, N., and Fuentes, C. (2023), "How sociotechnical imaginaries shape consumers' experiences of and responses to commercial data collection practices", Consumption Markets & Culture, 26(1), 24-46.

Van Eck NJ and Waltman L (2019), VOSviewer manual, 5/5/2024. www.vosviewer.com/documentation/Manual_VOSviewer_1.6.13.pdf

Vasconcellos, S. L. D. et al. (2024). "A SCIENTOMETRIC ANALYSIS OF INSTITUTIONS IN THE INTERNATIONAL BUSINESS RESEARCH", Revista de Administração de Empresas, 64, e2022-0310.

Verkade, N., and Höffken, J. (2017), "Is the Resource Man coming home? Engaging with an

energy monitoring platform to foster flexible energy consumption in the Netherlands", Energy Research and Social Science, 27, 36–44. https://doi.org/10.1016/j.erss.2017.02.015

Webster J, Watson RT (2002), Analyzing the past to prepare for the future: writing a literature review, MIS Q xiii–xxiii. https://www.jstor.org/stable/4132319

Wegner, D. et al. (2023), "A systematic review of collaborative digital platforms: structuring the domain and research agenda", Review of Managerial Science, 1-33.

Wei, X. et al. (2021), "From co-consumption to co-production: A systematic review and research synthesis of collaborative consumption practices", Journal of Business Research, 129, 282–294. https://doi.org/https://doi.org/10.1016/j.jbusres.2021.02.027

Wieczorek, A. J. et al. (2024), "Citizen-led decentralised energy futures: Emerging rationales of energy system organization", Energy Research & Social Science, 113, 103557. https://doi.org/https://doi.org/10.1016/j.erss.2024.103557

Yan, K., Hua, G. W., Cheng, T. C. E., Choi, T. M., Dong, J. X., and Li, X. Z. (2023), "Optimal Pricing and Quality Decisions Under Cooperative Promotion of Cross-Market Service Platforms", IEEE TRANSACTIONS ON ENGINEERING MANAGEMENT. https://doi.org/10.1109/TEM.2023.3301886

Xiang, D. et al. (2022), "Prosumer-to-customer exchange in the sharing economy: Evidence from the P2P accommodation context", Journal of Business Research, 145, 426-441.

"*Lutar, construir, reforma agrária popular*": decolonial analysis of the convergence between the Landless Workers' Movement with the traditional food market

Pilar Petrasi Guahnon Fleck

Marcelo Jacques Fonseca

Marcus Wilcox Hemais

Abstract

This paper analyzes, based on the decolonial perspective of transmodernity, the legitimation process of the *Movimento dos Trabalhadores Rurais Sem Terra* (MST) (in English, the Landless Workers' Movement) as it enters the traditional food market. The study sought to identify strategies employed by the MST to overcome inherent tensions arising from the convergence with the capitalist market it needs to navigate to engage with such food market. The study utilized a qualitative multimethod approach, with primary and secondary data collection. The analysis revealed that, although still a contested movement, the MST is undergoing a process of legitimation. The Movement employs transmodern approaches within the traditional food market, which contribute to strengthening its legitimacy as a differentiation strategy. Lastly, the study calls for a debate on the social role of markets and underscores the importance of advancing future studies to support the construction of new social realities.

Keywords: Transmodernity, market legitimacy, traditional food market,

1. Introduction

Starting from the period known as the "Colonization of the Americas," the first historical outlines are traced, shedding light on the issues contemplated in this study. The European colonization of the Americas played a central role in structuring coloniality, framing a specific form of domination and exploitation over the area that persisted even after the political independence of Latin American nations (Mignolo 2017). This historical period was marked by the imposition of the coloniality of power - a concept not limited to the political and territorial subjugation of former colonies by European powers but involving a complex set of power relations persisting through time, maintaining a social hierarchy based on racial and cultural criteria (Quijano 2005) -, redefining social, cultural, and economic relations between

Europe and Latin America, thus sustaining the perpetuation of inequality and the marginalization of indigenous and Afro-descendant peoples.

Historical colonization laid the foundations for the project of Modernity, which consolidated the coloniality of power. The Americas represent the first identity of Modernity, serving as the stage where the most significant cultural, political, social, and economic encounters occurred after the European expansion in the late 15th century, creating new social codifications based on differences between the colonized and colonizers and forms of control over labor, resources, and products, organized in favor of capital and the global market (Mignolo 2005).

The world-system theory, developed by Wallerstein (1974), argues that the global capitalist system developed over centuries by dividing countries into three categories: the core (industrialized and dominant countries), the periphery (less developed and exploited countries), and the semi-periphery (countries in transition between the core and periphery). This division resulted in relationships of exploitation and inequality, where core countries benefit at the expense of peripheral and semi-peripheral countries (Wallerstein 1974).

In this scenario, the issue of historical land concentration in Brazil emerges as an intrinsic element to the functioning of the global capitalist system. Production aimed at meeting the demands of developed countries has often reinforced an agricultural model favoring large estates at the expense of equitable land distribution (Miralha 2012).

In the call for the redistribution of unproductive lands, the *Movimento dos Trabalhadores Rurais Sem Terra* (MST) (in English, the Landless Workers' Movement) arises. In addition to advocating for agrarian reform and land access, the MST sought, and still seeks, alternatives in combating poverty, hunger, rural exodus, and neglect for environmental preservation. By raising and advocating for social issues, having begun its articulation during the Military Dictatorship in Brazil and with the support of opposition parties, the Movement was severely combated and criminalized by various sectors and conservative forces in society, influenced by economic, political, and cultural factors. For these reasons, it is suitable to be framed as a contested actor (Humphreys, Chaney, and Slimane 2017) in Brazilian society.

Currently, despite all the repression it has faced throughout its history, the MST organizes itself throughout Brazil and is an internationally recognized social movement, being

the largest in Latin America. From this scenario, we take the MST in its legitimation process as the object of the present study, as it is assimilated and consumed by society.

The legitimation of products and markets is a concept present in organization studies and has received attention in contemporary studies of strategy, marketing, and sociology (Humphreys 2010a, 2010b). Due to its complex nature, the theme has been examined in various ways by studies seeking to understand how a general perception of desire and appropriateness for a particular organization is constructed within a social framework, composed of its rules, norms, values, and beliefs.

In a broader sense, in a society, legitimation can preserve or alter the practices, behaviors, and other forms of organization of individuals, thus being of great value for the success and perpetuation of businesses (Giesler and Fischer 2016). Understanding legitimation processes becomes even more important when the market in question is in some way contested or challenges the *status quo* of that ecosystem (Humphreys, Chaney, and Slimane 2017). Especially when there is some form of moral contestation, the emergence and development of products and markets can be hindered or even rendered impossible.

Furthermore, as one of the theoretical lenses chosen for this study, the theory of transmodernity by Enrique Dussel (2016) stands out. Since the study understands the MST as a materialization of the insubordinate search for strategies that transcend the paradigms of modernity, Dussel's transmodern approach offers a perspective that critically examines how social movements, like the MST, seek to build alternatives to the hegemonic global system. Dussel (2016) suggests that transmodernity represents an attempt to overcome the limitations of modernity, promoting justice, diversity, and solidarity in contrast to the oppressive and homogenizing aspects of modernity.

Thus, based on the decolonial perspective of transmodernity, this study aims to analyze the legitimation process of the MST in the traditional food trade market in Rio Grande do Sul. To achieve this objective, qualitative research was conducted, with the collection of primary and secondary data, the former being obtained through in-depth interviews with leaders of the MST, representatives of the MST's Armazém do Campo stores, and consumers of the Movement's products, as well as participant observation at fairs organized by the MST and its stores.

After these introductory comments, the rest of the paper is organized into six more sections. In Section 2, we discuss the concept of coloniality of power. In Section 3, we discuss the concept of transmodernity, while in Section 4, we debate the concepts of market legitimation and contested markets. Section 5 presents our methodological procedures. In Section 6, we analyze and discuss the collected data. Finally, in Section 7, we make our final considerations.

2. Coloniality of Power as a form of Domination of Europe over Latin America

Colonialism, as a historical period, arose from the territorial expansion marked by navigations and the invasion of new continents by Europeans. According to Quijano and Wallerstein (1992), the creation of the geosocial entity of the Americas was the constitutive act of the modern world system. The Americas were crucial for sustaining a capitalist economy, with the logic of exploiting peripheral countries (the Americas and Africa) by the center countries of the world. The processes of exploitation and domination established by colonizers had effects on various structuring aspects of Latin American society, such as the territory, culture, and religion of the colonized peoples. By controlling the knowledge and actions of the colonized, colonizers imposed their culture while simultaneously working towards weakening, alienating, and assimilating local culture (Mignolo 2017).

Quijano (2005) argues that the complexity of Latin American societies, considering their historical, cultural, ethnic, and structural characteristics, can be framed within the concept of historical-structural heterogeneity, a result of power relations established during colonization that profoundly influenced how social, economic, and political structures developed in the region. Dussel (1993), for his part, contends that, from the colonization process, an intrinsic superiority was created within the Eurocentric cultural, territorial, and modern expansion project, resulting in the accumulation of wealth, knowledge, and experiences from Europe at the expense of other continents.

Building on the processes of colonialism, Quijano (2005) introduces the concept of the coloniality of power. It is a dominant form of control over resources, labor, capital, and knowledge limited to a power relationship articulated by the capitalist market. In other words, the end of historical colonialism as an economic regime and mode of socio-political organization did not mean the end of colonial practices and social structures with colonial

interferences in the social imaginary. As a consequence of colonialism, the coloniality of power uses capital to commodify resources and, primarily, labor, which would not be possible without a relationship of domination between peoples, based on a European view of exploitation and subjugation.

The coloniality of power, crystallizing domination relations between peoples since the early modern period, can be observed currently in various practices in Brazilian society, such as structural racism, which is one of its most characteristic and profound marks. According to Wanderley (2014), intersections between coloniality and family farming in Brazil can be identified. The author highlights how family farming, although a traditional form of production, is still embedded in contexts of coloniality, facing challenges related to land concentration, social and political inequalities, and marginalization. These colonial structures repress the potential of family farming to develop all the potentialities of its own classical system of production and social life.

3. Transmodernity: Seeking to escape the Coloniality of Power

The coloniality of power has produced various forms of domination, including the imposition of dominant forms of knowledge and epistemologies by colonizers on colonized populations. Epistemological domination occurs when dominant knowledge systems are considered unique, universal, and objective, while traditional knowledge and wisdom are marginalized, devalued, or even ignored. This perpetuates the coloniality of power, as dominant knowledge systems are often used to justify the exploitation, subjugation, and marginalization of colonized populations (Quijano 2005).

However, in the last decades of the 20th century, in response to previous theories in the field of Social Sciences—modernist and postmodernist perspectives that proved limited by not considering the asymmetry of actors and their intersubjectivity at all levels—the Latin American philosophical and political movement called Philosophy of Liberation emerged. At its core, this philosophical current proposes a break from neocolonial models that seek to dominate, suppress, and annihilate peripheral cultures (Dussel 2016).

Based on these questions about a hegemonic view of cultures in general, Dussel (2002) proposes the theory of transmodernity, which is grounded in the idea that overcoming conditions of oppression and exploitation is only possible through a radical critique of

modernity and a redefinition of social, political, cultural, and economic relations. Transmodernity suggests a path to transcend the limitations of modernity, not completely denying it but at the same time not succumbing to its logic. "Transmodernity" indicates all aspects that exist on the margins of structures valued by modern Eurocentric culture, implying that dialogue and/or construction must necessarily be transversal, not presupposing the illusion of symmetry between cultures and actors (Dussel 1993).

Thus, transmodernity proposes a more inclusive and plural view of the world that values differences and diversity, contributing to the construction of a fairer, more sustainable, and possible future for all (Dussel 2016). In this sense, a transmodern approach is relevant to any issues and initiatives developed in the Global South. Contemporary Brazil still suffers from the effects of the colonization process, which resulted in the production and perpetuation of structures of social, racial, and economic inequality that capitalism has proven incapable of correcting.

4. Market legitimation and contested markets

In contrast to beliefs that markets establish themselves spontaneously, studies have shed light on the human effort contributing to their creation and development (Giesler and Fischer 2016). Markets are then understood as systems of individuals, groups, and/or other elements linked in their participation in exchanges, constructing the legitimacy that drives their formation.

According to Humphreys (2010a), there are two theoretical approaches that address the creation of markets. The first approach refers to marketing research, focusing on the study of products and organizations to fill a need and develop new technology to attract new consumers. The second approach is understood as the process of legitimation. According to Humphreys (2010b), market legitimacy is a social process that confers acceptance and desirability to a particular product.

To systematize legitimacy, the author employs institutional theory, which argues that the legitimacy of consumption practices should be understood not only by assessing consumer perceptions but also by considering the influence of generalized public discourse, legal structures, and companies. Institutional theory proposes that markets be evaluated in relation to a multidimensional construction, composed of three legitimacy spheres:

regulatory, normative, and cultural-cognitive. The first dimension is achieved when the market aligns with the rules, laws, and governance under which it operates. Normative legitimacy concerns the alignment of the market with social norms, values, and expectations. Cultural-cognitive legitimacy is the alignment of the market with individuals' cognitive schema, and how they make assumptions and decisions (Scott 1995).

Thus, as explained, legitimate markets are established as the three dimensions converge and support each other. However, the process through which this result is achieved can be complex and non-linear, intentional and/or spontaneous. Therefore, legitimation is a social process in which market actors engage in continuous negotiation of the interests of a market and their own interests. From this perspective, the study of consumption itself becomes even more complex and necessary in the Brazilian context and within social movements.

After addressing the concept of market legitimation, it is essential to focus special attention on contested markets, as these do not emerge spontaneously and are not readily accepted by societies due to various social influences to which they are subject. Although the study in question does not specifically focus on the legitimation of a market, but rather a specific actor, the focus on contested markets is essential since the MST is an assertive social movement that has historically been criminalized.

Contested markets are those whose consumption practices and the supporting regulatory, normative, and cognitive-cultural pillars are questioned and/or challenged (Humphreys, Chaney, and Slimane 2017). This is due to the fear that market logic will penetrate areas considered sensitive and somehow transform people's privacy or reality, their integrity, their rights, or even the maintenance of public order.

Contested markets provide an ideal scenario for the analysis of the legitimation perspective since, in this thesis, contested markets are defined as market spaces where actors with divergent interests are in conflict as they struggle over the meaning of some element of the market or the market itself and engage in actions to challenge, disturb, or destabilize the legitimacy of the product or the market.

Therefore, the processes surrounding the creation and legitimation of the market tend to be more visible and observable in contested markets, as in the case of the MST itself. This is because when markets are contested, and key actors are attacked or threatened by the work

of other actors, they also engage in work to preserve their interests (Humphreys, Chaney, and Slimane 2017). However, there is little research regarding contested markets and the dynamics that fuel contestation, rupture, and resolution.

5. Methodological procedures

The present study adopted a decolonial epistemology to guide its methodological approach. This perspective emerges as a critical response to the persistent influence of colonialism on the forms of knowledge produced and disseminated in academic institutions, aiming to promote the inclusion of marginalized voices and the recovery of subalternized knowledge (Quijano 2005). Therefore, the methodology helped the authors to reach a subalternized context and use their findings to question the hegemony behind determined assumptions about markets, based on how the MST is engaging with such a capitalist structure and using it to advance its transmodern agenda.

During the data collection stage, the MST and its market incursions (with a specific focus on the state of Rio Grande do Sul) were studied based on various sources. The study emphasizes the commercial aspect of the Movement, which is controversially and paradoxically assimilated by society, showing signs of both appropriation and legitimation of its main symbols.

As a multimethod research, the procedures for data collection were diverse and primarily included qualitative techniques, such as: desk research; analysis of publications about the MST and its products in the media; analysis of the formulation of laws and regulations regarding the organic market and products from family farming; in-depth interviews with the MST's leaders and representatives of Armazém do Campo stores (the Movement's stores); in-depth interviews with consumers of MST's products; and one of the researchers' observations at fairs and MST's stores, resulting in notes in a field diary.

Interview rounds with MST's leaders and consumers of the movement's products were scheduled through researcher contact, conducted virtually, recorded, and later transcribed and coded to contribute to the study's analysis. The interviews, in all, lasted about an hour each.

The data was analyzed based on Bardin's (2011) content analysis. This technique is relevant for the objective and systematic description of the evident content of communication

(Marconi and Lakatos 2006). In addition to describing what was said and observed, content analysis seeks to interpret and seek the meaning production of the phenomena under analysis.

The use of the traditional content analysis technique in a decolonial study requires a contextualized approach. When applying this technique, it is necessary to pay attention to how colonial structures can influence data interpretation and find ways to challenge these assumptions, promoting a more inclusive analysis sensitive to non-hegemonic perspectives. To ensure a thorough analysis of the data, the analysis model proposed by the authors was applied in three phases: 1) pre-analysis; 2) exploration of the material; and 3) data treatment, inference, and interpretation.

Regarding data collection and systematization for desk research and media publication analysis, the first step was to identify relevant sources for the research. This involved searching websites, portals, social media, and communication channels. Keywords related to the study's theme were used to refine searches and find relevant information, including: MST, Movimento Sem Terra, agrarian reform, MST products, agroecology, and organic food. After selecting sources, a careful reading of texts, publications, and comments was conducted. During this stage, preliminary notes were made on the main arguments, concepts, symbols, and evidence found in the sources. Specific excerpts that could be useful for later analysis were also identified.

The collected data were organized into relevant analysis categories based on the identification of patterns, trends, and contradictions that were present. An inductive approach was used to create categories, allowing information to guide the formation of groupings.

The analysis and interpretation of the data were conducted considering the previously established categories, culminating in the formulation of conclusions and insights that addressed the research objectives.

6. Analysis and discussion of the collected data

The following section analyzes and discusses the collected data, and is divided into five subsections. The first subsection briefly exposes the context behind the creation of the MST as a response to land issues in Brazil. The second subsection presents evidence that the MST is undergoing a legitimation process. The third subsection illustrates the MST’s management

model and how it is based on a transmodern approach. In the fourth subsection, the evolution of the MST's transmodern management model as a legitimation strategy is reviewed. The fifth subsection debates the role of markets in the social debate around contested actors.

6.1 Land issues in Brazil and the rise of the MST

Modernity played a significant role in reconfiguring the agrarian system of colonies, directly influencing social and economic dynamics and people's relationship with nature (Mignolo 2010). The arrival of European colonizers introduced new agricultural technologies, large-scale production systems, and management patterns aimed at maximizing profits and exploiting the natural resources of the colonies.

In Brazil, like in other colonies, land regulation has a complex history, marked by conflicts and inequalities. With the country's independence from Portugal in 1822, land ownership became a privilege of the agrarian elite, which seized large land holdings and established large-scale farming as the production model (Miralha 2012).

Despite advances in land access policies since the late 20th century, land regulation in Brazil remains a controversial and conflict-ridden issue. Land concentration in the hands of a few owners, land grabbing, violence in rural areas, and lack of land access for small farmers are among the main problems faced by the country. Agrarian reform and land regularization are considered necessary measures to ensure social justice and sustainable development in rural areas (Miralha 2012).

The Movimento dos Trabalhadores Rurais Sem Terra has its roots in the agrarian issue, which is structural and historical in Brazil. It emerged from the articulation of land struggles, intensified from the late 1970s, especially in the Center-South region of the country, gradually expanding throughout Brazil. Therefore, the relationship between the MST and the history of Brazil's colonization is intrinsically linked to the fight against the historical consequences of the colonial process. More recently, the Movement has increased its participation in the organic and agro-industrial food trade, aiming to generate employment and income for settlers, provide healthy food for the population, and strengthen its central goals: the fight for land, for agrarian reform, and for the construction of a more just society without exploitation hierarchies.

6.2 Evidence that the MST is undergoing a legitimation process

Legitimation refers to the process through which organizations seek to establish and maintain social acceptance and recognition of their activities and business practices. Organizations aim to become legitimate in the eyes of their audiences and, in the case of the MST, also strengthen their causes. Several studies address the practices, participation, and interaction of different actors in the legitimation process (Humphreys 2010a, 2010b; Scott 2008; Suchman 1995). However, these studies lack ideological or political perspectives, especially involving social movements.

The context of the MST provides a fertile ground for working with legitimation. Not only due to its increased visibility and recognition by civil society but also because of its recent professionalization, commercial expansion, and integration into a market niche that is growing in numbers and relevance, namely the organic food market (Varejo SA 2023). This section discusses the construction of legitimacy based on its support institutions (Humphreys 2010a, 2010b; Scott 2008; Suchman 1995): regulatory, normative, and cultural-cognitive.

In the regulatory legitimation sphere, it is possible to observe that the MST displays labels for both organic and family-farm-produced foods on its packaging. The organic food label indicates certification by an accredited entity, ensuring that the food was produced following organic farming principles, including the use of sustainable methods, environmental respect, animal welfare, and the prohibition of synthetic pesticides, chemical fertilizers, and genetically modified organisms in its production. The family-farm label indicates that these products were produced through a type of agriculture carried out by families who rely on the land as their main means of subsistence and income, contributing to the valorization of local production, the strengthening of regional economies, and income generation in rural areas. This reinforces consumers' general perception that, by buying these foods, they are contributing to a more just and sustainable economic, social, and environmental system.

Although consumers of the MST do not explicitly mention these labels in the interviews conducted, it is apparent that they reinforce or drive a general perception among consumers that MST’s foods have guaranteed provenance. Additionally, in cases where there is no packaging, such as bulk produce at markets, the Movement is considered a seal of approval for healthy and organic food, from the perspective of consumers.

Analyzing normative legitimacy - the degree to which an organization adheres to the norms and values of the social environment -, some attributes of the MST perceived by its consumers indicate that the Movement has been viewed more positively recently, with endorsement from parts of society. The city of Porto Alegre, for instance, where the data for this study was collected, is widely recognized for its abundance of organic markets. A notable feature of these markets is the frequent presence of MST settler stalls, always identified by flags, caps, or their products. The presence of these MST stalls not only indicates the Movement's expansion but also reflects a normative alignment as consumers actively seek their food and attend these places, which, besides being commercial venues, position themselves in favor of agroecology.

Similarly, consumers highlight the quality, competitive pricing, and fair production chain of MST's foods. This perception demonstrates that the MST is aligning normatively with this audience, according to legitimation theory. Furthermore, the fact that the MST represents a proposal for more equitable relations among producers, consumers, and nature is in line with the norms and values advocated by this audience, indicating elements of normative legitimacy.

In addition to direct demand, evidence collected during the participant observation and interviews at both markets and the Armazém do Campo stores shows signs of indirect demand through other actors in the traditional market. Grain processing companies have been purchasing large quantities of rice from the Movement, as there is a market demand for organic rice that these companies cannot produce or obtain from other producers. Although indirect demand does not necessarily reflect the normative legitimation of the MST, it reinforces, from a broader perspective, the segment in which the MST operates and is recognized as a reference: organic food production.

Another aspect indicating normative alignment is the trade of MST's foods through e-commerce in some cities, as this consumption model is increasingly consolidated in today's society. The fact that the Movement opts for this business model shows that it recognizes and adapts to the preferences and behaviors of contemporary consumers, who also seek convenience, practicality, and variety when making online purchases.

Cultural-cognitive legitimacy, on the other hand, is the degree to which an organization is known and assimilated by social actors, including its consumers. In the case of the MST, the

cultural-cognitive dimension is perceived in the Movement's alignment with the individual motivations of some consumers regarding the consumption of healthy foods and contributing to the construction of better ecosystems.

According to Mignolo (2017), modernity introduced the Western concept of nature as a productive resource, breaking with the subjectivity of indigenous peoples who did not distinguish between "nature" and "culture," seeing themselves as beings integrated with the land. In recent years, with the negative consequences of the modernity project, there has been an expansion of general social awareness regarding ecological issues, with a growing concern for environmental sustainability and human health. In this context, the demand for organic foods increases, legitimized by the cultural perception that they are more beneficial for both the environment and consumer health. Beyond ecological concerns, the consumption of MST's foods is also connected to a systemic approach to the environment, health, and social justice. It represents a more integrative ideological alignment that extends beyond individual needs.

The cultural-cognitive dimension is also related to how ideas and symbolic representations are constructed and disseminated in society. The media, for example, plays a significant role in shaping cultural perceptions and legitimizing certain markets (Humphreys 2010b). In this sense, recent media publications on the MST indicate that the Movement's legitimation process is underway.

It can also be observed that the MST's transmodern approach emerges as a response to the change in the cultural-cognitive scheme of consumers observed in recent years, where there is growth in the search for new ways to understand and relate to the world. The transmodern approach recognizes the complexity and interconnectedness of environmental, economic, and social challenges, seeking to integrate different perspectives and knowledge to address these issues holistically.

Dussel (2002) proposes that transmodernity is an ethic of inclusion, social justice, and mutual respect, aiming for a more open and interconnected society. In this sense, the Movement positions itself as the materialization of the concept of transmodernity for consumers, who are increasingly interested in products and practices aligned with a new worldview that promotes a positive impact on the environment, seeing themselves connected

to the Movement and the ecosystem in which they are embedded, seeking to maximize collective benefits.

The data collected suggest that, despite being a highly contested movement since its inception, the MST is finding ways to legitimize itself in Brazilian society, already showing signs of this legitimation among a more ideologically aligned audience. However, the MST still faces resistance from various sectors of society and likely from other consumer profiles. With this in mind, the Movement itself acknowledges the resistances and develops strategies to overcome them.

6.3 Management model of the MST as a transmodern market approach

Modernity played a fundamental role in shaping and developing the capitalist system. Beyond economic conditions, modernity also provided the ideological and institutional foundations for the rise of the free market, economic competition, and wage labor, profoundly shaping social structures, power relations, and economic dynamics over the past centuries (Mignolo 2017).

The arena of exchanges and commercial relations, commonly referred to as the "market," is essentially a product of modernity. The structures and dynamics of the modern market have been shaped by logics that sometimes reproduce exploitation, create dependency relationships, generate inequalities, and concentrate wealth. The capitalist system, based on profit-seeking and competition, aims primarily at wealth accumulation. This concentration of economic power results in social disparities, marginalization of vulnerable groups, and a tendency to exploit natural and human resources (Silva et al. 2016).

However, despite the consolidation of modernity, or possibly because of its decline, various organizations and social movements are expressing themselves not only "against" capitalism and globalization, questioning modernity, but also opening global horizons, albeit non-capitalist, unlinking from the idea that there is a single and primary modernity surrounded by other peripheral and alternative ones (Mignolo 2010).

It is in this context that the MST is created and established, which, in turn, has approached the traditional food trade market more intensively in recent years, positioning itself as an alternative in the segment. However, even though the MST emerged as a response and demand for symptoms produced by modernity and capitalism, the Movement

perpetuates and operates within this system, which is the prevailing social and economic norm.

Based on the collected data, it is possible to explore the idea that the MST does not reject capitalism, but seeks to overcome it. By developing its own strategies to ensure economic viability and strengthen its agendas, the Movement circumvents logics and negative consequences of capitalism, sometimes minimizing harm, sometimes showing that other economic models and organizations are also viable.

The MST develops strategies based on collectivity and decentralized popular management to address challenges imposed by the traditional food trade market, such as scale and agility issues. By adopting a collective approach, the MST seeks to bring together farmers in cooperatives and settlements, promoting solidarity, collaboration, and commercial professionalization. This collective organization allows for the optimization of available resources, the sharing of knowledge and skills, and joint decision-making, facilitating the response to market demands. Furthermore, decentralized popular management places decision-making power in the hands of the farmers themselves, allowing them to adapt their strategies according to local needs and contexts while feeling like active participants in this construction.

Dussel (2016) emphasizes the importance of recognizing and respecting popular culture as an essential part of the cultural and social diversity of a society. Popular culture is seen as a source of resistance and identity for these groups, allowing the affirmation of their experiences and worldviews. The popular, in this work, can be taken as the MST itself, carrying its externality, that is, its own knowledge system and principles.

In this sense, the transmodern character of the MST becomes noticeable by accessing and expanding externality in its practices. This indicates an emergence of externality, otherness, always distinct from developing universal cultures that take on the challenges of modernity but respond from another place - their own cultural experience - and are therefore capable of creating solutions completely impossible for the dominant modern culture, such as popular management (Dussel 2002).

The lack of formalized knowledge for cooperatives or other forms of economic enterprises not forged by capitalist logic creates a need for such enterprises to develop their practices, guided by their knowledge and principles. Due to the absence of established

structures and guidelines, alternative forms of economic organization are often driven to seek creative and innovative solutions aligned with their visions and values. These enterprises often have to develop their governance models, management strategies, and decision-making processes based on the specific needs and goals of the collective. For example, from WhatsApp groups of producers organizing for markets to the launch of the Armazém do Campo store, or the creation of a national office to centralize production logistics from various states and increase commercial competitiveness.

Similarly, the success indicators adopted by the MST differ from those practiced by traditional economic enterprises, as they seek to maximize collective social benefit rather than focusing solely on individual financial gains and income concentration. The MST's success indicators include the conquest and maintenance of settlements for rural workers, the promotion of agroecology, the reduction of social inequalities, and the fight against hunger. These indicators reflect a broader view of success, prioritizing collective well-being and social transformation over individual profit. Thus, the MST reconfigures traditional success metrics, aiming to achieve results that bring significant benefits to the community as a whole.

This orientation is present in the actions of the Movement, which, in this case, proposes a fusion between commercial and social interests. An evident example is traditional geomarketing studies: while in the traditional market, they exclusively aim to identify the potential of consumers; in the case of the MST, when studying the best region to open a new store or market, they map regions with more people in food insecurity that could benefit from the Movement's initiatives.

Another sensitive aspect of the management of economic enterprises, in general, is the issue of cost reduction. Everything developed by the MST aims to reduce costs, not for an increase in profit margins, but to make products more accessible to the poor and those in food insecurity, ensuring that healthy food is not a privilege of a few. If there is still a need for cost reduction, the strategy is to create a mixed product that, while not a "premium" product, still preserves nutritional quality, one of its central agendas. Overall, it can be said that MST's products come with an embedded social cost, which is generally not absorbed and tolerated by the traditional market.

Although capitalism has its role in market dysfunctions, it is the prevailing system today, and the MST does not aim to overthrow it. The MST seeks to combat agribusiness, a

system-oriented by large landholdings, exploitation, destruction of nature, and income concentration, which contributes little to the Brazilian economy. The dysfunctions of capitalism, such as exclusion, exploitation, and monopoly, are fought through a series of initiatives but are treated as harm reduction.

However, by being so close to the traditional market and its logic, by seeking to integrate and extract economic viability and opportunities for its perpetuation, the MST assumes a position that Dussel (2016) would frame as bordering, that is, connected to the tensions arising from the approach of its culture with modernity, represented here by the market. Thus, the Movement demonstrates that it is promoting an intercultural dialogue that encompasses existing asymmetries and seeks to overcome them, towards the construction of a new business reality.

In the explored literature on contested markets, tension is present as an intrinsic characteristic of the relationship between the contested actor and the traditional market (Hietanen and Rokka 2015), suggesting that strategies must necessarily be transmodern to deal with the coexistence of so many oppositions.

By presenting a transmodern market approach, circumventing both the logics and consequences of capitalism while participating in it, the MST positions itself as a viable alternative to integrate the best of modernity with the construction of cultural alterity, leading to a transmodern utopia: a pluriverse with diverse universalities, instead of a monopoly, concentration, and exclusion (Dussel 2016).

6.4 Evolution of the transmodern management model as a legitimation strategy

The MST has developed its own model of management and organization, which can be considered transmodern in the sense that this model not only adapts to existing logics but also creates its own strategies aimed at achieving results different from those produced by economic enterprises aligned with the capitalist system. The transmodern approach of the MST reflects an alternative vision to modernity while also playing a strategic role in its legitimation process within a traditional market context.

By strengthening its competitive differentiators, the MST positions itself as a viable and legitimate alternative to conventional agrarian and economic structures. Through principles such as collectivity, solidarity, environmental sustainability, and the protagonism of rural

workers, the MST seeks to create a model of production and social organization that challenges the predominant capitalist logic. This legitimation strategy within the capitalist market allows the MST to preserve and promote its values, as well as attract support and recognition from consumers.

The transmodern approach of the MST contributes to gaining the trust of consumers and society at large, as the Movement's values are evidenced by its practices and the effective communication of the achieved results. In addition to gaining broader popular support and differentiating itself in a competitive market that operates under other paradigms, the Movement strengthens its overall legitimation, specifically in the context of this work, as an economic enterprise.

In addition to the accounts collected in interviews, evidence of the MST's legitimation was observed in festive events promoted by the Movement, such as the 20th Festival of Ecological Rice Harvest, where a large number of people attended, consumed products, and proudly displayed symbols of the Movement. In addition to the significant number of visitors at the settlement where the event took place, various politicians, including councilors, deputies, and ministers, as well as personalities, such as influencers and activists, were present. The event was widely publicized on the MST's and the present personalities' social media, contributing to increased visibility and legitimation.

As consumers delve deeper into their knowledge of the MST and its principles, especially from this transmodern approach in the food trade market, their commercial loyalty is strengthened. By understanding the broader and more systemic mission of the MST, consumers develop a more significant connection with the Movement. This deeper knowledge creates a sense of identification and ideological alignment, reinforcing consumers' loyalty to the products and services offered by the MST. They recognize that by supporting the MST through their consumption choices, they are contributing to a greater cause and the positive transformation of the food system, in addition to obtaining direct and individual benefits from consuming these foods.

As a contested actor, highlighting the moral issues involved is particularly relevant for strengthening its acceptance and legitimacy. This convergence with both social and legal values enables entry and consolidation in the market. The MST demonstrates the ability to highlight its values to consumers, and the increased commercial loyalty among consumers

with greater knowledge of the MST suggests that its transmodern management model is also a legitimation and perpetuation strategy.

6.5 Role of markets in the social debate around contested actors

Markets, in general, play a significant role by serving as a platform for viability and visibility for contested enterprises, such as the MST. These enterprises often face challenges related to acceptance and legitimacy due to their positioning and claims. However, markets provide a space where these products have the opportunity to connect directly with consumers and be exposed to a broader audience, playing an essential role in providing a platform for products that might otherwise struggle to find a place in civil society in general.

Specifically in the case of the MST, this can be observed in the dynamics of the relationship between the movement and consumers. Initially, consumers come into contact with the MST when seeking organic food for personal consumption. However, as they become more familiar with the work carried out by the MST, it is common for them to experience an "expansion of consciousness" and develop a broader ideological alignment with the Movement. This deeper knowledge can lead to greater involvement, such as supporting campaigns, participating in events, or advocating for MST's causes, thus becoming activists for the Movement.

Direct interactions allow consumers to better understand sustainable agricultural practices, the social implications of food production, and political issues related to the food system. This more significant connection between producers and consumers at organic food fairs strengthens the social and political awareness of the act of consumption. It is in this context that the MST manages to promote an approach to society and, in some way, achieve greater visibility.

However, even though the MST is adept at communicating and demonstrating - perhaps due to its combative nature - the political and advocacy elements tied to its actions, these elements are intentionally worked on by the Movement. Thus, in stores and fairs, it is common to find informative materials, posters, and other visual resources highlighting themes such as land reform, agroecology, social justice, and other related issues. The visual elements and messages aim to provide a more complete and engaging experience that goes beyond the

simple purchase of food and also involves a connection with the principles and objectives of the Movement.

Through observations made at the Armazém do Campo store, it was possible to perceive that the MST consciously and strategically exposes and works on political elements in its stores, connecting them to the food trade activity. In addition to displaying posters, flags, and other visual resources with political messages and movement agendas, there is a library with books for sale, essentially focused on land reform and agroecology, as well as titles of a social-political nature. Political intentionality is also present in the choice of product names – for example, "Terra Livre," where "free" refers to the absence of poison, exploitation, and concentration – and in the visual identity of their packaging, which carries elements of a balanced nature, referencing peasant work. MST accessories are displayed for sale, such as T-shirts and caps, considered a propaganda strategy.

From the perspective of the Movement's members interviewed for this study, commercial activities are seen, above all, as opportunities to strengthen dialogue and expand the awareness of the urban working class about the MST and its agendas. In this sense, it can be inferred that markets have the potential to give voice and visibility to contested economic enterprises, or even to social movements seeking perpetuation and increased visibility in society at large. Thus, subverting existing logics in a market goes beyond having a transmodern attitude towards the enterprise; it also implies demonstrating that there are ways to transform the market itself. By showing that it is possible to transform the market, agents like the MST are engaged in an effort to reimagine and redefine economic relationships, paving the way for the creation of new forms of economic and commercial organization based on more inclusive, sustainable, and socially just principles.

7 Final considerations

Businesses can devise strategies to infiltrate a market, even if, at their core, they oppose it. The decision to infiltrate a market demands careful reflection on the possible impacts and the balance between opportunities for influence and contradictions that may arise when adopting specific entry strategies.

In the case of the MST, it becomes evident, from the accounts of Movement members and their consumers, that the prevailing strategy is to "face the lions from within the arena."

Participating in fairs, owning brand stores, having commercial partners and ordinary people wearing the red cap are considered opportunities to expand political discourse with society.

It seems to be precisely the combative nature and determination of the MST to confront challenges and press for structural changes that differentiate and legitimize it in the market, as its commercial objectives are inseparable from its identity, although it also contests it. Its values and principles are the guiding thread that ensures coherence perceived by consumers in the various actions of the Movement, whether in stores, fairs, solidarity actions, political demonstrations, or occupations.

The legitimation process of the MST is connected to the opening and strengthening of political discourse, and, in turn, these two dimensions feed each other, resulting in positive contributions to society. By participating in the traditional market with combative and engaged actions, the MST gains visibility and achieves greater recognition from the general public, generating discussions on social and environmental issues that would not spontaneously emerge in certain spaces, such as markets. These discussions fuel the legitimation process of the MST, giving it greater representativity as a spokesperson for fundamental issues in Brazilian society. As a result, the MST's actions end up influencing political agendas and contributing positively to advances in the pursuit of a more egalitarian and democratic society.

Finally, exploring the transmodern paths of entry and consolidation of the MST in the market not only contributes to the agendas and evolution of the Movement itself but can also influence the study and application of these concepts to other social movements and political actors in civil society. If all actions are political, academia should not exempt itself from this role.

Also, understanding that the relevance of academic research is measured, to a large extent, by its ability to generate real impact and contribute to the transformation of existing practices, analyzing the experience of the MST in relation to its legitimation process indicates an opportunity for other enterprises to mirror and strengthen their positions.

Furthermore, researching a social movement like the MST in the context of management and business offers a valuable opportunity to broaden the debate on alternative market logics. This investigation, in addition to enriching the understanding of the

complexities of contemporary society, also allows organizations to consider new business models that are more responsible, inclusive, and socially conscious.

Recognizing the need to deepen understanding of practices and approaches that promote a more inclusive, just, and sustainable perspective in markets and business, a suggestion for future studies is the exploration of markets as platforms that enable not only economic projects but also social projects, contributing to the construction of a fairer and more inclusive society.

References

Bardin, Laurence (2011), Análise de Conteúdo. Lisboa, Portugal: Edições 70.

Dussel, Enrique (1993), “Europa, modernidad y eurocentrismo,” Revista de Cultura Teológica, 4: 69-81.

Dussel, Enrique (2002), “World-System and "Trans"-Modernity,” Neplantla: Views from South, 3(2): 221-244.

Dussel, Enrique (2016), “Transmodernidade e interculturalidade: interpretação a partir da filosofia da libertação,” Sociedade e Estado, 31: 51-73.

Giesler, Markus and Eileen Fischer (2017), “Market system dynamics,” Marketing Theory, 17(1), 3-8.

Hietanen, Joel and Joonas Rokka (2015), “Market practices in countercultural market emergence,” European Journal of Marketing, 49(9/10): 1563-1588.

Humphreys, Ashlee (2010a), “Megamarketing: The creation of markets as a social process,” Journal of Marketing, 74(2): 1-19.

Humphreys, Ashlee (2010b), “Semiotic structure and the legitimation of consumption practices: The case of casino gambling,” Journal of Consumer Research, 37(3): 490-510.

Humphreys, Ashlee, Damien Chaney, and Karim Slimane (2017), “Megamarketing in contested markets: The struggle between maintaining and disrupting institutions,” Thunderbird International Business Review, 59(5): 613-622.

Marconi, Marina and Eva Lakatos (2006), Técnicas de pesquisa. São Paulo, Brasil: Atlas.

Mignolo, Walter (2005), “"Un paradigma otro": colonialidad global, pensamiento fronterizo y cosmopolitanismo critico,” Dispositio, 25(52), 127-146.

Mignolo, Walter (2010), “Cosmopolitanism and the de-colonial option,” Studies in Philosophy and Education, 29: 111-127.

Mignolo, Walter (2017), “Colonialidade: o lado mais escuro da modernidade,” Revista Brasileira de Ciências Sociais, 32(94): 1-18.

Miralha, Wagner (2012), “Questão agrária brasileira: origem, necessidade e perspectivas de reforma hoje,” Revista Nera, 8(9): 151-172.

Quijano, Anibal (2005), “Colonialidade do poder, eurocentrismo e América Latina1,” in A Colonialidade do Saber: etnocentrismo e ciências sociais – Perspectivas Latinoamericanas. Edgardo Lander, org. Buenos Aires, Argentina: Clacso, 107-126.

Quijano, Anibal and Immanuel Wallerstein (1992), “Americanity as a Concept, or the Americas in the Modern World-System,” International Social Science Journal, 44: 549-549.

Scott, W. Richard (2008), Institutions and organizations: Ideas, Interests and Identities. Thousand Oaks, CA: Sage.

Silva, Andrea, Leda Maria Alves, Giselly da Luz Carvalho, Maria José de Sousa, and Maria dos Remédios Beserra (2016), “Neoliberalismo e seus impactos no mundo do trabalho: transformações e desafios frente a informalidade,” Revista de Políticas Públicas, 20: 227-235.

Suchman, Mark (1995), “Managing legitimacy: Strategic and institutional approaches,” Academy of Management Review, 20(3): 571-610.

Varejo SA (2023), “Pesquisa aponta crescimento de 16% no consumo de alimentos orgânicos no Brasil em 2023” Varejo SA. Available at: https://cndl.org.br/varejosa/pesquisa-aponta-crescimento-de-16-no-consumo-de-alimentos-organicos-no-brasil-em-2023/, accessed 08 Feb. 2025.

Wallerstein, Immanuel (1974), The modern world-system I: Capitalist agriculture and the origins of the European world-economy in the sixteenth century. London, England: University of California Press.

Wanderley, Maria de Nazareth (2014), “O Campesinato Brasileiro: uma história de resistência,” Revista de Economia e Sociologia Rural, 52(Supl. 1): S025-S044.

"Nett Hier!" But have you ever seen what stickers in tourist destinations are saying? – An Exploratory Analysis

Giovanni Baldi

Abstract

Stickers, as ephemeral yet pervasive elements of urban landscapes, serve as communicative tools reflecting activism, identity, and alternative promotional strategies. While their role in political expression and countercultural discourse has been explored across disciplines, their significance in tourism destinations remains largely overlooked. This study employs walking ethnography to investigate how stickers function as grassroots activism and informal place branding in tourist destinations. Preliminary findings suggest that stickers not only act as bottom-up communicative tools but also challenge dominant marketing narratives, shaping contested urban and tourism discourses. The study contributes to macromarketing discussions on activist visual culture, alternative branding, and the socio-political dimensions of tourism marketing, positioning stickers as overlooked yet powerful markers of market resistance and destination identity.

Keywords: Tourism destinations; visual activism; stickering; place branding

Introduction

Stickers are a ubiquitous element of urban spaces worldwide, serving as tools for advertising, protest, identity expression, and affiliation with political or cultural movements (Awcock 2021). As an extension of graffiti, they often carry hidden messages that reflect social, cultural, and political discourses, making them a relevant subject of study across multiple disciplines (Coşmeleaţă 2022). Their strategic placement in high-traffic areas mirrors traditional marketing techniques, enhancing visibility and engagement (Vigsø 2010).

Despite increasing interdisciplinary interest in stickers — spanning communication studies, social geography, criminology, and cultural studies (Bodden and Awcock 2024; Vasileva 2024; Vigsø 2010) — their role in tourism remains underexplored.

Stickers function as **bottom-up visual activism**, challenging dominant **destination marketing narratives** and reflecting broader **market resistance and socio-political branding tensions**. As informal, traveler-driven interventions, they blur the boundaries between **consumer expression, subcultural activism, and alternative place branding**, aligning with

perspectives on contested markets and ideological consumption (Cammarota et al. 2024; Korschun et al 2020; Koch 2020).

This ability to inscribe meaning onto urban space positions stickers as both artifacts of travel and instruments of place identity, often countering mainstream tourism discourses. Using the assumption that place is socially constructed (Scollon and Scollon, 2003), tourist destinations emerge as particularly relevant sites for investigation.

While previous studies have examined stickers as tools of protest against overtourism and environmental degradation (Cresswell, 2015; Kasanga, 2014; Kreil, 2021; Paredes-Rodriguez and Spierings, 2020), they have not been systematically analyzed in relation to their broader role in shaping destination narratives. Understanding how stickers contribute to the semiotic landscape of destinations can provide deeper insight into how informal visual culture interacts with tourism, challenging conventional marketing and place management strategies.

This study explores the characteristics and themes of stickers in tourist destinations through a walking ethnography approach with photographic documentation (Coșmeleaţă, 2022), drawing on semiotic and social science methodologies (Reershemius, 2019). By doing so, it offers new perspectives on how grassroots visual culture engages with place identities and contested narratives within tourism spaces, while also providing a methodological contribution to tourism literature.

Literature Background

Stickers have become a significant form of visual discourse in urban spaces, evolving from graffiti and street art into a medium for identity expression, protest, and subcultural communication (Awcock 2021; Vasileva 2024). Unlike graffiti, stickers offer a low-risk, easily reproducible alternative that allows for rapid and widespread dissemination of messages, making them particularly effective in shaping urban narratives and fostering countercultural discourse (Bodden and Awcock 2024). Their accessibility and portability enable them to transcend national and linguistic barriers, contributing to the visual fabric of cities across the globe.

Scholars across disciplines—including communication studies, social geography, and criminology—have examined stickers as rhetorical tools, political statements, and branding mechanisms (Hill 2024; Reershemius 2019). They have been analyzed in the context of public

space contestation, grassroots activism, and social movements, often functioning as tools of resistance against dominant ideologies (Demarmels 2016; Kasanga 2014). Beyond activism, stickers have also been explored in relation to place-making processes, urban aesthetics, and their role in fostering alternative communities within cities (Bodden and Awcock 2024; Cresswell 2015). Their integration into urban landscapes positions them as both ephemeral and enduring markers of collective memory, capable of preserving or challenging dominant socio-political narratives over time.

Stickers are inherently linked to travel, as many of their creators are visitors or transient artists who use them to leave a mark, communicate with other travelers, or engage with local cultures (Wearing et al. 2009; Yang et al. 2020). In this way, they function as artifacts of mobility, documenting the presence and interactions of individuals who contribute to the semiotic layering of urban environments. However, while stickers have been acknowledged as protest tools in tourism-related debates — particularly in critiques of overtourism and the environmental impact of travel (Kreil 2021; Paredes-Rodriguez and Spierings 2020) — their broader implications for tourism studies remain largely unexplored.

Methodology

This exploratory and preliminary study employs a walking ethnography approach combined with photographic documentation (Reershemius 2019; Vasileva 2024) to examine the role of stickers in the visual discourse of tourist destinations. This method, widely utilized in tourism studies (Witte et al. 2023), allows for an immersive exploration of urban spaces, capturing how stickers are placed, layered, and engaged with in public environments. Grounded in the understanding of space as a socially constructed entity (Cresswell 2015) and the contextual significance of signs and symbols (Scollon and Scollon 2003), this approach facilitates an in-depth analysis of stickers as communicative and rhetorical artifacts that contribute to the semiotic landscape of destinations.

The fieldwork spanned from November 2023 to December 2024, beginning in New York City—the location where initial curiosity about the phenomenon emerged—followed by systematic investigations in Athens (August 2024), Bern (September 2024), Munich (October 2024), and Fuerteventura (December 2024). These preliminary observations provided a broader understanding of sticker distribution, recurring themes, and their role in shaping

socio-cultural and tourism-related narratives. In total, 70 photographs were taken, documenting 110 stickers, which were manually analyzed to offer an initial assessment of their function within tourist destinations.

Preliminary findings

The stickers encountered during the walking ethnography across different cities reflect the socio-cultural landscape of each location, illustrating how urban diversity, artistic movements, and traveler flows shape visual discourse. In large, multicultural cities with strong university and arts communities, such as New York City, sticker culture is particularly dense, with urban fixtures—lamp posts, traffic signs, trash bins, and benches—covered in layers of overlapping stickers. This supports previous research suggesting that urban heterogeneity fosters a rich and dynamic visual culture, where stickers act as both identity markers and public discourse tools (Awcock 2021; Reershemius 2019). Similarly, in Bern, the high concentration of stickers along major thoroughfares suggests a convergence of cultural influences, likely linked to the city's international population and transient visitors. The prevalence of stickers in these urban environments reinforces the idea that they thrive in spaces characterized by high mobility and cultural exchange, supporting arguments that urban semiotic landscapes are shaped by diverse socio-political expressions (Scollon and Scollon 2003). By contrast, Athens exhibits a greater prevalence of graffiti and politically charged slogans, often with ironic undertones referencing the city's economic crisis and critiques of German economic dominance. This aligns with broader trends in visual resistance culture, where street art and sticker activism emerge as reactions to socio-political challenges (Kasanga 2014; Paredes-Rodriguez and Spierings 2020). Munich, observed during Oktoberfest, showed a high density of stickers related to sports fandom and commercial branding, reflecting the intersection of tourism, mass events, and local identity formation. In Fuerteventura, stickers were concentrated in tourist hotspots rather than dispersed throughout the city, reinforcing the idea that sticker presence correlates with traveler movement and cultural intersections. Their absence in non-touristic areas suggests a strategic placement linked to high-traffic zones, where visibility and audience engagement are maximized, supporting prior research on the deliberate positioning of urban semiotic markers (Vigsø 2010).

The stickers documented in this study predominantly fall into four thematic categories: (1) **artistic and graffiti-related stickers**, often with anonymous or untraceable authors, highlighting the intersection between street art and sticker activism, as shown in fig. 1 (Vasileva 2024); (2) **socio-political activism**, covering both long-standing and contemporary issues, ranging from environmental activism to anti-establishment messages and local political discourse, as shown in Fig. 2 (Kasanga 2014; Paredes-Rodriguez and Spierings 2020); (3) **sports fandom**, with a significant presence of football fan group stickers, ultras, and club affiliations, reinforcing previous findings that link stickers to territorial identity and subcultural dynamics, depicted in Fig. 3 (Papoutzis et al. 2014; Reershemius 2019); and (4) **promotional stickers**, advertising local businesses, events, and alternative cultural initiatives, suggesting that stickers also function as an informal yet effective marketing tool in urban settings, as shown in Fig. 4 (Bodden and Awcock 2024).

A particularly notable finding is the widespread appearance of a sticker from Baden-Württemberg, Germany, in all surveyed cities except New York. The sticker, shown in Fig. 5, featuring the phrase *"**Nett hier! Aber wart ihr schon mal in Baden-Württemberg**?"* ("Nice here! But have you ever been to Baden-Württemberg?"), is part of a tourism campaign initiated by the local tourism board in Baden-Württemberg. Designed as a playful and unconventional branding strategy, the sticker leverages humor and ubiquity to spark curiosity and engage travelers in an organic, word-of-mouth manner. Its presence across multiple cities exemplifies how sticker culture can be strategically harnessed for destination promotion, offering an alternative to traditional tourism marketing approaches (Cresswell 2015; Scollon and Scollon 2003). This case reinforces the argument that stickers are not just spontaneous visual markers but can also function as intentional tools of place branding, subverting conventional top-down promotional strategies (Paredes-Rodriguez and Spierings 2020).

Overall, these preliminary findings suggest that stickers are integral to the visual discourse of tourist destinations, embedding socio-political, cultural, and commercial narratives into urban spaces. Their presence is shaped by traveler movement, subcultural engagement, and strategic placement in high-traffic areas, reinforcing their role as an alternative communicative medium within urban environments (Bodden and Awcock 2024; Reershemius 2019). This study highlights the need for further research into the relationship

between sticker culture and tourism, particularly in understanding how stickers contribute to place identity, traveler interactions, and contested urban narratives.

Fig. 1 - Artistic and graffiti-related stickers in NYC



Fig. 2 - Social and political stickers in Switzerland



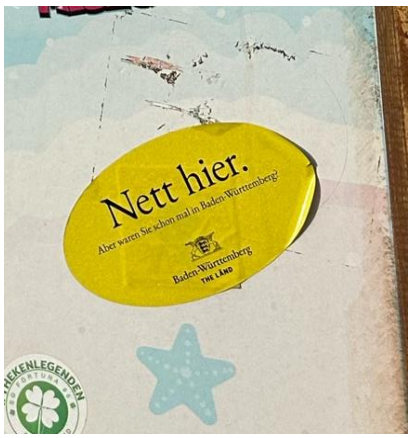
Fig. 3 - Promotional stickers



Fig. 4 – Football-related stickers



Fig. 5 – Baden-Württemberg Tourism Campaign



Conclusions, implications, and future research

Stickers represent a **form of socio-political brand activism,** providing **alternative narratives of place** and revealing **bottom-up market influences** on tourism and urban identity. They serve as **expressions of consumer resistance, non-traditional place branding,** and **grassroots activism,** reinforcing their role in **macromarketing debates on political discourse, branding, and subversive market strategies** (Cammarota et al 2024; Korschun et al. 2020; Koch and Ulver 2022). Their presence in urban environments appears shaped by traveler movement, socio-political discourse, and local cultural dynamics, positioning them as an overlooked yet meaningful element in tourism studies. Functioning both as spontaneous expressions and strategic interventions, stickers contribute to the contested visual landscape of destinations, embedding subcultural narratives within the urban fabric.

Theoretically, this study extends discussions in urban semiotics and tourism by considering stickers as a form of place-based communication, reflecting dissent, community identity, and cultural narratives. Practically, it suggests that destination managers and urban planners could benefit from recognizing sticker culture's role in shaping visitor perceptions and engagement. Witten's unconventional sticker campaign exemplifies how grassroots marketing can complement traditional branding, fostering organic, traveler-driven interactions with destinations. Rather than mere visual clutter, stickers may serve as alternative, bottom-up place narratives that coexist with official tourism discourses.

Future research should further investigate sticker culture within tourism through comparative studies of high-traffic destinations with similar characteristics, assessing how these visual markers evolve across different urban and touristic contexts. Additionally, examining the interplay between sticker activism and urban governance would provide deeper insights into how policies shape the narratives embedded in public space, advancing understanding of tourism's role in the symbolic construction of place.

References

Awcock, H. (2021). Stickin'it to the man: The geographies of protest stickers. *Area*, *53*(3), 522-530.

Bloch, L. R. (2000). Setting the public sphere in motion: The rhetoric of political bumper stickers in Israel. *Political Communication*, *17*(4), 433-456.

Bodden, S., & Awcock, H. (2024). Stuck up, peeled off, covered up, shared and scribbled out: Doing ordinary politics with political stickers. *GeoHumanities*, 1-19.

Cammarota, A., Avallone, F., Marino, V., & Resciniti, R. (2024). Taking a stand or standing aside? How to conceptualize the emerging phenomenon of university activism. *The International Journal of Management Education*, *22*(3), 101014.

Coșmeleaţă, V. A. (2022). " Glued to the city". Urban semiotics and political ideology in Bucharest's stickers. *Journal of Comparative Research in Anthropology & Sociology*, *13*(2).

Cresswell, T. (2015). Place. An Introduction. 2nd ed. Oxford: Wiley-Blackwell.

Demarmels, S. (2016). Posters and placards. *Protest cultures: A companion*, 233-242.

Hill, S. (2024). Frequency and distribution of protest stickers. *GSA-Graffiti and Street Art*, *2*(1), 32-45.

Kasanga, L. A. (2014). The linguistic landscape: Mobile signs, code choice, symbolic meaning and territoriality in the discourse of protest. *International journal of the sociology of language*, *2014*(230), 19-44.

Koch, C. H. (2020). Brands as activists: The Oatly case. *Journal of Brand Management*, *27*(5), 593-606.

Koch, C. H., & Ulver, S. (2022). Plant versus cow: conflict framing in the ant/agonistic relegitimization of a market. *Journal of Macromarketing*, *42*(2), 247-261.

Korschun, D., Martin, K. D., & Vadakkepatt, G. (2020). Marketing's role in understanding political activity. *Journal of public policy & marketing*, *39*(4), 378-387.

Kreil, A. S. (2021). Visual protest discourses on aviation and climate change. *Annals of Tourism Research Empirical Insights*, *2*(1), 100015.

Papoutzis, L., Christodoulou, A. C., Fotopoulos, N., Kyridis, A., & Vamvakidou, I. (2014). *Football stickers and slogans as creators of 'special'identities. The case of Aris FC Thessaloniki* (No. IKEEART-2014-1959, pp. 665-684). Aristotle University of Thessaloniki.

Paredes-Rodriguez, A. A., & Spierings, B. (2020). Dynamics of protest and participation in the governance of tourism in Barcelona: a strategic action field perspective. *Journal of Sustainable Tourism*, *28*(12), 2118-2135.

Reershemius, G. (2019). Lamppost networks: stickers as a genre in urban semiotic landscapes. *Social semiotics*, *29*(5), 622-644.

Scollon, R., & Scollon S.W. (2003). Discourses in Place: Language in the Material World. London: Routledge.

Vasileva, N. (2024). St. Petersburg as a place of belonging: Sticker artists inhabit and imagine the city. *Space and Culture*, *27*(4), 459-472.

Vigsø, O. (2010). Extremist stickers: Epideictic rhetoric, political marketing, and tribal demarcation. *Journal of Visual Literacy*, *29*(1), 28-46.

Wearing, S., Young, T., & Stevenson, D. (2009). Tourist cultures: Identity, place and the traveller.

Witte, A., Wilson, J., Burrai, E., & Dashper, K. (2023). Navigating tourism ethnographies–fieldwork embroiled in time, movement and emotion. *Current issues in tourism*, *26*(9), 1394-1408.

Yang, I. C. M., French, J. A., Lee, C., & Watabe, M. (2020). The symbolism of international tourism in national identity. *Annals of Tourism Research*, *83*, 102966.

"What, me worry?"—Exploring the need for regulation to address uncertainties around generative artificial intelligence

Alex Reppel

Julie Stanton

Stefanie Beninger

Forrest Watson

Abstract

This study utilizes more than a year of media coverage of generative artificial intelligence (GenAI) to illustrate the fervent call by experts, journalists, citizens, policymakers, and others to address the implications and uncertainty surrounding GenAI. This call illustrates the range of concerns and interests expressed as to how GenAI impacts personal and professional settings, as well as society at large. Building from a comparison with the slower, but similarly pervasive, spread of social media, this paper analyzes the reaction to the launch of GenAI using the lens of social constructivism. Emerging from the analysis, the paper concludes avenues for appropriate response at multiple levels of policymaking that account for the ongoing creation, uses, and outcomes of GenAI. The policies, leaning on proposals for systematic, systemic and radical transparency, should aim to prevent the degree of negative impacts that were allowed to occur in the case of social media, while retaining the powerful marketing innovations possible with GenAI. Novelly, this study employs the use of free/open-source generative AI in its methods, thereby also contributing to understanding how this technology can be used in marketing scholarship.

Acknowledgements

The team acknowledges the support received from Digital Taxonomy Ltd., including the use of the CodeIt platform free of charge.

Introduction

Marketing has long explored the (policy) implications of emerging technologies, including, for example, telemarketing (Foxman and Kilcoyne 1993), database marketing (Milne 2000), the Internet (Stewart and Zhao 2000), online covert marketing (Ashley and Leonard 2009), robots (Mende et al. 2019; Grewal et al. 2020), and drones (Beninger and Robson 2020;

Khan et al. 2019), among others. Macromarketing is concerned with understanding societal implications of technology (Hill and Dhanda 2006). Recently, artificial intelligence (AI), broadly understood as an attempt to simulate humans (e.g., Lieto et al. 2018; de Kleijn et al. 2017), is increasingly being employed in—and impacting—many areas of society. AI has widespread consequences and opportunities for marketing (De Bruyn et al., 2020; Huang and Rust 2021; Vlačić et al., 2021).

A specific type of AI, "generative AI" (GenAI) has been defined as "a technology that (i) leverages deep learning models to (ii) generate human-like content (e.g., images, words) in response to (iii) complex and varied prompts (e.g., languages, instructions, questions)" (Lim et al., 2023 p. 20). GenAI is a departure from previous AI, which relied on pre-determined responses based on pattern recognition, in that it not only responds but also generates new content (Lim et al. 2023), including text and images. Therefore, while recent research in marketing has contributed to our understanding of AI (e.g., Davenport et al. 2020; Liu-Thompkis et al. 2022; Guha et al. 2021), this paper focuses on GenAI. Like all new technologies, GenAI brings with it a wealth of implications—both positive and negative—that are worthy of attention.

Researchers in marketing have a responsibility to explore the impacts of new technologies, including their potential to bring benefits, but also their (public and private) risks, while answering how we can best manage such risks (Hoffman et al. 2022). At the same time, in marketing, there is an "increased awareness that businesses must consider carefully how customers and society might be affected by the adoption of digital technologies," requiring research around the wider implications of technologies (Plangger et al. 2022, p. 1125). Research at the nexus of public policy and marketing has an opportunity to explore the tensions between technologies and their implications in order to protect and enhance society's rights and well-being (Andrews et al. 2021), aligning with wider goals of marketing.

While privacy is a major concern of many new technologies in marketing, risks associated with GenAI have included a range of issues such as causing job displacement and copyright infringement, among others. To date, however, specific policies—at the organizational and wider governance levels—are largely lacking, presenting us with an opportunity to ensure that appropriate policies are considered and created as soon as possible (Grace et al., 2024, in pre-print). Hence, there is a pressing need for marketing to identify and

explain the unfavorable effects and risks associated with GenAI (Andrews et al., 2023; Kees and Vallen, 2024). As a technology, GenAI is transforming the use of information for a broad array of applications – within and beyond marketing – akin to the way that the steam engine and nuclear fission transformed practices in transportation and energy generation, with rippling implications for many other areas of life—both positive and negative. It is thus imperative that we properly study its potential impacts. Without this research and its resulting understanding of its implications for society, and ultimate policy development, the outcomes of such a new technology could be devastating.

Social Media as Context

The context of social media offers a compelling example of how policy has not met the challenge. Twenty years have passed since Facebook (now Meta) was launched, and many other platforms have arisen alongside and since then. Early studies and commentaries around social media usage focused on the privacy of employees whose companies might utilize their staff's social media activity as an evaluative tool (Mello, 2012; Karlen, 2014). Later analyses of privacy considerations recognized the dangers of users' location information being shared, leading potentially to burglaries and other violent actions (Haynes, Bawden and Robinson, 2016). Privacy breaches increased the vulnerability of children and teens to cybercrimes, with potential implications for not only their safety but also future college acceptances, employment, and other goals (Maitland and Lynch, 2020).

While privacy was the initial focus, a vastly wider array of consequences have emerged from the literature, particularly for younger users of social media platforms, including loss of perceived well-being (Anderson et al., 2023) and sleep quality (Graham et al., 2021), and increases in loneliness (O'Brien et al., 2023), anxiety (Lambert et al., 2022), depression (Apoorva A. et al., 2022; Rosenthal and Tobin, 2023; Sundvik and Davis, 2023), human trafficking (Gezinski & Gonzalez-Pons, 2022) and even suicides (Braghieri, Levy and Makarin, 2022). Additionally, social media has become a place rife with misinformation, and interactions on social media can further entrench misinformed viewpoints and create echo chambers (Diaz Ruiz and Nilsson, 2023). In the face of such negative outcomes, analysts pointed to widespread regulatory failure in protecting against the impacts of social media usage, even when privacy concerns were openly dismissed by Facebook's founder (Karlen,

2014). When it comes to GenAI, there is still an opportunity to preemptively avoid some of the policy failures related to social media.

With the goal to "drive positive change for people and society" (p. 1), our research contributes to the call for more research needed in public policy and marketing in the face of the rapidly evolving technology of AI (Kees and Vallen, 2024). In order to capture the recency of the technology, this paper utilizes media coverage of GenAI since the public release of a leading version, OpenAI's ChatGPT, in late 2022. As media plays "a central role in informing the public about what happens in the world, particularly in those areas in which audiences do not possess direct knowledge or experience" (n.p.) and directly impacts public debate on key topics, including influencing attitudes and setting (policy) agendas (Happer and Philo, 2013), investigation into the media discourse is an appropriate approach when considering GenAI. The vast majority of consumers and policymakers have little direct knowledge about the far-reaching implications of GenAI due to its recent and rapid adoption, its unique capabilities, and its relative technological complexity. This paper is therefore guided by these focal research questions: What is the media discourse about the implications of generative AI, and what are the implications for public policy?

To answer these questions, we conducted an analysis of media articles from four major American and European news outlets in the months following the explosion of GenAI in the public realm (beginning in October 2022), drawing on free/open-source large-language models (LLMs) to help us in our analysis. Our analysis reveals that there is widespread uncertainty around the usage and anticipated implications of GenAI, and identifies underlying tensions around key areas, namely the impact on human work at organizations, the impact on human life for individuals, and the impact on wider human society into the future. This uncertainty is driven by two main contributing factors: the nature of the technology itself and the application of tools it offers. Suggestions on ways forward, including actions by technology companies, the public sector, and users are provided. Our findings lead us to our main contributions: We provide a theoretical framework of the tensions related to the advent of GenAI and the touted possible solutions to managing those tensions as portrayed in the media, ultimately offering important policy implications for GenAI.

In what follows, we first explore the academic literature on GenAI and then describe the theoretical lens that shapes how our research seeks to add meaningful understanding of

how GenAI impacts the world around us. We then present our methodology and findings. A discussion of how those findings reflect the nature of policy making about GenAI is then offered, followed by conclusions and limitations of the research.

Understanding Generative Artificial Intelligence

With the introduction of generative AI, by way of OpenAI's ChatGPT, to the wider public in November 2022, the rate of consumer adoption has been startling. During its first week, over one million people used the new technology (Stokel-Walker, 2022). Major factors contributing to the rapid pace of GenAI's adoption is that it is relatively cheap or even free, easily available, easy to use, and easy to customize (Kshetri et al., 2023), all factors which will continue to drive its adoption. As with widely adopted technologies of the past, GenAI has the potential to radically change how people think about its value, and thus when and where to use it. While research on GenAI is just emerging, recent scholarship has pointed to its potential benefits and drawbacks in the marketing and larger business contexts.

Perceived Benefits

A commonly perceived benefit associated with use of GenAI is increased productivity levels, particularly regarding repetitive work, with improved accuracy of tasks and quick access to information expected even for knowledge-based workers (Dwivedi et al., 2023). McKinsey & Company estimates that 50 percent of work activities conducted today could be automated between 2030 and 2060 (Chui et al., 2023). Associated productivity gains are estimated to be in the trillions of dollars, and greatest in customer operations, marketing, and sales (Chui et al., 2023). In this way, "[m]achines thus seem ready to replicate the work of our minds, and not just our bodies" (De Cremer and Kasparov, 2021, n.p.).

For marketers, there are indications that GenAI could not only save time and costs, but also help create personalized experiences, conduct real-time market research, and easily generate marketing ideas and content (Kshetri et al., 2023). Indeed, GenAI could be used for product development (Bouschery et al., 2023) or to collect "synthetic consumer data" and therefore serve as a "substitute for human participants in market research" (n.p.), such as when assessing brand perceptions (Li et al., 2023). A study by Brand et al. (2023), not yet peer-reviewed, tested how ChatGPT (version 3.5) would react to consumer survey questions, for which training data included messaging boards and review systems that include consumer behavior. Results indicated that it responded in a way that is consistent with patterns expected

in consumer behavior on aspects such as willingness-to-pay and preferences related to certain customer attributes, prompting the authors to surmise that GenAI could potentially be used to give low-cost and quick insights into consumer preferences—a kind of indirect or early-stage survey.

Perceived Drawbacks

While GenAI has its upsides, the drawbacks have also been noted in academic literature. For example, GenAI can provide false information. Such fabrication incidents can occur because of training inaccuracy or complexity, among other causes, including the nature of GenAI itself, but these 'mistakes' can have far-reaching outcomes, including contributing to the spread of misinformation and biases, and making mistakes in crucial services (e.g., healthcare provisioning) (IBM, 2023). The rampant lack of transparency about how GenAI produces its output further complicates our ability to determine the accuracy of the provided information (Dwivedi et al., 2023). Solutions to concerns around misinformation include using quality training data, carefully articulating the purpose of the GenAI, providing boundaries on the provided output, testing the system frequently, and ensuring human oversight (IBM, 2023). Despite these (imperfect) potential solutions, it is important to note that these hallucinations will likely never completely disappear, given the nature of the technology being a probabilistic model (Levy, 2024). Further, nefarious actors can also seek to manipulate the input data, resulting in increased incidences of misinformation or bias (IBM, 2023).

Such bias in the data raises concerns (Adiguzel et al., 2023) and could negatively impact consumers (Hoffman et al., 2022). It can take the form of data bias (i.e., that the training dataset is not representative or is otherwise inadequate), method bias (i.e., activities—specifically the methods—used to design and deploy AI can have biases) or societal bias (i.e., biases arising socially and historically) (Akter et al., 2021). Rather than thinking of intelligent technologies as inherently unbiased or neutral, we must realize that actually-existing intelligent technologies, that 'learn' to find patterns in data of human observations, act more as a mirror that reflects—and indeed, amplifies—both our most moral and prosocial traits, as well our flaws and biases. (p. 1040). As a result, GenAI may create overgeneralizations in its outputs, could cause harm to different groups, and lead to discriminatory outcomes (Akter et al, 2022).

Misinformation and bias in the data are concerning, but so is data security related to GenAI, especially for marketers. Privacy concerns related to GenAI include issues around privacy of their customers' data and how customers will view its use by marketers and their respective companies (Kshetri et al., 2023). Data are already increasingly vulnerable with a greater sharing of sensitive data online (Brough & Martin, 2021), which underscores the urgency of unpacking such concerns. Relatedly, scholars caution that it is not only about how collected data will be used, but also what data the GenAI was trained on and whether that process infringed on people's privacy (Dwivedi et al., 2023).

While the above-mentioned issues are alarming when considering that GenAI is being used to execute specific tasks, it is worrying given that managers are not only outsourcing work to GenAI technologies, but also decision-making. Recent scholarship has pointed to concerns that managers are increasingly delegating decisions—even ethical decisions—to GenAI, and they are doing so while not considering what negative, even dangerous, consequences might arise because of this delegation (De Cremer & Narayanan, 2023):

[T]here remains a real risk that ethics and responsibility-taking itself will be automated. This is an important yet dangerous development, as it means that the business world will be—and already is, to a great extent—affected by a mindset of 'technosolutionism': where intelligent technologies are seen as the ultimate tool for 'solving' complex social and ethical problems, if only enough data and the right kinds of technology were made available … (p. 1039)

These authors concluded that managers need to not only make technical improvements to their systems, such as reducing bias, but also receive training regarding the moral dilemmas of GenAI to allow them to make more responsible and stakeholder-centric choices (De Cremer and Narayanan, 2023, p. 1040).

Delegation of decisions to technology is especially likely if they are viewed as being even "better than humans" in part due to their "rational, unemotional, and consistent ways" (Dee Cremer & Narayanan, 2023, p. 1038) and where managers see it as easier to tackle the shortcomings of a technology than to train or teach humans. Such a move to replace — rather than support — humans could prove problematic as it remains difficult for humans and technology systems alike to identify whether content is produced by humans or GenAI. For example, Gao et al. (2023) found that it was difficult for human reviewers, even those with

expertise on the content (in this case scientific abstracts), to accurately identify text generated by ChatGPT. In the setting of education, educators are struggling to ascertain whether information is produced by students, or indeed copied from text generated by AI, especially as the GenAI can produce appropriate, elaborated answers (Lim et al., 2023).

Relatedly, a precaution raised by Banker and Khetani (2019) in the context of online consumer ratings is also of concern for GenAI: specifically, the authors found a tendency toward 'algorithm overdependence' in which consumers can harm their own well-being by believing these systems more than believing other valid product-related indicators. With the ubiquity of GenAI, the threat of algorithm overdependence is even higher. For example, an overdependence on the technology could erode the system of education and the ability of students to learn critical thinking skills (Maboloc, 2023). Indeed, a blind over-reliance on GenAI leaves the user vulnerable to misinformation—or hallucinations—provided by the AI.

While these drawbacks would have dire implications, there is an even larger, existential threat of GenAI noted in the emerging literature, including that it may lead to human extinction. While this sounds hyperbolic, a fall 2023 survey by Grace et al. (2024, in preprint) found that, of 2,788 surveyed leading AI researchers, "between 38% and 51% placed at least 10% chance on advanced AI bringing these extinction-level outcome" (n.p.) (while a previous iteration of this survey in 2022 on a similar sample put this risk at a 5%). As they concluded, "[w]hile the optimistic scenarios reflect AI's potential to revolutionize various aspects of work and life, the pessimistic predictions—particularly those involving extinction-level risks—serve as a stark reminder of the high stakes involved in AI development and deployment." (n.p.).

In sum, emerging research indicates there are many reasons to be mindful of how GenAI has impacted and will continue to impact our everyday lives. Enjoying productivity gains in the short-run and not attending to the array of negative implications can leave us with undesirable outcomes, as the example of social media has shown. It is thus imperative that we step back and consider a more complete set of possible implications and construct the guardrails needed to protect ourselves appropriately. Since public discourse—as depicted in the news media—tends to reflect the social construction of our understanding, concerns and goals related to new technologies such as GenAI, and therefore actively influences policymakers (as well as consumers and marketers), we propose an analysis of that discourse in the hope of supporting effective and consensus-oriented policy approaches.

Theoretical Approach

To frame our research, we utilize the theory of social constructivism to reflect that the value of technology, and particularly GenAI, is socially constructed. Social constructivism posits that understanding, significance, and meaning are developed in coordination with other human beings. As social beings, humans construct their own realities through interactions with each other (Mead, 1934). In other words, what we take for granted is often socially constructed. Berger and Luckmann (1966) brought the term "social construction" into the mainstream of sociology decades ago. Social constructivism has been applied widely, including in investigating how policy diffuses and becomes accepted (Dobbin et al., 2007).

Social constructivism helps explain how understandings and corresponding actions develop in society:

> All social constructions are constituted in the understanding that their constituents have of it and enact. Public opinion is no exception. It is constituted in concepts of public opinion for which numerous institutions compete—advertising, public relations, the mass media, politics, journalism, and last but not least the science of polling—each pursuing its own interests in shaping the concept of public opinion in its favour, and each relying on pollsters, social researchers, and relevant media to record and publicize it (Krippendorff, 2005).

It is noteworthy that 'numerous institutions compete' to shape public opinion, including social researchers and the media. Media has a notable influence on our constructed realities. The seriousness and urgency people feel towards social problems is based on their perceived prevalence, which is influenced by sources of information such as media (Briley, Shrum, and Wyer, 2013). A classic and pertinent example of a constructionist approach is the study of nuclear power (Gamson and Modigliani, 1989), in which media discourse and public opinion are shown to be intertwined. The public discourse, as reflected in the media, is especially important given its accessibility to consumers and policymakers. For example, media such as television can play an influential role in consumer socialization and the construction of consumer reality, where such representations both situate and frame our behavior, including that of consumers (O'Guinn and Shrum, 1997).

By analyzing news media articles, we get a window into how the meanings and consequences of GenAI are socially constructed. The same can be said regarding the shaping

of policy, where "media accounts can play a central role in not only legitimizing certain courses of action, but the placing of trust and credibility in particular versions of the possible directions for social policies" (Harper and Philo, 2013, p. 333). Indeed, for a technological innovation that feels accessible, commonplace, and familiar, as has quickly occurred with ChatGPT, discourse through the news media may be more fitting and prevalent than in the case of the larger AI realm where the technology's functionality is perceived as opaquer.

Given this, we explore the coverage of GenAI in news media articles. If indeed there is evidence of a strong emerging view on the impacts of GenAI and hence a need for policy response, this approach will identify what could be the most acceptable and immediate actions that could be taken. A second value of this analysis is that it could highlight the quickly forming consensus about regulating GenAI, in contrast to a slower, limited response to warnings raised about social media in its early days. That is, illustrating where public discourse has intensified or matured in its understanding of the impacts of GenAI, especially in the relatively short period of time since its public launch, provides a strong rationale for immediate policy action.

Methodology

When it comes to an emerging technology with the potential to profoundly impact society, many will look to reputable media sources for insights and direction. Consequently, to explore the public discourse on the potential impact of GenAI—both positive and negative—and how policymakers should respond, we analyzed more than a year of news media articles from leading American and European media outlets. Given that GenAI is 'new to the world,' these outlets are likely an important source of knowledge for policymakers and directly influence the broader public discourse on the topic. Additionally, marketing research should account for diverse stakeholder perspectives, with media being a significant stakeholder. Our analysis of news media articles was conducted between December 2023 and March 2024 and consists of two separate but intertwined studies, which we detail below.

Approach

To achieve our aims of examining the wider implications of GenAI, which include its beneficial uses in research, we use free/open-source large-language models (LLMs) to support our analysis of the news media articles. This application of GenAI allowed us to extract potentially relevant sections from each article and to add more articles as they are published.

The process potentially provides for a greater speed than if left up to individual human researchers, such speed being crucial given the rate of change of GenAI.

Our approach differs from the use of more powerful commercial GenAI tools, such as ChatGPT, for automation of data analysis. For example, De Paoli (2023) conducted an experiment to automate inductive thematic analysis (e.g., Braun and Clarke, 2006) of semi-structured interviews. In contrast to these and similar approaches drawing on commercial GenAI, we used free/open-source models installed locally to ensure that data were not shared beyond the local machine. We consider local storage to be an important guardrail for using LLMs for confidential research data. In our case, this ensures that information related to our query would not be accessible to a commercial GenAI tool; including articles we downloaded from news outlets, all of which were protected by a paywall (though accessible through our university licenses). Accepting the much slower processing speed of our local system running on consumer-grade hardware was thus a necessary tradeoff. Moreover, none of the LLMs we experimented with were optimized and/or further trained for this specific task. Consequently, we believe it will be straightforward for other researchers to reproduce our process, or to adapt it for other purposes, including the processing of confidential research data.

Data Collection

The media outlets used in both studies were the *New York Times, Financial Times*, *Washington Post,* and *The Economist*. These outlets provide balance between American and British perspectives and a mix of mainstream political, business, and technology news. Data were collected through the following process: First, each media outlet was searched for the term 'generative A.I.,' with a starting date of October 1, 2022. We chose this start date as it was just prior to the public access to ChatGPT in November 2022, arguably the GenAI program that more than any other thus far that has captured public imagination and use. Second, we limited the selection of articles to full-text articles, excluding media items. Third, we saved each article in HTML format for further analysis. This facilitated our use of free/open-source LLMs to extract potentially relevant sections from each article.

The process of extracting content from media articles was fully automated. First, the LLM was instructed to break each article into digestible chunks of several sentences. While the need to split large text into smaller parts may also be necessary when using commercial GenAI tools in certain conditions (for a demonstration, see, e.g., De Paoli, 2023), reducing the

size of those parts is necessary when using free/open-sourced models running on consumer-grade hardware due to processing limitations. Second, the LLM was instructed, by separate—and carefully constructed—prompts, to analyze the article fragments on several topics. Following best practice, we experimented with different variations of each prompt before choosing those that returned the most meaningful extractions across the dataset.

Two further quality checks were conducted. First, we started with using several different LLMs, which allowed us to compare answers for the same chunk across models. Accordingly, we identified the best performing LLM in terms of consistently recognizing meaningful text without missing important sections. Second, to prevent LLMs from hallucinating and extrapolating beyond the text, we made an important adjustment to the configuration of each model. Namely, we set their 'temperature' to zero, meaning they were not to interpret what they found in each chunk. Moreover, models were instructed to provide exact quotes, if something relevant was found, or a null response if not.

This process was used in two studies. In the first study, we asked the LLMs to identify any positive or negative consequences associated with GenAI. This was followed by a second study where we asked the LLMs to identify any suggestions or action steps mentioned in the articles regarding GenAI, with specific prompts looking for private sector actions distinctly from regulatory actions.

Study 1: Benefits and drawbacks of GenAI

An initial dataset of n=264 articles was compiled in December 2023 consisting of articles from all four media outlets. Each article mentioned the term 'generative A.I.' and was published between October 2022 and December 2023. As building this dataset required that the authors manually save and organize each article in HTML format before providing them as input to the LLMs, this was not an exhaustive set of all articles from the period.

As part of the data collection process, the author team tested the process of automated content extraction multiple times, seeking refinement of 'prompts' to where the extracted content was considered highly relevant to the study aims. We then narrowed the LLMs to the two that provided the most comprehensive and meaningful output. Subsequently, two of the authors manually coded 20 randomly selected articles and compared the results to both LLMs, resulting in the selection of the *Neural Chat*[1] LLM for the remainder of our data extraction.

An inductive thematic analysis (Braun and Clarke, 2006) was conducted on the data extracted by the *Neural Chat* LLM. Manual analysis was completed by the two authors already familiar with the data through the previous step of selecting the best performing LLM. Utilizing the *CodeIt*[1] platform, the lead author engaged in coding of the chunks, ultimately creating a coding table. Three authors (including the lead author) organized these codes into higher order categories, recognizing that uncertainty was a prevailing theme in the data. The three authors, through an iterative process of refining and collapsing these codes into the major categories, identified major uncertainties of benefit and harms, as well as contributing factors leading to these benefits and harms.

Study 2: Suggestions and actions

While discussing results from the analysis of possible benefits and drawbacks of GenAI, the team decided to expand the number of articles and to prompt the LLM to extract sections that mention suggestions or actions to mitigate the risks of GenAI. This effort led to a database with n=665 articles, covering the period of October 2022 to early February 2024. All four media outlets are represented in the dataset.

In line with the previous study, initial tests were conducted using different models. Given continued advancements in free/open-sourced LLMs, we experimented with additional models that were recently published and/or updated. In study 2, three models returned promising results in terms of number of meaningful extractions, two of which were those that also performed best in the previous study. Outputs were screened by one researcher, and results for the two best preforming models were closely examined by two researchers. Confirming the decision made in the previous study, both agreed that the variation of the *Neural Chat* model again performed best in terms of quantity and quality of responses.

A combination of inductive and deductive thematic analysis was conducted on the extracted data. Once again utilizing the *CodeIt* platform, the lead author coded responses on action steps for a random subset of articles. Following from a discussion of the codebook created during this step, two authors already familiar with the data from the first study conducted a deductive thematic analysis of results from all n=665 articles on action steps. The coding process was iterative, with both coders going through new responses from the LLM as they became available.

Findings

Our analysis identified how public discourse on GenAI is socially constructing our perceptions of benefits, consequences, drivers, and needed actions. We present these findings in what follows. Specifically, we focus here on the benefits and drawbacks, and the suggestions made in the media about the best course forward in terms of a policy response. To illustrate each main theme, we provide verbatim quotes from media articles returned by the best performing model.

Study 1: The Benefits and Drawbacks of GenAI

Our analysis identified an array of uncertainties surrounding the implications of GenAI, some of which (unsurprisingly) dovetail with the noted benefits and concerns detailed in the academic literature. Indeed, the news media has reported on how GenAI may rely on bias and can provide misinformation, a concern also flagged by different academics. However, beyond the concerns about misinformation and bias, our research of the media conveys three major tensions around the impacts of GenAI on (a) human work at organizations, (b) human life outside of work, including wider human society into the future.

Impact on human work at organizations

Indeed, the potential for GenAI to impact human work is a prime theme of the media coverage of the technology. This coverage focuses on the anticipated productivity gains with GenAI for individuals, organizations, and industries. The driver behind these anticipated economic gains is GenAI's ability to offer many different services, where it could provide gains for both high-skilled workers and those with less specialized skills alike, through aiding learning or supporting translation, among many other applications.

However, an apparent wider focus is on the benefits it could bring to the wider economy, through aggregate economic growth. At the same time, some coverage points to the idea that this productivity could be overestimated, leading to a type of 'GenAI bubble' (similar to what was seen with the Internet Bubble decades ago). The extent—or presence—of this 'bubble' is debated, however. As noted,

And it feels 2010 in social media right now. But it's not just hype. I think we should also be clear about that. I think some of it certainly is hype, but there's also just been an astounding number of breakthroughs in just what's possible to do with AI over the past few years. [NYT4]

In this way, uncertainty reigns regarding whether GenAI will cause massive productivity gains, or if the expectations will fall short.

Not only would business productivity be helped, media coverage points towards the idea that GenAI can also help in the realm of creativity, such as in the arts or other creative jobs and industries [HW4]. On the other hand, media reports also relayed concerns whether GenAI would reduce creativity, such as through contributing to similar outputs that are 'boring' or not unique. [HW5]. At the core, being boring or not unique would seem to be the antithesis of creativity. Therefore, whether GenAI would help or hinder creativity in work is uncertain.

While media coverage notes that GenAI could create new jobs [HW6], as, for example, risks associated with GenAI likely will require human oversight. Despite this, media relayed fears of widespread job loss and job insecurity. Such fears are not unfounded, where, for example GenAI could cause the automation of many currently paid tasks, suggesting that GenAI use can lead to significantly higher rates of unemployment [HW7]. This lack of coherence in the media also reflects the contested social construction of the uncertain impact of GenAI.

Impact on human life outside organizations

The data revealed concerns around how this technology would be used, and whether it would be used in a prosocial way or not. In media accounts, there is widespread concern as to whether this technology would be used for nefarious ends, thereby causing harm and eroding trust. Specifically, GenAI can produce disinformation. For example, media reports note concerns around 'deepfakes'. These incidences could have repercussions, where GenAI could provide "inaccurate and dangerous statements, generating disinformation, degrading critical thinking, eroding the factual foundation of modern society" [NYT1], especially when considering its use in the educational environment. When used, this could harm individuals but also increase risks to, for example, politics [HL1], where such faked images could result in misinformation and undermine trust in people:

You're talking about violence, you're talking about stealing of elections, you're talking about fraud—[this has] real-world consequences for individuals, for societies and for democracies. [Hany Farid cited in WP2]

Such concerns are also intertwined with concerns around biases in GenAI. The opportunities for misuse take on a wider, and more longer-term concerns, up to and including the downfall of humanity:

Influential AI leaders […] have warned that AI poses a risk on par with pandemics or nuclear weapons to human societies. Many prominent AI researchers and businesspeople say the tech is advancing so quickly that it could soon outstrip human intelligence and begin making its own decisions. [WP3]

Such accounts paint a picture of a potential dystopian future where the AI escapes from the realm of human control, causing harm, while contributing to climate change due to its heavy energy consumption. On the other hand, others caution against such rhetoric, while at the same time noting that the future is yet uncertain [HL2]. Importantly, at the other side of the spectrum, other accounts point to a future where GenAI helps us to elevate humanity by providing transformative breakthroughs [HL3]. In this way, whether society will be overall helped or harmed, and whether GenAI will be our salvation or destruction is contested in the media. The contrasting media accounts show how humans negotiate the social construction of the expected impact on human life.

Driving factors contributing to uncertainty

While the impacts of GenAI are being debated in the media, the analysis also points to the underlying drivers of why these uncertainties exist. These driving factors are threefold. First, this powerful breakthrough technology can be employed in a variety of ways while providing humanlike accessible and personalized interactions at low cost or free-of-charge [UN1]. Second, the broader questions around how the technology will develop in the future is another factor driving uncertainty:

[…] anything touching elected officials or the political process could become a new battleground for speech. They also mention that politicians might influence the development of large language models and ban certain subjects like critical race theory from being taught. [NYT5]

This prospect, and the use and interaction occur amidst the backdrop of widespread concerns around how both training data and data-in-use were and are handled [UN2]. For example, some training data has been criticized for containing illegal material:

Critics argue that AIs do not transform but exploit the entirety of the databases they mine. They claim that the firms behind machine learning abuse fair use to "free-ride" on the work of individuals. And they contend that this threatens the livelihoods of the creators, as well as society at large, if the AI promotes mass surveillance and the spread of misinformation. [ECON1]

This surveillance may be occurring on all of society, but also for individuals in their private and professional lives and what will occur if their data is shared unwittingly or used in nefarious ways.

Study 2: Towards Mitigating GenAI Risks

Given the tensions and uncertainties just described, and the unfortunate example of social media as a technology context with significant ramifications when there is no proactive response, we turn in Study 2 to the possible ways to develop a policy response to the drawbacks associated with GenAI. Three main thrusts of suggestions that emerge from the analysis of the media's coverage of GenAI, corresponding to the stakeholders involved. In short, actions are expected by (1) the technology firms who develop and run GenAI, (2) public sector actors (i.e., government), and (3) users of GenAI, whether individuals or organizations. We describe each of these in turn and provide examples from the media.

Not surprisingly, the technology firms who have developed GenAI tools are a key focus of expected mitigation efforts regarding the technology's anticipated negative impacts. Suggested actions focus on different stages, specifically the initial development stage and, subsequently, during use of their technology.

Focusing on the development stage, there are calls for strong training and testing for safety in use *before* release [T1, see also WP4], including the use of experienced engineers to judge and validate the GenAI results [FT7]. Within this is the suggestion that datasets be evaluated for safety, which includes avoiding illegal and harmful information being used during training, as well as identifying when inaccurate information is treated identically to accurate information:

requiring those rolling out AI systems to first subject them to independent safety audits and later conduct post-release impact assessments; prohibiting using the technology in a way that "intentionally deprives" or "defrauds" an individual of their right to vote; creating a "duty of care" requiring those crafting AI systems to take "reasonable measures to prevent and/or mitigate harms". [WP5]

This 'stress-testing' before release is thought to improve the user's overall experience, including self-image impacts, as well as physical safety, including when GenAI assists in product development.

Suggested actions during the development stage also focused on recommendations on how to make the GenAI safer when being used. These "guardrails" are focused on companies providing careful fine-tuning of their technologies, such that they have precise purposes that do not foster unanticipated or nefarious application. Further, the GenAI companies are encouraged to invest in continuous training of the GenAI with up-to-date and legally usable data [T2], although what data would be considering legally usable remains contested. More broadly, respecting the rights of legal owners of training data has been called for in the media.

Other suggestions focused on providing customers with clear guidance on the use of GenAI and offering disclaimers. Such actions would focus on disclosure not only of GenAI being used in an interactive way, such as in the case of chatbots, but also disclosure of when content has GenAI output in it.

While these measures are all anticipated to be within the control of the technology firms themselves, they often require that the companies take actions that may not be typical and thus have been suggested in the same context as government regulations. While companies often have codes of ethics which may guide them to avoid unnecessary consequences of their products [FT12], the specific level of action required may call for regulatory enforcement of such ethics such as in specifying that individuals/users should own their name, image, and likeness [FT7]. That major GenAI technology firms have suggested that a joint "Constitution" of values and principles be created to keep chatbots from generating toxic content is an interesting hint that these firms do want rules to abide by [FT13].

While cooperation is suggested, a concern raised about shared industry-level standards is that they may effectively reward the largest, wealthiest firms who have the

resources to resolve and implement those standards, and the result may be an industry that is 'safe' but in the hands of a concentrated set of wealthy elites [FT18]. The latter is a concern associated with a recent White House executive order on AI safety that seeks appropriate business models and useful metrics to avoid harm:

[…] using the power of the new White House executive order around AI safety to start figuring out more about the business model, standardised metrics to gauge both progress and harm, and confronting monopoly power and risk in AI. [FT18]

Media coverage also notes that the risk of concentration must be weighed against the risks that even the industry wishes to avoid, beyond basic misinformation to possible electoral manipulation, terrorism, and broader economic disruption [ECON6].

Regarding public sector actions, as can be expected, the cooperation between technology companies and governments could be tenuous and subject to changing conditions, requiring attention to other areas of protection such as regulation. Although there has been some focus on the idea that regulation could hold back innovation or even dilute existing rights, the media largely signals a positive acceptance of certain regulatory actions, especially actions aimed at larger GenAI players, with concerns that an uncertain regulatory environment may slow acceptance and use of GenAI.

Such regulations could involve, for example, data privacy laws and intellectual property protection, whether newly developed or by adapting existing laws. A key piece of these calls is to work toward reasonable protection and consent guidelines [P1] and establishing what tech firm accountability entails [P2]. More generally, a prevalent area of focus surrounds the suggestions to limit GenAI use in certain applications and especially to avoid high-risk contexts, such as using synthetic personas in endorsements or applying GenAI in the healthcare sector:

[…] This includes the AI Act which has been agreed upon but still needs ratification by member states. The AI Act has a two-tier approach for AI models, imposing legal requirements on transparency for general-purpose AI models like OpenAI's and tougher requirements for those in sensitive sectors like healthcare. [FT4]

On the other hand, media has also called upon government to create policies to foster more equitable outcomes from use of the technology. This includes laws that require technology companies to identify and mitigate risks [P4]. At the same time, governments are

called up on to anticipate the impact of this technology. For example, there are calls to limit the replacement of humans by GenAI and provide paid leave for workers to be able to develop new skills, as well as calls for a 'displacement tax' when workers are automated 'out' of their jobs [P5]. Similarly, there are calls for financial incentives to technology firms to build their tools to be complementary to human workers instead of substitutes for them [P6].

Regulatory calls also have reflected broader system considerations. For example, the United States has announced export restrictions related to sending advanced computing chips to China [P7]. The rationale is, in part, competition-based, as has been seen in articles that focus on specific country efforts around GenAI. However, these calls also point to the problems of transparency, as well as illegal or nefarious uses of the technology, as fundamental problems which cannot be left to political motivations. Some point to the need to ban free/open-source AI models outright as their training and free access may make them easier to abuse by 'bad actors' [P8] or at the very least to punish nefarious users.

Collectively, these suggestions from the news media for how governments should react, and even collaborate on collective standards, are presented as signs of how large the consequences associated with GenAI are expected to be. However, lacking a sound basis for legislative action, there is little expectation of the government keeping up with the rapid change of the technology, so governments must engage now:

Governments worldwide have called for robust legislation to police this fast-developing technology, with the EU's AI Act expected to be finalised by early next year. The UK meanwhile is hosting the first global summit on AI safety next week, with political leaders and leading tech executives invited to discuss co-operation on issues such as national security. [FT17]

As the third component of how GenAI is changing our economic and social landscape, users of the technology play a role in shaping its future. Users consist of both individuals, who use GenAI for enjoyment, curiosity, learning or other individual reasons, and companies, whose 'client' status with technology firms means they are both recipients of the benefits and harms of GenAI, as well as potential distributors of the same as they apply it to their workforce, operations, and customers.

From a policymaking standpoint, the role of the individual user of GenAI is decidedly framed in the media as mostly an unwitting victim of the power of the technology, with frequent undertones related to 'buyer beware,' although there are contexts in which the

media's coverage also assigns some responsibility to individuals. Generally, for private citizens, that responsibility is relatively light and essentially suggests continued learning to distinguish between how GenAI can aid certain tasks while not being relevant to others (e.g., piloting a plane) [FT23]. In contrast, a sub-theme of the media coverage harkens back to the impacts of social media on children and assigns parents the responsibility to determine whether their children should be permitted to use GenAI:

A concentration on the relationship between parents, or programmers, and their children could be welcome, too. What is it to bring up an AI well? What sort of upbringing should be forbidden? To what extent should the creators of AIs be held responsible for the harms done by their creation? [ECON7]

This is framed, interestingly, in part, as *not* the responsibility of the technology companies themselves.

Where the role of individuals is more proactively a part of the policymaking discourse is when it comes to professionals, such as lawyers and healthcare providers. This focus is on developing new professional skills, such as having to learn to validate evidence to avoid deep fakes [U1]. Publishers, likewise, are expected to work harder to determine how to protect their content against plagiarism [U2]. Individual app developers who use free/open-source LLMs as a basis for their creations are expected to consider where their data is stored, thus guarding it against privacy attacks [U3]. In this way, the focus is on how individuals can monitor the use of GenAI, as well as its output, while ensuring human supervision.

Underlying each of these, of course, is the expectation that a system of rights and judicial processes can support how individuals operate to protect themselves and their work, where the role of individuals in policymaking will not be subverted by powerful interests that shape much of the rest of the market for GenAI. The media, while addressing these individual responsibilities, has not lost sight of that larger context.

In contrast to these expectations of the individual user, the companies who have contracted with the GenAI technology firms to develop or adapt the technology for their own use are seen in a different light than either the tech firms or regular individuals. Generally speaking, they are framed as 'takers,' not 'designers'– in that they are applying yet not creating GenAI—and thus less responsible for the problems inherent to GenAI. Instead, they are assigned responsibility for protecting their employees and their customers, and to have a

discerning approach to how they allow the technology to transform their companies and markets.

For example, business leaders are expected to develop within-organization guardrails against the anticipated challenges inherent to the technology.

Business leaders must figure out how to take advantage of the technologies today, while preparing workers for the disruption that the tools present over the medium term. They must guard against the mistakes and biases A.I. often perpetuates and be thoughtful about what it means for employees. […] It's then about making sure we can re-skill the work force quickly enough and A.I.-enable them quickly enough to meet the obvious demand that's going to come on the back of it. [NYT10]

This preparation of their workers is expected to happen in real time, without delay, and perhaps may involve strong internal controls on which employees may use GenAI for which tasks [U4]. Some have already indicated their intentions: PwC is retraining 65,000 workers to use GenAI [U5], and colleges have begun to prepare their students for careers that will require GenAI-related skills [U6]. Banks like JPMorgan have banned ChatGPT from its computer systems while it awaits the work of hundreds of data scientists to test how using GenAI could impact sensitive data [U7]. In other cases, firms have redefined their goals to avoid potentially serious harm. Some focus on a narrow set of training data in order to avoid copyright battles [U8].

In sum, as can be seen from these three main areas—technology firm actions, public sector actions, and user actions—of how the news media envisions a policy response to GenAI, there is a wide range of potential actions, some requiring more collaboration and agreement than others. As GenAI is evolving in real time, the contexts and issues will continue to emerge and likely build on these policy ideas as well as generate new ones. For now, we consider what they mean as a baseline approach to a meaningful response.

Discussion

This study focused on media articles on the topic of GenAI, and this revealed a myriad of contested spaces around the implications of GenAI, including impact on human work and on human life, both in the short- and long-term. Two key driving factors contributing to this uncertainty are (1) that the GenAI can produce misleading and biased information, its training data, and its unpredictable development path, and (2) the technology is easily employed in a

variety of ways, with an appealing humanlike interaction. Our data also pointed to three key potential avenues for mitigating the risks associated with GenAI: a set of clear expectations established for technology firms, the use of new and adapted regulatory approaches to control the sphere in which GenAI can be used, and awareness and careful consideration by users, both individual and client-oriented, to protect themselves and others. In our effort to identify how a policy response to emerging GenAI is socially constructed, and therefore reflective of the priorities and concerns that may lead most fruitfully to effective policy interventions, we found considerable uncertainty with an array of varying suggestions on the way forward.

It is here that our social constructivism lens is important. Over time, the varying opinions, including by and through the media, will yield the social construction of how GenAI is viewed and approached. Our data have shown the on-going debate between technology firms, regulatory institutions, and other stakeholders for the public opinion on GenAI. Existing social constructs around other technologies, such as AI (not generative) and social media, will likely influence the social construction related to GenAI. Interestingly, with social media, much of the literature has said little about government oversight of social media platforms apart from noting the lack of such oversight. Some authors have prioritized industry self-regulation (Haynes and Robinson, 2016; Minow and Minow, 2023) as more likely to be productive against the ills of social media. Seminal work in marketing has also argued for the need for self-regulation. For example, when it comes to issues such as data privacy and security, it is important that industry groups be active in self-regulation (Milne, 2000).

However, in late 2023, a former Facebook engineer, Arturo Bejar, testified before the United States Senate about the limitations of self-regulation, reflecting on not only the lack of will within social media companies to change their practices, but also to a need for regulation to create new tools and measures to hold social media companies accountable for their impacts, particularly for young teens (Bejar, 2023). US Senators Richard Blumenthal and Marsha Blackburn authored the “Kids Online Safety Act of 2022” (KOSA) with this goal in mind, essentially suggesting that the US government create new defaults on how social media companies operate. In their proposed legislation, mental health of teenagers is the focus (Blumenthal and Blackburn, 2022), and, if enacted, the law would include new data requirements, enhanced tools for protecting children, annual risk assessments and

independent research on company data. On January 9, 2024, Meta, the parent company of Facebook, announced new features in Facebook and Instagram that aim to increase teen safety (Duffy, 2024).

Indeed, the risks of waiting for self-regulation are too high when the issues at hand are as consequential as whether productivity will be helped or harmed and in which industries, and what the use of GenAI will mean for the working life of employees and their wellbeing. Further, whether GenAI can be used to support creativity, or whether it will squelch human creativity, is still being debated. How individuals will engage with GenAI for personal tasks and whether they can rely on the technology for meaningful, unbiased output remains contested. These are just some of the uncertainty-related tensions uncovered in our data. Policymakers must seek to decrease this uncertainty if they are to effect policies that can bolster the potential strengths of GenAI while seeking to mitigate the drawbacks.

In light of the discussion around social media—and reflecting on our findings in this study—it becomes clear that key stakeholders, including technology companies, public actors, and corporate and individual users, need to work together to not only (1) proactively reduce the impact of the most likely implications (namely job changes and loss), but also to (2) uncover the wider implications of GenAI, which can, in turn, help us identify other frequently experienced implications. Our social constructivism theoretical lens posits that understanding, significance, and meaning are developed in coordination with other human beings. It is therefore essential that the many stakeholders do in fact work together to attach the right significance and meaning to GenAI. Social beings should interact with each other in productive ways to construct the soundest understanding and policies, lest GenAI drive the process. Humans should not passively allow the technology to shape the reality, as was too often the case with social media.

Similarly, when we focus on uncovering the wider implications of GenAI, there is a need to reduce widespread uncertainties and impacts. Based on this challenge, we recommend that policymakers push for the creators and users of GenAI to embrace a broad ethos of transparency. If radical transparency could be achieved, it would include opening for review the data used to train LLMs, the processes used by tech firms to generate those LLMs, as well as the outcomes, whether good or bad, from their use. Given the proprietary nature of the programming used by tech firms, it seems unlikely that, in the absence of suitably strong

regulation, radical transparency could become a reality. Alternatively, systemic transparency could focus on fully elaborating the cultural, economic, and regulatory foundations that lead to the data that train LLMs, such that biases and poor information are unearthed, as well as a comprehensive understanding of how the outputs of GenAI pervade all aspects of life, whether at work or not. In this light, the nature of how a new technology adjusts norms and behaviors could be revealed for the benefit of policymakers at all levels.

Our findings point towards factors driving the uncertainty, including bias, misinformation, and data management issues. By understanding the implications of this through supporting systematic transparency, we can help to uncover whether the training we suggest be offered is sufficient for users to be able to identify bias and misinformation, or whether something else needs to be done. However, the uncertainties around the technology developments, including whether the bias and misinformation remain (which is likely), and the wider implications regarding (training) data use—including as cases work through various legal systems—require that policymakers constantly reassess as the technology develops. To avoid the situation that occurred with the advent and adoption of social media, all stakeholders need to urgently call for and act towards ensuring that policies are crafted as quickly as possible.

Limitations and Future Research

This research focused on articles from four significant media outlets covering the topic of GenAI. Doing a similar analysis on recent academic journal articles, pre-print articles, and conference proceedings could provide different insights on the topic, particularly if that research reflects the continued evolution of the GenAI technology. Further, while much of the coverage in our media outlets does include interviews from relevant experts, and we were interested in exploring media coverage given its influence on policymakers and wider public discourse, future research that accounts for other data sets, such as interviews with key GenAI actors or surveys of GenAI users, could be quite informative.

This data set was limited to articles published October 2022 onwards, which was appropriate given the timeline of the advancement of GenAI in the public realm but nonetheless has its limitations. Future research could investigate earlier media coverage, as GenAI did exist prior to 2022 even if not in a largely publicly accessible manner. Further, as the

articles were in English and from an American and British perspective, future research can look into comparing media coverage between regions and countries and also include multiple languages. While, arguably, the media is "in essence a contested space in which the most powerful groups can establish the dominance of specific messages" (Harper and Philo, 2013, p.333), it also behooves researchers to include diverse media sources. Adding media that may be focused in specific economic, social, or creative sectors, for example, may yield further insight into the social construction of GenAI's value.

Further, we used free/open-source large language models to help analyze the data, and such LLMs are subject to the quality of the data they were trained on, the prompts used, and the available computational power of consumer-grade hardware. We sought to mitigate these limitations in several ways. First, by setting the LLM's 'temperature' to zero, meaning they were not to interpret what they found in each chunk. Second, by adding human oversight at every step of the process, such as when interpreting the quantity and quality of text extractions resulting from different LLMs and prompt variations. Finally, by not using GenAI tools to code text extractions, and instead to rely on manual coding by two coders. As data protections and transparency improve over time, researchers may consider more refined LLMs or otherwise avoid their usage. We found their power in exploring a large quantity of written material to be an important benefit in this research.

Additionally, more research in marketing needs to be undertaken to explore what barriers are preventing or hindering policymakers in their goals to craft guidelines and policies around GenAI. Such research could also focus on the barriers that impacted the (lack of) policies in marketing related to social media, potentially with instructive implications for GenAI. Finally, while the media provides information to policymakers, policymakers themselves provide information to the media, which can also shape public opinion (Happer and Philo, 2013). Future research can take a marketing lens to uncover this dynamic and the role it has in the development not only in GenAI policy, but also the adoption and use of marketing activities.

Conclusion

The advent of GenAI is both exciting and concerning, with great uncertainties around the overall implications of GenAI and what is the best road forward. These uncertainties are driven by the nature of the technology itself, but also the way in which the technology has

and will be developed and used. As we look to the future, it becomes imperative that we try to unpack these elements. Through systematic transparency, we can have more hope of steering humanity towards a more positive, and less dystopian, future.

References

Adiguzel, Tufan, Mehmet Haldun Kaya, and Fatih Kürşat Cansu (2023), "Revolutionizing Education with AI: Exploring the Transformative Potential of ChatGPT," *Contemporary Educational Technology*, 15(3), ep429.

Akter, Shahriar, Grace McCarthy, Shahriar Sajib, Katina Michael, Yogesh K. Dwivedi, John D'Ambra, K.N. Shen (2021), "Algorithmic Bias in Data-driven Innovation in the Age of AI," *International Journal of Information Management*, 60, 102387.

Anderson, Nathaniel W., Neal Halfon, Daniel Eisenberg, Anna J. Markowitz, Kristin Anderson Moore and Fredrick J. Zimmerman (2023), "Mixed Signals in Child and Adolescent Mental Health and Well-Being Indicators in the United States: A Call for Improvements to Population Health Monitoring," *The Milbank Quarterly*, 101(2), 259-286.

Ashley, Christy, and Hillary A. Leonard (2009), "Betrayed by the Buzz? Covert Content and Consumer–brand Relationships," *Journal of Public Policy & Marketing*, 28(2), 212-220.

Andrews, J. Craig, Scot Burton, Gregory T. Gundlach, Ronald Paul Hill, Jeremy Kees, Richard G. Netemeyer and Kristen L. Walker (2022), "What Exactly is Marketing and Public Policy? Insights for JPPM Researchers," *Journal of Public Policy & Marketing*, 41(1), 10-33.

Banker, Sachin, and Salil Khetani. (2019), "Algorithm Overdependence: How the Use of Algorithmic Recommendation Systems Can Increase Risks to Consumer Well-Being," *Journal of Public Policy & Marketing*, 38(4), 500-515. https://doi.org/10.1177/0743915619858057

Bejar, Arturo (2023) "Written Testimony of Arturo Bejar before the Subcommittee on Privacy, Technology, and the Law," *United States Senate*, November 7, 2023, retrieved from https://www.judiciary.senate.gov/committee-activity/hearings/social-media-and-the-teen-mental-health-crisis

Blumenthal, Senator Richard (D-CT) and Senator Marsha Blackburn (R-TN) (2022), "The Kids Online Safety Act of 2022," *United States Senate*, retrieved from https://www.blumenthal.senate.gov/imo/media/doc/kids_online_safety_act_-_one_pager.pdf

Braghieri, Luca, Ro'ee Levy, and Alexey Makarin (2022), "Social Media and Mental Health," *American Economic Review*, 112(11): 3660–3693.

Brand, James, Ayelet Israeli, and Donal Ngwe (2023), "Working Paper: Using GPT for Market Research," Available at SSRN 4395751.

Braun, V., & Clarke, V. (2006), "Using Thematic Analysis in Psychology," *Qualitative Research in Psychology*, 3(2), 77–101. https://doi.org/10.1191/1478088706qp063oa

Briley, Donnel A., L. J. Shrum, and Robert S. Wyer Jr (2013), "Factors Affecting Judgments of Prevalence and Representation: Implications for Public Policy and Marketing," *Journal of Public Policy & Marketing,* 32(1): 112-118.

Brough, Aaron R., and Kelly D. Martin (2021), "Consumer Privacy During (and After) the COVID-19 Pandemic," *Journal of Public Policy & Marketing*, 40(1), 108-110. https://doi.org/10.1177/0743915620929999

Chaudhuri, Ranjan, Zahid Hussain, and Sheshadri Chatterjee (2022), "Social Media Usage and Its Impact on Users' Mental Health: A Longitudinal Study and Inputs to Policymakers," *International Journal of Law and Management*, 64(5), 441-465.

Chui, Michael, Roger Roberts, Eric Hazan, Alex Singla, Kate Smaje, Alex Sukharevsky, and Rodney Zemmel (2023), "The Economic Potential of Generative AI," McKinsey and Company, https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/the-economic-potential-of-generative-ai-the-next-productivity-frontier

Davenport, Thomas, Abhijit Guha, Dhruv Grewal and Timna Bressgott (2020), "How Artificial Intelligence Will Change the Future of Marketing," *Journal of the Academy of Marketing Science*, 48, 24-42.

De Bruyn, Arnaud, Vijay Viswanathan, Yean Shan Beh, Jürgen Kai-Uwe Brock, and Florian Von Wangenheim (2020), "Artificial Intelligence and Marketing: Pitfalls and Opportunities," *Journal of Interactive Marketing,* 51(1): 91-105.

De Cremer, David, and Garry Kasparov (2021), "AI Should Augment Human Intelligence, Not Replace It," *Harvard Business Review*, 18, 1.

De Cremer, David, and Devesh Narayanan (2023), "On Educating Ethics in the AI Era: Why Business Schools Need to Move Beyond Digital Upskilling, Towards Ethical Upskilling," *AI and Ethics*, 1-5.

De Paoli, S. (2023), "Performing an Inductive Thematic Analysis of Semi-Structured Interviews with a Large Language Model: An Exploration and Provocation on the Limits of the Approach," *Social Science Computer Review*. Advance online publication. https://doi.org/10.1177/08944393231220483.

Diaz Ruiz, Carlos, and Tomas Nilsson (2023), "Disinformation and Echo Chambers: How Disinformation Circulates on Social Media through Identity-driven Controversies," *Journal of Public Policy & Marketing*, 42(1), 18-35.

Duffy, Clare (2024), "Meta Adds New Teen Safety Features Following Renewed Criticism," *CNN Business*, January 9, retrieved from https://www.cnn.com/2024/01/09/tech/meta-new-teen-safety-features/index.html.

Dwivedi, Yogesh K., Nir Kshetri, Laurie Hughes, Emma Louise Slade, Anand Jeyaraj, Arpan Kumar Kar, Abdullah M. Baabdullah, Alex Koohang, Vishnupriya Raghavan, Manju Ahuja, Hanaa Albanna, Mousa Ahmad Albashrawi, Adil S. Al-Busaidi, Janarthanan Balakrishnan, Yves Barlette, Sriparna Basu, Indranil Bose, Laurence Brooks, Dimitrios Buhalis, Lemuria Carter…Ryan Wright (2023), "So What if ChatGPT Wrote It? Multidisciplinary Perspectives on Opportunities, Challenges and Implications of Generative Conversational AI for Research, Practice and Policy," *International Journal of Information Management*, 71, 102642.

EU (European Union) (2023, December 19), EU AI Act: First Regulation on Artificial Intelligence. Retrieved from: https://www.europarl.europa.eu/news/en/headlines/society/20230601STO93804/eu-ai-act-first-regulation-on-artificial-intelligence

EU (European Union) (2023b, December 9), Artificial Intelligence Act: Deal on Comprehensive Rules for Trustworthy AI. Retrieved from: https://www.europarl.europa.eu/news/en/press-room/20231206IPR15699/artificial-intelligence-act-deal-on-comprehensive-rules-for-trustworthy-ai

Gezinski, Lindsay B., and Kwynn M. Gonzalez-Pons (2022), "Sex Trafficking and Technology: A Systematic Review of Recruitment and Exploitation," *Journal of Human Trafficking,* 1-15.

Glader, Paul (February 1, 2017), "10 Journalism Brands Where You Find Real Facts Rather Than Alternative Facts," *Forbes*. Accessed online on January 11, 2024.

https://www.forbes.com/sites/berlinschoolofcreativeleadership/2017/02/01/10-journalism-brands-where-you-will-find-real-facts-rather-than-alternative-facts/?sh=78591747e9b5.

Foxman, Ellen R., and Paula Kilcoyne (1993), "Information Technology, Marketing Practice, and Consumer Privacy: Ethical Issues," *Journal of Public Policy & Marketing*, 12(1), 106-119.

Gamson, William A., and Andre Modigliani (1989), "Media Discourse and Public Opinion on Nuclear Power: A Constructionist Approach," *American Journal of Sociology*, 95(1): 1-37.

Gao, Catherine A., Frederick M. Howard, Nikolay S. Markov, Emma C. Dyer, Siddhi Ramesh, Yuan Luo and Alexander T. Pearson (2023), "Comparing Scientific Abstracts Generated by ChatGPT to Real Abstracts with Detectors and Blinded Human Reviewers," *NPJ Digital Medicine*, 6(1), 75.

Grace, Katja, Harlan Stewart, Julia Fabienne Sandkühler, Stephen Thomas, Ben Weinstein-Raun and Jan Brauner (2024), "Thousands of AI Authors on the Future of AI," arXiv preprint arXiv:2401.02843.

Graham, Sarah, Andre Mason, Benjamin Riordan, Taylor Winter, and Damian Scarf (2021), "Taking a Break from Social Media Improves Wellbeing Through Sleep Quality," *Cyberpsychology, Behavior, and Social Networking*, 24(6), 421-425.

Guha, Abhijit, Dhruv Grewal, Praveen K. Kopalle, Michael Haenlein, Matthew J. Schneider, Hyunseok Jung, Rida Moustafa, Dinesh R. Hegde, and Gary Hawkins (2021), "How Artificial Intelligence Will Affect the Future of Retailing," *Journal of Retailing*, 97(1), 28–41.

Happer, Catherine, and Greg Philo (2013), "The Role of the Media in the Construction of Public Belief and Social Change," *Journal of Social and Political Psychology*, 1(1), 321-336.

Haynes, David, David Bawden, and Lyn Robinson (2016), "A Regulatory Model for Personal Data on Social Networking Services in the UK," *International Journal of Information Management*, 36, 872–882.

Hill, Ronald Paul and Kanwalroop Kathy Dhanda (2004), "Globalization and Technological Achievement: Implications For Macromarketing and the Digital Divide," *Journal of Macromarketing, 24*(2), 147-155.

Hoffman, Donna L., C. Page Moreau, Stefan Stremersch, and Michel Wedel (2022), "The Rise of New Technologies in Marketing: A Framework and Outlook," *Journal of Marketing*, 86 (1), 1-6.

Huang, Ming-Hui, and Roland T. Rust (2021), "A Strategic Framework for Artificial Intelligence in Marketing," *Journal of the Academy of Marketing Science*, 49: 30-50.

IBM (2023), "What are AI Hallucinations?," https://www.ibm.com/topics/ai-hallucinations

Karlen, Janice M. (2014), "Privacy: Expectations and Employment," *Business Management Dynamics*, 3(10), 28-36.

Krippendorff, Klaus (2005), "The Social Construction of Public Opinion." In: Edith Wienand, Joachim Westerbarkey, and Armin Scholl (Eds.), *Kommunikation über Kommunikation: Theorien, Methoden und Praxis—Festschrift für Klaus Merten*. Wiesbaden: VS Verlag für Sozialwissenschaften, 129-149.

Kshetri, Nir, Yogesh K. Dwivedi, Thomas H. Davenport, Niki Panteli (2023), "Generative Artificial Intelligence in Marketing: Applications, Opportunities, Challenges, and Research Agenda," *International Journal of Information Management*, 102716.

Lambert, Jeffrey, George Barnstable, Eleanor Minter, Jemima Cooper, and Desmond McEwan (2022), "Taking a One-Week Break from Social Media Improves Well-Being, Depression, and Anxiety: A Randomized Controlled Trial," *Cyberpsychology, Behavior, and Social Networking*, 24(5), 1-7.

Li, Peiyao, Noah Castelo, Zsolt Katona, and Miklos Sarvary (2023), "Working Paper: Language Models for Automated Market Research: A New Way to Generate Perceptual Maps," Available at SSRN 4241291.

Liu-Thompkins, Yuping, Shintaro Okazaki, and Hairong Li (2022), "Artificial Empathy in Marketing Interactions: Bridging the Human-AI Gap in Affective and Social Customer Experience," *Journal of the Academy of Marketing Science*, 50(6), 1198-1218.

Lim, Weng Marc, Asanka Gunasekara, Jessica Leigh Pallant, Jason Ian Pallant and Ekaterina Pechenkina (2023), "Generative AI and the Future of Education: Ragnarök or Reformation? A Paradoxical Perspective from Management Educators," *The International Journal of Management Education*, 21(2), 100790.

Maboloc, Christopher Ryan (2023), "ChatGPT: The Need for an Ethical Framework to Regulate its Use in Education," *Journal of Public Health*, https://doi.org/10.1093/pubmed/fdad125

Maitland, Nadine, and Jenice Lynch (2020), "Social Media, Ethics, and the Privacy Paradox," *Journal of Internet Law*, March, 3-14.

Martin, Kelly D., Abhishek Borah, and Robert W. Palmatier (2017), "Data Privacy: Effects on Customer and Firm Performance," *Journal of Marketing*, 81(1), 36-58.

Mello, Jeffrey A. (2012), "Social Media, Employee Privacy and Concerted Activity: Brave New World or Big Brother?" *Labor Law Journal*, 63(3), 165-173.

Milne, George R. (2000), "Privacy and Ethical Issues in Database/Interactive Marketing and Public Policy: A Research Framework and Overview of the Special Issue," *Journal of Public Policy & Marketing*, 19(1), 1-6.

Minow, Newton, and Martha Minow (2023), "Social Media Companies Should Pursue Serious Self-Supervision — Soon: Response to Professors Douek and Kadri," *Harvard Law Review Forum*, 136: 428-442.

Noy, Shakked, and Whitney Zhang (2023), "Working Paper: Experimental Evidence on the Productivity Effects of Generative Artificial Intelligence," Available at SSRN 4375283.

O'Brien, Oonagh, Alexander Sumich, Thom Baguley, and Daria J. Kussb (2023), "A Partial Correlation Network Indicates Links between Wellbeing, Loneliness, FOMO and Problematic Internet Use in University Students," *Behaviour & Information Technology*, 42(16), 2717–2734.

O'Guinn, Thomas C. and L.J. Shrum (1997), "The Role of Television in the Construction of Consumer Reality," *Journal of Consumer Research*, 23 (March), 278-9.

Pechenkina, Katya (2023), "Artificial Intelligence for Good? Challenges and Possibilities of AI in Higher Education from a Data Justice Perspective," in L. Czerniewicz, & C. Cronin (Eds.), *Higher Education for Good: Teaching and Learning Futures* (#HE4Good). Cambridge, UK: Open Book Publishers.

Plangger, Kirk, Dhruv Grewal, Ko de Ruyter, and Catherine Tucker (2022), "The Future of Digital Technologies in Marketing: A Conceptual Framework and an Overview," *Journal of the Academy of Marketing Science*, 50(6), 1125-1134.

Rosenthal, Samantha R., and Abigail P. Tobin (2023), "Self-esteem Only Goes So Far: The Moderating Effect of Social Media Screen Time on Self-esteem and Depressive Symptoms," *Behaviour & Information Technology*, 42(15), 2688-2695.

Satariano, Adam, Cade Metz, and Tripp Mickle (2024, March 1), Elon Musk Sues OpenAI and Sam Altman for Violating the Company's Principles. *The New York Times*, Retrieved from: https://www.nytimes.com/2024/03/01/technology/elon-musk-openai-sam-altman-lawsuit.html

Stewart, David W., and Qin Zhao (2000), "Internet Marketing, Business Models, and Public Policy," *Journal of Public Policy & Marketing*, 19(2), 287-296.

Sundvik, Linda M.S. and Sarah K. Davis (2023), "Social Media Stress and Mental Health: A Brief Report on the Protective Role of Emotional Intelligence," *Current Psychology*, 42:18714–18719.

Vlačić, Božidar, Leonardo Corbo, Susana Costa e Silva, and Marina Dabić (2021), "The Evolving Role of Artificial Intelligence in Marketing: A Review and Research Agenda," Journal of Business Research, 128: 187-203.

A Multilevel Analysis of the Reverse Logistics Marketing System Using the Provisioning Systems Approach

Anne B. Zehoul

Marcus Wilcox Hemais

Introduction

In 2022, 93% of the total waste generated in Brazil was collected, but 40% of this volume was improperly disposed of in approximately 2,600 open dumps and controlled landfills, posing severe environmental and social risks. Beyond pollution of water, soil, fauna, and flora, the exposure to this waste can impact the health of populations living within a 60 km radius of these dumps (Abrema 2022). That same year, the federal government, through National Decree 11,043/2022, instituted Planares – the National Solid Waste Plan, which outlines strategies and targets for waste management in the country up to 2040. Among its goals, Planares aims to increase recyclable material recovery rates from 2.2% in 2020 to 20% by 2040.

Solid waste management in Brazil is a complex socio-environmental issue, impacting public health and environmental sustainability. The macromarketing discipline provides theoretical principles that significantly contribute to addressing complex contemporary problems. These include a systemic perspective on marketing phenomena, encompassing social and economic aspects beyond the consumer-firm dyad, and a vision of marketing as a discipline concerned with its societal impacts rather than purely managerial, instrumental knowledge production (Benton 2021; DeQuero-Navarro, Stanton and Klein 2021).

Recently, the provisioning systems approach has emerged as a more appropriate lens to analyze complex issues such as climate disasters, rising inequalities, environmental degradation, and excessive consumption. This approach recognizes that the growing complexity of contemporary crises requires solutions beyond marketing systems, integrating other forms of social arrangements and exchanges (Fanning, O'Neill and Büchs 2020; Layton and Domegan 2021; Layton, Domegan and Duffy 2022; Shapiro 2024). Fanning et al. (2020) define provisioning systems as "a set of interrelated elements that work together to transform resources to satisfy a forecasted human need."

This study aims to better understand the reverse logistics marketing system through a multilevel analysis using the provisioning systems approach. By examining specific elements

of the analyzed context, the study reveals complexities not yet addressed in the literature, enriching the understanding of how provisioning systems operate. The research employed an integrated multiple case study approach, incorporating interviews with experts in waste management, reverse logistics and marketing and sustainability executives from four major companies in different industrial sectors in Brazil.

Theoretical Framework

The marketing system, a core concept in macromarketing (Layton 2007), posits that economic exchanges in any market occur within a multilevel context influenced by political, economic, and social factors, which, in turn, shape norms, institutions, and behaviors. Layton and Domegan (2021) expand on this idea, asserting that economic systems are integrated into complex social networks, which are provisioning systems. This holistic perspective is crucial to understanding not only consumption dynamics but also the contexts in which they occur.

The provisioning systems approach situates marketing systems within a broader perspective, where various systems interconnect to meet the needs and desires of a community (Fanning, O'Neill and Büchs 2020; Fine, Bayliss and Robertson 2018; Layton and Domegan 2021). This approach emphasizes the development of "sustainable societal provisioning systems" that balance social justice and sustainability (Shapiro 2024).

Layton and Domegan (2021) propose that provisioning systems dynamically combine four distinct arrangements: prescriptive systems (top-down, hierarchical), marketing systems (innovative and diverse), collaborative exchange systems (e.g., community gardens), and informal exchange systems (e.g., street markets). Effective management of tensions between government-driven prescriptive power and the bottom-up organization of society determines the sustainability of these systems and their adaptive capacity.

Methodology

This study conducted an integrated multiple case study, involving interviews with executives from four distinct sectors and experts in waste management and reverse logistics, as detailed in table 1. Interview data were triangulated with secondary data, and the analysis followed Bardin's (2011) classical content analysis approach, supported by Atlas.ti 24 software.

Table 1 – Interviewees Profile

Experts	**Position/Qualification**
	Lawyer - regulatory and governance specialist
	Urban planning and climate adaptation expert
	Circular economy transition consultant
	Recycling start up – customer relationship manager
Corporate Interviewees	**Company Sector**
	Food and Beverage
	Industry Equipments
	Software and industry equipments
	Personal Care

Source: the Authors

Study Context: Recycling and Reverse Logistics of Packaging - The National Solid Waste Policy.

Waste management in Brazil is regulated by the National Solid Waste Policy (NSWP). Two aspects related to waste regulation in Brazil present significant challenges for implementing reverse logistics processes. The first is the principle of shared responsibility, which requires all stakeholders—government (at municipal, state, and federal levels), industries, importers, distributors, retailers, and consumers—to work collaboratively and jointly. The second aspect concerns the participation of waste pickers. According to data from the National Movement of Recyclable Material Collectors, approximately 800,000 waste pickers are active in Brazil. Under the PNRS, they must be integrated into reverse logistics programs (Brasil 2010; ReciclaSampa 2022).

Sectoral agreements, initiated by the federal government through public consultations, are the primary instruments used to implement reverse logistics programs. Environmental regulation in Brazil has shown a tendency to shift from a “command-and-control” approach to voluntary agreements. Generally, sectoral agreements are negotiated between the public sector and industry associations representing the private sector, setting

goals and general conditions for implementing the provisions established by law (Polzer, Pisani and Persson 2016).

Results and Discussion

Through an individual analysis of the roles of each actor in the reverse logistics marketing system, three primary challenges of this system were identified:

The Reverse Logistics Marketing System Relies Heavily on the Role of Companies.

The industry bears the responsibility of meeting recycling targets, which are coupled with obligations to include waste pickers in the system, promote education and awareness campaigns, and purchase recycled materials. The primary challenge lies with domestic industries, which, according to interviewed experts, lack the capacity to bear the costs of reverse logistics due to the economic infeasibility of recycling many materials.

Consumers: The Least Connected Actor in the System.

Consumers, integrated into the reverse logistics system under the principle of shared responsibility, form a diverse group regarding their awareness and knowledge of proper disposal practices. However, they appear to be the least connected actors in this system due to the absence of a consistent, ongoing program aimed at their engagement.

The government seeks to indirectly reach consumers through agreements established with industries in sectoral decrees. However, one of the criticisms of the negotiation process for the sectoral packaging agreement was the exclusion of civil society representatives (Pereira and Ribeiro 2021). Industries, in turn, focus their efforts on operating the reverse logistics system, often coordinating through industry associations to provide financial and structural support for waste picker cooperatives and other initiatives, such as establishing Voluntary Delivery Points (PEVs). Consequently, the relationship between industries and consumers is largely indirect and impersonal, with industry associations and coalitions frequently leading the implementation of consumer communication and awareness plans.

Complex Governance.

The reverse logistics system is large and complex, encompassing actors ranging from autonomous waste pickers to major corporations and various levels of government. This system often faces interference from different stakeholders with conflicting interests. While the federal government establishes the obligations and commitments outlined in the PNRS, municipalities are responsible for managing solid waste. As a result, the operationalization of

reverse logistics, led by companies, depends on numerous partnerships and collaborations with municipalities and cooperatives in these localities.

In addition to the multiplicity of entities, there is significant variation in resources and infrastructure among them, further complicating the coordination and oversight of the system. This shared-responsibility framework, coupled with governance challenges, can create a vicious cycle. Insufficient selective collection infrastructure discourages both consumers from proper disposal and companies from investing in awareness campaigns. The limited volume of collected waste, combined with the low value of recyclable materials, hinders the development of the recycling industry and waste pickers. Consequently, the price of recycled materials remains uncompetitive, discouraging companies from reducing their reliance on the country's abundant virgin raw materials. Without a prospect for system improvement, the industry resorts to political pressure to maintain the status quo.

Final Considerations

This study situates the reverse logistics marketing system within the context of a provisioning system, demonstrating its interactions with other subsystems and revealing a unique configuration shaped by specific factors such as sectoral agreements and the significant role of waste pickers. Despite achieving short-term success in social inclusion for waste pickers, medium- to long-term challenges remain. With limited access to information and infrastructure, consumers make consumption and post-consumption decisions without fully understanding their consequences, hindering broader discussions on values beyond self-interest.

Theoretical Contributions

The conclusions of this study deepen the connection between the concepts of marketing systems and provisioning systems by analyzing how interactions between provisioning subsystems impact the reverse logistics marketing system. This analysis situates the system within a macro context, illustrating how the state, companies, consumers, and cooperatives collaborate to achieve social, economic, and environmental objectives. By examining specific contextual elements, this study uncovers complexities not yet addressed in the literature, enriching the understanding of how provisioning systems function.

This case study demonstrates how sectoral agreements act as a potential solution for preventing conflicts between prescriptive, marketing, collaborative exchange, and informal exchange subsystems, corroborating Layton et al.'s (2022) argument on the necessity of creating cooperative instruments among diverse groups within a provisioning system.

Moreover, the study highlights governance complexities not previously explored in the literature, revealing both positive and negative aspects of provisioning systems governance. On the one hand, sectoral agreements have a positive impact on the recycling industry by facilitating the implementation of reverse logistics for packaging. On the other hand, the political influence of industry associations in setting recycling targets may inhibit the medium- and long-term development of reverse logistics. These findings align with Layton et al.'s (2021) argument on the importance of effective governance for the evolution and adaptability of provisioning systems.

To our knowledge, this study is the first to demonstrate the dynamics of a provisioning system that includes an informal exchange subsystem, specifically highlighting the challenges of integrating autonomous waste pickers into the reverse logistics marketing system. This advances the understanding presented in existing literature (Layton and Domegan 2021; Renton, Hooper and Renton 2024; Williams *et al.* 2024).

Consistent with Renton et al. (2024), the analyzed prescriptive system also highlights the dual role of the state as both provider of infrastructure and regulator of the NSWP. The division of responsibilities between the federal government—oversight of the solid waste plan—and municipalities—provision of waste collection and disposal infrastructure (e.g., landfills)—reveals a governance structure that deviates from the traditional top-down, hierarchical, and bureaucratic descriptions provided by Layton et al. (2021). Instead, the communication and information flows necessary to integrate these roles resemble bottom-up, collaborative, and trust-based exchange systems.

Practical Contributions

The study offers two practical suggestions for improving the reverse logistics marketing system, focusing on enhancing delivery mechanisms and communication flows with consumers:

1. *Prioritize Waste Management in National Sustainability Agendas:* Waste management must become a priority in Brazil's sustainability agenda, which currently

emphasizes forest preservation while urban waste management receives limited visibility in global forums. This shift would enable the allocation of resources from international climate funds to finance structural actions, such as establishing recycling facilities, formalizing waste picker labor, constructing landfills, and coordinating consumer awareness campaigns with private sector efforts.

2. *Develop a Collaborative Model:* Creating a collaborative model where multiple companies form "hubs" (e.g., recycled inputs from one company used as raw materials by another) would facilitate the implementation of more efficient reverse logistics systems. These hubs would integrate businesses under the principle of circularity, including shared marketing strategies. The smaller scale of these projects would make economic and quality-of-life benefits more measurable, aiding in the attraction of additional investments and resulting in a more balanced marketing system, where costs and benefits are equitably distributed among public authorities, private enterprises, and consumers.

References

Abrema (2022), *Panorama dos resíduos sólidos no Brasil*. [S.l.: s.n.].

Bardin, L. (2011), *Análise de conteúdo*. São Paulo: Edições 70.

Benton, R. (2021), "Our obsolete marketing mentality: George Fisk, meet Karl Polanyi," *Journal of Macromarketing*, 41(1), 88–103.

Brasil (2010), *Lei nº 12.305, de 02 de agosto de 2010: Institui a Política Nacional de Resíduos Sólidos*. Brasília, DF. Retrieved from https://www.planalto.gov.br/ccivil_03/_ato2007-2010/2010/lei/l12305.htm#:~:text=L12305andtext=LEI

Dequero-Navarro, B., Stanton, J., and Klein, T. A. (2021), "A panoramic review of the macromarketing literature," *Journal of Macromarketing*, 41(1), 48–64. https://doi.org/10.1177/0276146720949636

Fanning, A. L., O'Neill, D. W., and Büchs, M. (2020), "Provisioning systems for a good life within planetary boundaries," *Global Environmental Change*, 64(August), 102135. https://doi.org/10.1016/j.gloenvcha.2020.102135

Fine, B., Bayliss, K., and Robertson, M. (2018), "The systems of provision approach to understanding consumption," in O. Kravets et al., eds., *The SAGE Handbook of Consumer Culture*, 27–42. London: SAGE Publications Ltd.

Layton, R. (2007), "Marketing systems – A core macromarketing concept," *Journal of Macromarketing*, 27(3), 227–242.

Layton, R. A., and Domegan, C. (2021), "The next normal for marketing — The dynamics of a pandemic, provisioning systems, and the changing patterns of daily life," *Australasian Marketing Journal*, 29(1), 4–14. https://doi.org/10.1177/1839334921998514

Layton, R., Domegan, C., and Duffy, S. M. (2022), "Getting things right; diagnose and design in the evolution of community provisioning systems," *Journal of Macromarketing*. https://doi.org/10.1177/02761467221109136

Polzer, V., Pisani, M. A. J., and Persson, K. M. (2016), "The importance of extended producer responsibility and the National Policy of Solid Waste in Brazil," *International Journal of Environment and Waste Management*, 18(2), 101–119.

ReciclaSampa (2022), "Cerca de 800 mil pessoas vivem da reciclagem no Brasil." [S.l.]. Retrieved January 31 2024, from https://www.reciclasampa.com.br/artigo/cerca-de-800-mil-pessoas-vivem-da-reciclagem-no-brasil

Renton, M., Hooper, V., and Renton, A. (2024), "Extending Layton's marketing systems for future transformation – Deepening connections between marketing and provisioning systems: A case-based approach," *Journal of Macromarketing*.

Shapiro, S. J. (2024), "Towards a sharper 'golden anniversary' focus for macromarketing?" *Journal of Macromarketing*. https://doi.org/10.1177/02761467241229637

Williams, J., et al. (2024), "Layton's marketing systems at the intersection of provisioning systems: Examining failure," *Journal of Macromarketing*. https://doi.org/10.1177/02761467231222537

A Sociocultural Praxis Framework for Transforming Marketing Education

Chahna Gonsalves

Lucy-Gill Simmen

Teresa Pereira Heath

Sarah Montano

Nicki Newman

Laura Chamberlain

The evolving landscape of marketing, shaped by environmental crises, technological advancements, and societal shifts, necessitates a fundamental rethinking of marketing education. Traditional models that prioritize corporate profit and managerial efficiency are inadequate for preparing students to address the complex ethical and societal dimensions of modern marketing (Burton 2001, Hackley 2009). This paper introduces an integrative pedagogical framework that combines Freirean praxis with Vygotsky's sociocultural theory to rectify these shortcomings. The framework aims to develop marketing professionals who are critically aware, ethically responsible, and equipped to tackle pressing issues such as sustainability, inequality, and digital transformation (Heath, Moufahim et al. 2023).

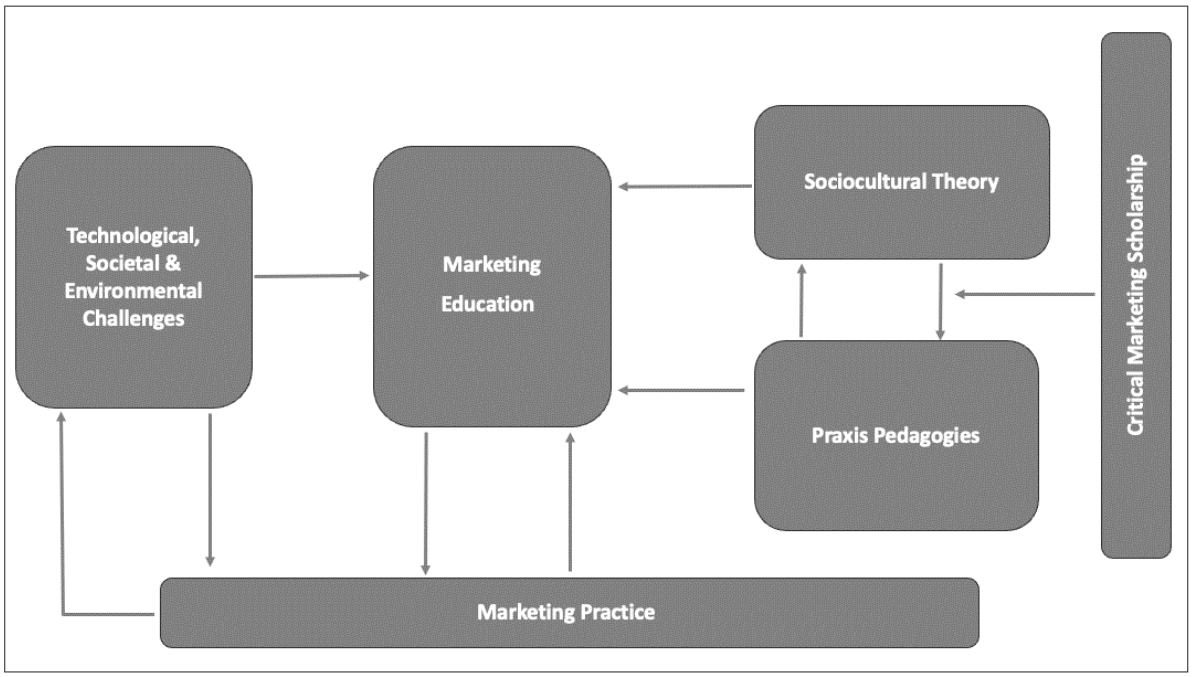


Figure 1. A transformative pedagogic framework for marketing education.

At the heart of this transformative approach is Freire's concept of praxis, which emphasizes the reciprocal relationship between reflection and action directed towards social

change (Freire 1970). Praxis provides a foundation for developing critical consciousness among students, enabling them to question the ethical and societal implications of marketing practices rather than passively absorb managerialist perspectives (Giroux 2020). Freire's critique of the traditional "banking" model of education, where students are treated as passive recipients of knowledge, is particularly relevant to marketing education, which often marginalizes broader societal and environmental concerns in favour of maximizing corporate profitability (Tadajewski 2016, Chandy, Johar et al. 2021).

However, while Freirean praxis foregrounds critical engagement and ethical reflection, it is Vygotsky's sociocultural theory that provides the pedagogical tools necessary to ground this critical reflection within specific cultural, social, and historical contexts. Vygotsky and Cole (1978) argues that learning is not an isolated cognitive process but is deeply influenced by social interactions and cultural tools. In the context of marketing education, this theory underscores the importance of situating learning within the socio-historical conditions that shape both marketing practices and consumer behaviour (John-Steiner and Mahn 1996). By incorporating Vygotsky's concept of the zone of proximal development (ZPD), educators can scaffold students' learning experiences, guiding them from surface-level knowledge acquisition to deeper critical engagement with real-world marketing challenges (Van Der Stuyf 2002).

This integrated praxis-sociocultural framework fosters an educational environment in which students critically reflect on the broader implications of marketing strategies and develop the capacity to enact socially responsible and ethically informed marketing practices. In doing so, students are better equipped to address complex global challenges such as environmental sustainability, social justice, and technological disruption. For instance, the framework encourages students to analyse the ethical dimensions of greenwashing, the societal impact of targeted advertising, and the exclusion of marginalized communities from mainstream marketing efforts (Chatzidakis, Maclaran et al. 2021, Heath and Tynan 2023) approach empowers students to not only master technical marketing skills but also to deploy them in ways that prioritize social equity and environmental sustainability (Jamil, Humphries-Kil et al. 2024).

The inclusion of Vygotsky's sociocultural theory within this framework further emphasizes the need for cultural competence and inclusivity in marketing education.

Marketing strategies are not universally applicable but are shaped by local socio-cultural contexts and global power dynamics (Singh, Sahadev et al. 2020). By fostering a learning environment that encourages students to engage with cultural diversity, educators can cultivate a more nuanced understanding of how marketing practices vary across different societal contexts, and how these practices must be adapted to align with ethical and socially responsible goals (Heath, Moufahim et al. 2023). This approach not only prepares students for the challenges of a globalized marketplace but also instils a deeper awareness of marketing's role in perpetuating or challenging societal inequalities (Wertsch 1995).

In addressing contemporary challenges, the praxis-sociocultural model proves particularly well-suited to the ethical and technological dilemmas facing modern marketers. As artificial intelligence (AI), big data, and digital marketing continue to reshape the industry, students must acquire not only technical proficiency in these tools but also the critical thinking skills to assess their broader societal and ethical impacts (Ferrell and Ferrell 2020). Embedding these technological considerations within the praxis-sociocultural framework enables students to develop a balanced approach, one that combines technological fluency with ethical reasoning, ensuring that they are prepared to navigate the complexities of a rapidly evolving digital economy (Rust and Huang 2021).

Similarly, the global sustainability crisis demands that future marketers adopt practices that go beyond mere profitability to include environmental stewardship and social responsibility (UNESCO 2023). The praxis-sociocultural framework offers a robust method for integrating sustainability into marketing education by encouraging students to critically engage with real-world sustainability challenges through role-playing, ethical debates, and experiential learning projects (Walker, Dyck et al. 2019, Heath and Tynan 2023). This prepares students to develop innovative, responsible marketing strategies that not only meet corporate objectives but also contribute positively to society and the environment.

However, implementing this transformative framework poses several challenges. One significant obstacle is the need for educators to reassess their teaching practices. Marketing educators may need to unlearn entrenched assumptions about education's purpose, shifting from a knowledge transmission model to one that prioritizes critical engagement and social responsibility (Freire 1970, Biggs 2014). This transformation also requires rethinking traditional assessment methods, which often prioritize technical skills over critical reflection

and ethical reasoning (Paul and Elder 2007). A more holistic evaluation approach is necessary—one that measures students' abilities to critically assess the ethical dimensions of marketing and apply this knowledge responsibly.

Moreover, creating a genuinely collaborative learning environment, where students and educators engage in dialogue as co-creators of knowledge, may be difficult to achieve within the hierarchical structures of higher education (Bourdieu and Passeron 1990). Institutional support is essential for facilitating this pedagogical shift, and educators will require professional development to effectively integrate praxis and sociocultural methods into their teaching (Giroux 2011). Despite these challenges, the proposed framework offers a clear and actionable path for transforming marketing education, equipping students to meet the ethical, technological, and environmental challenges of the 21st century. By fostering a critical, socially responsible approach to marketing, this framework ensures that future marketers will be prepared not only to succeed in their careers but also to contribute meaningfully to a more equitable and sustainable world.

References

Biggs, John (2014) "Constructive Alignment in University Teaching." HERDSA Review of Higher Education 1, 5-22.

Bourdieu, Pierre and Jean-Claude Passeron (1990). Reproduction in Education, Society and Culture. Thousand Oaks, California, Sage.

Burton, Dawn (2001). "Critical Marketing Theory: The Blueprint?" European Journal of Marketing 35(5/6): 722-743.

Chandy, Rajesh K, Gita V Johar, Christine Moorman and John H Roberts (2021). "Better Marketing for a Better World." 85(3): 1-9.

Chatzidakis, Andreas, Pauline Maclaran and Rohit Varman (2021). "The Regeneration of Consumer Movement Solidarity." Journal of Consumer Research 48(2): 289-308.

Ferrell, Oc and Linda Ferrell (2020). "Technology Challenges and Opportunities Facing Marketing Education." Marketing Education Review 30(1): 3-14.

Freire, Paulo (1970). Pedagogy of the Oppressed. Toward a Sociology of Education. London, UK, Routledge**:** 374-386.

Giroux, Henry A (2011). On Critical Pedagogy. London, Bloomsbury.

Giroux, Henry A (2020). "Thinking Dangerously: The Role of Higher Education in Authoritarian Times." Chowanna(54 (1)): 1-12.

Hackley, Chris (2009). Marketing: A Critical Introduction. London, Sage.

Heath, Teresa, Mona Moufahim and Lisa O'malley (2023). "Critical and Creative Marketing Pedagogies: Confronting Rhetoric, Addressing Inequality, Inspiring Change." 39(1-2): 1-7.

Heath, Teresa and Caroline Tynan (2023). ""We Want Your Soul": Re-Imagining Marketing Education through the Arts." European Journal of Marketing.

Jamil, Nazarina, Maria Humphries-Kil and Kahurangi Dey (2024). "Infusing Courageous Love for Universal Dignity and Environmental Response-Ability through Management Education and Learning: Inspired by Freire's Dream." Management Learning 55(1): 41-62.

John-Steiner, Vera and Holbrook Mahn (1996). "Sociocultural Approaches to Learning and Development: A Vygotskian Framework." Educational psychologist 31(3-4): 191-206.

Paul, Richard and Linda Elder (2007). "Critical Thinking: The Art of Socratic Questioning." Journal of developmental education 31(1): 36.

Rust, Roland T and Ming-Hui Huang (2021). The Feeling Economy: How Artificial Intelligence Is Creating the Era of Empathy. Cham, Switzerland, Palgrave Macmillan.

Singh, Pallavi, Sunil Sahadev, Caroline J Oates and Panayiota Alevizou (2020). "Pro-Environmental Behavior in Families: A Reverse Socialization Perspective." Journal of Business Research 115: 110-121.

Tadajewski, Mark (2016). "Critical Marketing Studies and Critical Marketing Education: Key Ideas, Concepts and Materials." RIMAR-Revista Interdisciplinar de Marketing 6(2).

Unesco. (2023). "Education for Sustainable Development." Retrieved 3 October 2023, from https://en.unesco.org/gap/priority-action-areas.

Van Der Stuyf, Rachel R (2002). "Scaffolding as a Teaching Strategy." Adolescent learning and development 52(3): 5-18.

Vygotsky, Lev Semenovich and Michael Cole (1978). Mind in Society: Development of Higher Psychological Processes, Harvard university press.

Walker, Kent, Bruno Dyck, Zhou Zhang and Frederick Starke (2019). "The Use of Praxis in the Classroom to Facilitate Student Transformation." Journal of Business Ethics 157: 199-216.

Wertsch, Jv (1995). Sociocultural Studies of Mind. Cambridge, Cambridge University Press.

A Visual Analysis of 1900-1936 Japanese Beer Posters – A Window Into The Intersection of Art, Tradition, Culture And Commerce in Contested Consumerist Pre-WW II Japan

Hieu P. Nguyen

Today, beer is an integral part of the Japanese culinary art and culture but it was not introduced to Japan until the late 19th century with the arrival of brewing techniques from Europe during the Meiji era (1868-1912) as Japan underwent rapid industrialization, modernization, and Westernization after three centuries of closure. In order to introduce and establish beer as a staple beverage, breweries used posters, many of which featured *bijinga* ("pictures of beautiful women"). These posters serve not only as advertisements but also as valuable unique and captivating cultural artifacts with rich artistic expressions that document the rapid cultural and societal shifts in the Japanese society in their respective eras. Examining these vintage posters provides deep insights into not only the evolution of beer advertising in Japan but also broader changes in the Japanese society, as well as beer's influence on Japan's visual identity.

To appeal to the Japanese elite who associated beer with sophistication and modernity, the earliest posters drew inspirations mainly from the prevailing European art movements - Art Nouveau and Art Deco - featuring intricate illustrations, bold typography and vibrant color schemes. Later, the artistic range of posters was broadened to include traditional Japanese woodblock prints (*ukyio-e*), creating a fusion of *Nihonga* (Japanese-style painting) and *Yoga* (Western-style painting), embodying a bridge of traditional and contemporary art forms. This combination of traditional Japanese aesthetics with Western art genres and design elements creates a unique visual language of vintage beer posters. The early 20th century was a transformative period in Japan's history, marked by the Taisho (1912-1926) and Showa (1926-1989) eras. At the turn of this century, the transition from imported to domestic beer production, notably by brands like Kirin, Asahi and Sapporo, marked a turning point in Japanese beer advertising with posters increasingly incorporating more traditional Japanese motifs and quintessential elements of the Japanese culture and visual iconography such as the kimono, cherry blossom, traditional architecture, and especially *bijinga* (beautiful women), depicted as both consumers and symbols of elegance and modernity. Offering a window into the changing attitudes toward alcohol and consumption of the Japanese society at the time, beer posters depict scenes of conviviality, camaraderie, relaxation, and

celebration, emphasizing the social aspects of beer consumption. Against this background, the beautiful Japanese woman embodied not only the physical beauty of her peers but also the cultural ideals of beauty, grace, sophistication and refinement, traditional and symbolic cultural elements that resonate deeply with the Japanese audience. The striking attention to details and exquisite craftmanship and skills by the poster artists greatly enhanced the aesthetics of the posters, making them stand out and helping brands create and strengthen their identities and appeals.

More importantly, the use of beautiful Japanese women in beer posters not only taps into consumers' desire for and appreciation of beauty and elegance, but represents changing societal values and norms as the country underwent rapid modernization, industrialization, and militarization between 1900 and 1936, leading up to its involvement in World War II. While some *bijinga* posters featured Japanese women in traditional kimono, others portrayed them in Western clothes and bob cuts, looking confident and active, happily embracing new opportunities in education and employment. These flappers embodied the spirits of youth, independence, and rebellion, reflecting the changing roles and ambitions of Japanese women.

Vintage Japanese posters transcend their role as advertisements to become cultural and artistic artifacts, documenting the transition of Japan from isolation to globalization. To this day, Japanese beer brands still produce posters using elements like typography, color schemes and imagery heavily inspired by vintage posters to create a sense of nostalgia and connect with consumer segments that appreciate history, tradition and authenticity, nurturing a sense of emotional attachment to and association with the brands and breweries, as well as evoking a sense of cultural identity.

Data for this research come from museum collections that are accessible to the public in Japan as well as printed copies published by Japanese publishers. The visual semiotics analysis of the posters follows procedures proposed by the "image reading" framework by Kress and van Leeuwen (2006) and implemented in research examining Vietnamese wartime propaganda posters and post-war reconstruction visual art (Nguyen 2023, 2025). Using this framework, posters will be analyzed with close attention to 1/ their technological modality (how they were made, circulated and displayed, what were the visual effects); 2/ compositional modality (the genre and composition of the posters, the viewing angle offered by the poster artists, and the accompanying slogans); and 3/ social modality (the visual

meanings of posters as interpreted by the viewing public in the social and historical contexts in which posters were produced).

Over the 2023 winter break, the author travelled to Japan to collect data by visiting beer museums as well as bookstores. Additionally, the author also visited *izakayas* (small Japanese bars that serve inexpensive drinks and dishes) where prints of vintage beer posters are still displayed. The author had meetings with the curators of a 2011 poster exhibition at the Print Museum in Tokyo and learned about the history of poster making and the significance of posters in the Japanese commercial world pre-World War II. These meetings yielded valuable insights that are not found in the English-language literature on posters. Additionally, Japanese-language poster books that feature vintage Japanese posters of various product categories, including beer, were acquired during this trip. About 60 Japanese vintage beer posters have been screened as the potential visual data source for this study due to their visual richness and representations. This project is expected to be completed by the end of 2025.

References

Kress, Gunther and Theo van Leeuwen (2006), *Reading Images: The Grammar of Visual Design*. New York, NY: Routledge.

Nguyen, Hieu P. (2025), "Conflict Recovery in Socialist Utopia – A Critical Analysis of Vietnam's Post-war Reconstruction Policies Through A Visual Interpretation of 1976-1986 Propaganda Posters," *Journal of Public Policy & Marketing, 44(1),* 160-178.

Nguyen, Hieu P. (2023), "Mobilizing a Nation: Persuasive Appeals in Vietnamese War Posters," *Journal of Macromarketing*, *43(2)*, 129-153.

Addressing poverty in Brazil through socially responsible marketing: a research agenda proposal

Guilherme Torres

Ana Carolina Vitor

Ramon Silva Leite

Abstract

Marketing has been discussed as an instrument for social change, especially in the field of macromarketing, which addresses issues such as poverty and equity. In Brazil, with 220 million inhabitants and high levels of poverty and social inequality, Socially Responsible Marketing (SRM) emerges as an alternative to mitigate these issues by aligning marketing practices with social expectations. This study investigates the extent to which SRM has been employed to address poverty in Brazil, by critically analyzing existing approaches, prevailing trends, and conceptual gaps in the literature.". The research revealed that while despite its prominence in international scholarship, SRM remains underexplored in the Brazilian context, warranting further theoretical and empirical investigation. The analysis indicated the potential of SRM to play a strategic role in shaping public policies and private initiatives aimed at combating poverty. Finally, a research agenda is proposed to explore the potential of SRM in addressing social issues, particularly poverty, considering its characteristics and challenges in the Brazilian context. The four categories identified in the research agenda provide direction for future investigations and practical applications. By considering international experiences and adapting successful models to the Brazilian context, SRM can contribute to more effective and sustainable solutions. Thus, this study aims to stimulate new academic and practical debates on SRM in Brazil, encouraging its adoption as a tool for social transformation.

Keywords: Socially Responsible Marketing (SRM); Social Marketing; Brazil; Poverty.

1 introduction

The role of marketing in society has been debated for decades, particularly since the emergence of "macromarketing," which views marketing as a vehicle for social change, including topics such as poverty, social development, and equity (Shapiro 2012). In this context, Socially Responsible Marketing (SRM) emerges as a strategic approach to integrating marketing practices with social objectives, focusing on reducing inequalities and promoting sustainable development.

In 2021, Laczniak and Shultz introduced an article on the concept of Socially Responsible Marketing, explaining its components and suggesting that marketing professionals use this definition to evaluate marketing practices (Laczniak and Shultz 2021). This publication was considered a milestone in defining the SRM concept by the editor of the Journal of Macromarketing. Advancing the SRM concept, Nill (2022) explores how hypothetical imperatives, which align ethical actions with profits, predominate in companies, while categorical imperatives, which advocate non-negotiable ethical commitments, are rare, resulting in corporate pragmatism that often sacrifices social responsibility in favor of competitiveness. Socially responsible marketing should go beyond profit generation and include initiatives that respect and strengthen existing economic practices within vulnerable communities. Rather than viewing informality as a problem, it can be seen as an opportunity to develop market strategies that enhance economic and social resilience, improving the working and living conditions of these populations (Tucker & Anantharaman, 2020).

The definition of Socially Responsible Marketing is considered "macro" because society's expectations regarding marketing can be better understood from a systemic perspective rather than being deduced from a micro-level analysis of individual companies focused primarily on financial goals and only secondarily on social impacts (Laczniak and Shultz 2021). The macro layer adds concerns about the social objectives of marketing.

The topic of Socially Responsible Marketing is particularly relevant in a country with Brazil's social characteristics. In 2024, Brazil hosted the 19th G20 Summit. During its presidency, the country promoted the creation of the Global Alliance Against Hunger and Poverty, aiming to eradicate world hunger by 2030, reinforcing the urgency of public policies to combat social inequality. Additionally, topics such as climate change, social inequality, and reforms in international organizations were discussed.

Nill (2022) also highlighted that Brazilian consumers are increasingly inclined to support companies that adopt ethical and sustainable practices, suggesting that by adopting Socially Responsible Marketing practices, companies can not only contribute to society but furthermore meet the growing demand for social responsibility from consumers. This perspective has been particularly relevant in countries with high levels of social inequality, such as Brazil, which has a population of 220 million, with approximately one-third living below the poverty line (IBGE 2023).

Although the concept of Socially Responsible Marketing (SRM) has been widely discussed in various parts of the world, most of the literature focuses on cases from countries other than Brazil and addresses issues such as environmental sustainability (Dietrich et al. 2022; Gregson et al. 2001), public health (Pattanayak et al. 2009; Schembri, 2019), or government intervention (Chance and Deshpande 2009; Cheung and McColl-Kennedy, 2019). There is a noticeable gap in the literature regarding how SRM strategies can be applied to address poverty and extreme inequality—particularly in emerging economies like Brazil. This gap suggests the need for deeper investigations into how SRM can serve as a tool for social transformation in contexts marked by severe socioeconomic disparities. In response to this gap, this study advances a research agenda delineating critical challenges at the intersection of poverty, inequality, and socially responsible marketing.

The objective is to advance the discussion on the potential of Socially Responsible Marketing as a tool to mitigate poverty and reduce social inequalities in countries with high levels of socioeconomic disparity, such as Brazil, identifying effective strategies and practices to promote positive and sustainable impacts in these contexts.

To support this objective, a bibliometric review was conducted, serving as a foundation for systematically mapping the existing academic production and identifying relevant contributions that inform both theory and practice in this field. This methodological approach ensures a structured and evidence-based foundation for proposing a future research agenda.

Bibliometric review has been widely adopted in various fields of knowledge as a methodology for obtaining indicators that assess scientific production. Its main objective is to examine scientific or technical activity through the quantitative analysis of publications (Chen et al., 2016). This type of research is conducted by analyzing bibliographic databases, indexers, abstracts, directories, journal catalogs, as well as references and citations.

Bibliometric analysis plays a fundamental role in academia, as it allows for the organization of existing knowledge and the identification of gaps or opportunities for new research. To achieve this objective, we conducted an initial search in the Web of Science database using terms related to poverty and socially responsible marketing. This analysis enabled the identification of SRM practices that could be useful for the Brazilian context. Based on this analysis, a research agenda was proposed, consisting of four main categories:

social responsibility, intervention logics, inclusive markets, and regionalization. This agenda also presents questions that may guide future studies.

The article is structured into six sections, beginning with this Introduction. The second section discusses the emergence of Socially Responsible Marketing, the evolution of the concept, and how it is currently being addressed. Next, a concise social and economic overview of Brazil is presented. The fourth section presents the methodology used in this study. The fifth section explores studies on Socially Responsible Marketing in Brazil and its role in combating poverty, thus introducing the suggested literature for further exploration of this theme. Subsequently, a research agenda based on the selected articles and aligned with Brazilian data is presented. Finally, the concluding remarks reflect on the main points discussed throughout the text, the study's limitations, and a final reflection on the topic.

2 A brief social and economic overview of Brazil

Poverty is a significant limitation of market-oriented resources, opportunities, and capabilities (Soundararajan et al. 2024). This definition emphasizes the absence of essential elements that enable effective market participation, highlighting the importance of material resources (housing, potable water, money), access to economic opportunities (social exclusion, lack of rights, limited choices), and the development of skills necessary for economic integration (education, expertise, and experience) (Soundararajan et al. 2024).

According to the Brazilian Institute of Geography and Statistics (IBGE 2023), monetary poverty refers solely to the insufficiency of household income to ensure well-being. IBGE's poverty indicators measure the number of people classified as poor, defined as those living below a specific income threshold, based on per capita household income. The most recent update to the poverty and extreme poverty lines established the values at US$6.85 and US$2.15, respectively (Jolliffe et al. 2022). These two measures are the same ones used by the World Bank for defining and monitoring the Sustainable Development Goals (SDGs) under the 2030 Agenda (UN 2024).

Using these two measures as a parameter, in 2022, Brazil[1] had approximately 12.7 million people living below the extreme poverty line and 67.7 million people below the

[1] Brazil has approximately 220 million inhabitants, based on 2023 data.

poverty line (IBGE 2023). In addition, Black and mixed-race individuals represent the majority of the poor population in Brazil, accounting for 47.6 million people, or approximately 70% of the total poor population. This means that approximately one-third of Brazil's population lives in poverty, with Black Brazilians being disproportionately affected.

Beyond having a large poor population, Brazil also has a high level of income inequality. The IBGE report tracks the evolution of the Brazilian Gini[2] index, which was measured at 0.518 for 2022 (including government transfers). This figure places Brazil among the ten most unequal countries in the world in terms of income distribution (World Bank 2024). Among the 172 countries that updated their Gini index between 2014 and 2024, Brazil ranks seventh among those with the highest levels of inequality. According to Oxfam Brasil, "only six Brazilians hold wealth equivalent to that of the 100 million poorest Brazilians. Furthermore, the richest 5% hold the same share of income as the remaining 95%" (Georges and Maia 2017).

Low social mobility is another important aspect of Brazil's socioeconomic context. According to the World Economic Forum, Brazil ranked 60th in a social mobility index compiled by the organization for 82 countries in 2020 (World Economic Forum 2020). This indicator highlights how difficult it is for the poorest individuals to climb the social ladder in Brazil. One of the measures used in the report estimates how many generations, on average, it would take for a low-income family to reach the median income level of society, assuming all other conditions remain constant. In Denmark, it takes two generations: in France, six; in Brazil and South Africa, it takes nine generations.

According to data from PNAD[3], in 2023, Brazil had 64.1 million people experiencing difficulty accessing food (food insecurity[4]). This accounts for approximately one-third of the

[2] The construction of this indicator is typically based on all available income data for a given population, considering the overall distribution and summarizing it into a single value ranging from 0 to 1. A value of 0 represents a state of perfect equality in income distribution, while a value of 1 indicates perfect inequality, where all the country's income would be concentrated in the hands of a single individual.

[3] Continuous National Household Sample Survey - IBGE (PNAD Contínua)

[4] A situation that ranges from concern and the imminent risk of food restriction to a scenario where there is no food available even for the children in the household.

Brazilian population (IBGE 2024). Of this total, 8.8 million people faced severe food insecurity, a situation in which not only adults but also children suffer from extreme food deprivation, potentially reaching its most acute form—hunger.

To combat poverty and income inequality, the primary tool Brazil has employed is the federal government's social programs. In December 2024, the Bolsa Família program reached 20.8 million families, benefiting approximately 54.4 million people, with a total government investment of R$ 14 billion and an average benefit of R$ 678.36 per family (República 2024).

On the other hand, a recent example of the Brazilian context highlights a concerning trend. A study published in 2024 by the Central Bank of Brazil (BCB) revealed that 5 million individuals from families receiving Bolsa Família benefits—part of a cash transfer program aimed at addressing hunger, poverty, and social inequality—transferred R$ 3 billion to sports betting companies in 2024 (BCB 2024). This case highlights the imperative to assess of cash transfer programs and explore alternative approaches to poverty alleviation.

3 Socially responsible marketing (SRM)

Dietrich and other authors (2022) presented a 50-year literature review on social marketing, based on the premise that social marketing plays a crucial role in addressing major social, environmental, and health issues worldwide. Social marketing provides evidence of its ability to improve people's living standards by co-creating value at all levels of the socioeconomic system (Dietrich et al. 2022).

In this article, the authors presented an evolution of the concept of Social Marketing, divided into four eras. The first era (1969–1989) depicts social marketing as primarily focused on consumer behavior, applying techniques to persuade, sell, and influence. The second era (1990–1999) shifted towards modifying (reducing waste), abandoning (quitting smoking), or maintaining behaviors (donating to charity). The third era (2000–2009) emphasized defining criteria to assess the adequacy of an intervention to the ideal of social marketing, filtering out inadequate interventions before analyzing their effectiveness in behavior change or social impact. The fourth era (2010–2021) introduced a focus on systemic thinking, adopting a broad approach to analyze the entire structure before studying its components and considering possible solutions (Dietrich et al. 2022). According to the authors:

"Social marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviors that benefit individuals and communities in pursuit of a greater social good. Its practice is guided by ethical principles and integrates research, best practices, theory, audience insights, and partnerships to create targeted and competition-sensitive social change programs that are effective, efficient, equitable, and sustainable" (Dietrich et al. 2022).

Kotler and Lee (2009) introduced a social marketing approach focused on poverty alleviation. According to the authors, the primary role of social marketing professionals is to "influence behavior for good." Thus, a social approach to marketing can contribute to reducing social problems, such as poverty. This perspective reinforces the idea that poverty should not be understood as an isolated issue but rather as a network of interconnected disadvantages. As Saatcioglu and Corus (2014) highlight, individuals in vulnerable conditions face challenges across multiple dimensions, including financial hardship, health issues, limited access to essential resources, and social exclusion. These constraints do not operate independently; instead, they overlap and reinforce one another, further increasing the vulnerability of these consumers within the market system (Saatcioglu & Corus, 2014). Thus, the ability of marketing systems to adapt is essential for addressing ever-evolving global challenges (Renton, Hooper & Renton, 2024). Therefore, poverty reduction strategies must be dynamic, taking into account changes in consumer behavior and socioeconomic conditions.

According to Kotler and Lee (2009), social marketing practices can help guide behavior based on different criteria, including: (1) impact (what is the potential impact of the behavior on poverty reduction?), (2) demand (how willing, prepared, and capable is the target audience to adopt this behavior?), (3) supply (to what extent are other programs or organizations already working to influence the target audience to adopt this behavior?), (4) support (what is the level of support for this behavior from key stakeholders, both internal and external?), and (5) organizational alignment (does the organization have the expertise and resources necessary to influence this behavior?).

In another approach, Kotler, Roberto and Leisner (2006) argue that identifying the problem associated with the most affected segment is crucial, and the processes of segmentation, targeting, and positioning are essential tools for understanding the factors that cause certain groups to remain in poverty or escape from it. This highlights the importance of

considering overlapping identity categories (such as socioeconomic status, health conditions, and housing type) in relation to structural and relational dynamics, as stated by Saatcioglu and Corus (2014). According to the authors, it is essential to recognize that "the poor" (1) are a heterogeneous group, (2) require market research to develop effective solutions for poverty alleviation, (3) need support from multiple institutions (government, civil organizations, and businesses), and (4) experience poverty as a cyclical and dynamic phenomenon (Kotler, Roberto and Leisner 2006).

According to Laczniak and Shultz (2021), Socially Responsible Marketing (SRM) is based on an implicit social contract that guides companies to align their policies and actions with social expectations in an ethical and initiative-taking manner. Socially Responsible Marketing (SRM) consists of three fundamental elements. The first is Corporate Citizenship (CC), which refers to the ethical conduct of marketing practices, viewing organizations as "persons" with rights and responsibilities that must act according to ethical standards. The second element is Stakeholder Orientation (SO), a term widely recognized from Freeman's (1984) publication. In the context of SRM, a macro approach to SO is necessary, using this tool not only as a financial instrument to meet customer demands but also as a broader means of understanding the needs of all impacted stakeholders. The third element, Social and Ecological Sustainability (SES), focuses on the environmental and social impacts of marketing, emphasizing that the environment in which marketing operates should not be harmed—and ideally should be improved—by its activities. Table 1 below summarizes the three fundamental elements of Socially Responsible Marketing.

Table 1: The Three Fundamental Elements of Socially Responsible Marketing (SRM)

Element	Definition	Guiding Question
Corporate Citizenship (CC)	Organizations, like individuals, have rights and responsibilities. This includes complying with laws, acting ethically, and contributing positively to the community.	What ethical standards should guide marketing practices?
Stakeholder Orientation (SO)	Stakeholder analysis should go beyond a purely financial perspective focused on customers and business results (micro approach) to	How can businesses balance serving a broad

	encompass a broader macro perspective that considers the needs of all impacted stakeholders.	spectrum of stakeholders?
Social and Ecological Sustainability (SES)	SES concerns the physical impact of marketing on the environment in which businesses operate. Marketing plays a central role in the allocation and distribution of resources to meet customer demands while ensuring sustainability.	How can businesses deliver customer value without harming the environment where marketing activities take place?

Source: Prepared by the authors (2025)

The issue of poverty can be analyzed through any of the three elements of SRM. For example, consider the establishment of a new business selling t-shirts. Where will the raw materials come from? Where will the t-shirts be produced? How will they be delivered to the final customer? What analysis should be conducted to ensure the best social and environmental impact for this business? According to Laczniak and Shultz (2021), Socially Responsible Marketing is a set of practices based on an implicit social contract that requires marketing policies, actions, and outcomes to be guided by an initiative-taking and non-discretionary corporate citizenship, meeting the expectations of society as a whole. SRM acknowledges the need to genuinely consider the claims of stakeholders, particularly consumers and vulnerable groups, while striving for social and environmental sustainability in all its activities (Laczniak and Shultz 2021). Sustainability has become a fundamental component of modern marketing systems. This underscores the importance of integrating sustainable practices into strategies aimed at vulnerable communities (Renton, Hooper & Renton, 2024). Consumers in vulnerable situations face multiple challenges, including limited access to financial resources, social exclusion, and difficulties in formalizing their businesses. In this context, socially responsible marketing can contribute to the development of reparative policies that not only integrate these individuals into the formal market but also recognize their contributions to the urban economy (Tucker & Anantharaman, 2020). Additionally, it incorporates principles of distributive justice, ensuring a fair distribution of benefits and responsibilities among stakeholders, and emphasizes constructive engagement with society to address urgent social demands. This approach moves beyond the traditional focus on profit

and financial returns, prioritizing the social and ethical impact of marketing activities (Laczniak and Shultz 2021).

This publication, which was considered by the editor of the Journal of Macromarketing as a significant milestone in defining the concept of SRM (Laczniak and Shultz 2022), led to a series of comments and critiques aimed at further developing and refining the concept of Socially Responsible Marketing. Ferrell and Ferrell (2022) argue that the concept needs to be expanded thus that it can be used more pragmatically by marketing professionals within organizations. The concept presented by Laczniak and Shultz (2021) is normative and value-based, whereas Ferrell and Ferrell (2022) emphasize the need to make it more empirical and positively descriptive. Santos (2022) highlights that the principle of distributive justice, adopted as an ethical standard for SRM, underscores the importance of ensuring that marketing professionals always consider impoverished populations. He further reinforces that, in addition to environmental sustainability, there must also be a strong focus on social sustainability.

4 Methodology

We chose to use bibliometric review as our methodology because this method focuses on evaluating academic productions within a specific field of study. The term "bibliometrics" was introduced by Pritchard (1969) and refers to the use of techniques to investigate patterns in academic publications, such as citation frequency, co-authorship, and trends in articles, conferences, theses, and other types of documents. Bibliometric analysis, through the study of keywords, enables the identification of patterns and trends in the most relevant topics, highlighting research opportunities and gaps (Chen et al., 2016).

In this context, the search criteria in the Web of Science (WoS) database were carefully established to meet the objectives of this study. Data collection was conducted in January 2025, using a search strategy that included topics covering the title, abstract, author keywords, and Keywords Plus. The selection process for the most relevant articles related to Socially Responsible Marketing, Brazil, and poverty was conducted, initially using the keywords "Socially Responsible Marketing," "Social Marketing," and "Brazil" to identify studies addressing the use of SRM in the Brazilian context. This search returned 130 articles, of which only two of the ten most cited were published in marketing journals: one was another study

by Laczniak and Shultz (2022), and the other was a work by Nairn, Griffin and Wicks (2008). The remaining articles were published in journals from other fields such as health, tourism, and logistics, without a central focus on the application of SRM for poverty mitigation.

Given these limitations, we conducted a second search with a broader scope. In this new search, the keyword "Brazil" was replaced with "Poverty," while keeping the other terms unchanged. The objective was to expand the possibilities of identifying studies that link poverty alleviation initiatives to Socially Responsible Marketing, regardless of the country analyzed. This approach resulted in 232 articles, yielding findings more aligned with the research objectives.

The analysis of the 10 most cited articles from this second search revealed relevant insights into social and economic inequalities, particularly in the fields of health, nutrition, and well-being, with social marketing standing out as a key intervention tool. Many studies utilized theoretical frameworks, such as the Socioecological Model (Gregson et al. 2001; Withall, Jago and Fox 2011), to understand and influence behavior in vulnerable contexts. However, none of the 10 most cited articles were published in marketing journals, as they primarily came from disciplines such as health, medicine, and public policy. Additionally, all of these studies were published before 2014, highlighting the need for more recent and market-oriented research that is applicable to emerging economies.

Regarding this second search, we conducted a screening new process to identify articles published in marketing-focused journals. A total of 26 articles were found, published in journals such as Journal of Macromarketing, Social Marketing Quarterly, European Journal of Marketing, and Journal of Strategic Marketing. This selection yielded more recent studies, with most works published within the last five years.

From this new selection, purely theoretical articles and literature reviews were excluded, prioritizing practical studies that could contribute to a research agenda focused on poverty alleviation.

These articles provided a solid foundation for identifying key themes and practical applications of Socially Responsible Marketing in the context of poverty reduction. By mapping the academic landscape through the bibliometric method, it was possible to detect not only knowledge gaps but also strategic opportunities for advancing the field, as well as to directly support the development of the research agenda presented in this study.

5 Socially responsible marketing (SRM) in Brazil and the fight against poverty

As presented, poverty is a structural problem in Brazil, and Socially Responsible Marketing (SRM) emerges as a strategy to align business objectives with positive societal impacts, particularly in vulnerable contexts (Kotler and Lee 2008). However, the application of SRM in poverty alleviation remains underexplored in national literature, with few studies focusing on this intersection (Laczniak and Shultz 2021). Thus, this study aims to map scientific production on the topic, identifying gaps and opportunities for future research through the proposal of a research agenda. To achieve this, we conducted a bibliometric review in the Web of Science database.

Although the initial search, which retrieved 130 articles, included studies related to the topic, most did not present a practical approach to poverty alleviation through Socially Responsible Marketing (SRM). Nevertheless, we were able to extract some relevant articles from this search. For instance, Ilzuka, Varela and Larroudé (2015) analyzed Rede Asta, one of Brazil's first social enterprises, investigating the challenges and dilemmas faced by this model. Meanwhile, Moser and Gonzalez (2015) explored Agroamigo, the largest rural microfinance program in Brazil, highlighting the need to incorporate climate risks into the program's strategies to better protect both clients and investors.

Hahn, Sherer and Lebioda (2024) compared businesses operating at the Base of the Pyramid (BoP) with Corporate Social Responsibility (CSR), highlighting the difficulty in distinguishing when business initiatives shift from merely reacting to stakeholder demands to actively functioning as social impact enterprises. In the Brazilian context, the study found that most research on BoP focuses on understanding the consumer, while the social impacts of businesses remain underexplored. Other studies have analyzed the role of corporate social responsibility, such as Pinto and Ribeiro (2004), who examined the Social Balance Sheets of the largest industries in Santa Catarina, and Teodósio and Comini (2012), who highlighted the challenges of inclusive businesses in Brazil.

Some practical cases emerged from this analysis, illustrating successful interventions in poverty alleviation. Iannotti, Lutter and Stewart (2014) examined campaigns aimed at encouraging egg consumption in low-income communities, while Withall, Jago and Fox (2011) analyzed programs that expanded access to physical activity among economically vulnerable

populations. Pattanayak, Yang and Praharaj (2009) demonstrated how financial incentives and social marketing campaigns were used to promote basic sanitation in rural communities in India. These studies reinforce the potential of Socially Responsible Marketing as a tool for promoting sustainable social change.

The selected studies in new selection, 26 articles, reflect different approaches to Socially Responsible Marketing, both in the public and private spheres, in emerging markets, as discussed below.

The study by Chance and Deshpande (2009) highlights how a consumer-centered approach can effectively promote structural social change, using the case of Brazil's National AIDS Program as an example. The prioritization of patient rights, collaboration with activist groups, and the implementation of innovative social marketing strategies demonstrate how social impact and economic viability can coexist. This perspective aligns with the work of Cheung and McColl-Kennedy (2019), who analyzed the case of refugees in Australia and argued that social change requires more than traditional managerial solutions, necessitating a critical perspective on the discourses and structures that perpetuate vulnerabilities. Both studies emphasize the need for social marketing strategies to operate at different levels (downstream, midstream, and upstream) to ensure long-lasting impacts.

Schembri (2019) expands on this view by demonstrating that food security policies, such as the Supplemental Nutrition Assistance Program (SNAP), not only ensure adequate nutrition but also positively affect sectors such as employment, housing, and mental health. Similarly, Arcos and Sarabio (2021) reinforce this perspective by analyzing the role of socially responsible marketing in the Ibero-American context, emphasizing transparency and ethics in business practices as essential elements for ensuring positive social impact.

Finally, Jagadale and Kemper (2022) explore the case of India, where macro social marketing (MSM) was used to redistribute cooking gas subsidies, promoting an innovative demarketing model that benefited vulnerable populations. The use of the 4As framework (affordability, acceptability, awareness, and availability) as a replacement for the traditional 4Ps demonstrates how social marketing can be adapted to specific challenges in emerging markets.

These studies converge in demonstrating that Socially Responsible Marketing can assume a pivotal role in shaping public policies and private initiatives aimed at combating

poverty. The diversity of the topics covered—such as health, food security, social inclusion, and access to energy—shows that Socially Responsible Marketing can be tailored to local needs, reinforcing its potential as a key tool for social transformation in countries like Brazil.

6 Research agenda

Although research has progressed in strengthening the concept of Socially Responsible Marketing, there is still room for a better understanding of its practical application in Brazilian organizations and marketing systems. It was challenging to find articles specifically associated with the SRM concept as formulated by Laczniak and Shultz (2021), and one possible reason is that the term is still relatively recent in literature. The literature review revealed research framed within related concepts, such as social marketing, inclusive businesses, macro-social marketing, and corporate social responsibility.

There are known limitations to the practical application of social marketing, which is why it is important to advance the debate on what can be done within this discipline to address social issues (Dietrich et al. 2022). Measuring social impact still requires significant methodological advancements, as it is essential for the social innovation sector to operate professionally and effectively (Barki et al. 2015). While financial outcomes are relatively easy to quantify, social and environmental results are much more difficult to assess (Ilzuka, Varela and Larroudé 2015).

This analysis reveals substantial opportunities for further inquiry for advancing the study of this discipline in the Brazilian context, particularly concerning poverty. In this regard, the following research questions are proposed to guide future studies:

Table 2: Research Questions for Future Studies on SRM and Poverty in Brazil

Category	SRM Element	Research Questions	References
Social Responsibility	Corporate Citizenship	What SRM practices can be applied to address social challenges in Brazil, drawing inspiration from the National AIDS Program, which combined social impact and economic viability?	Chance and Deshpande (2009); Cheung and McColl-Kennedy (2019); Ilzuka, Varela and

		How can the private sector play an active role in social responsibility, breaking away from the notion that social action in Brazil is fundamentally government-driven, as seen in the case of LPG subsidy redistribution in India?	Larroudé (2015); Jagadale and Kemper (2022); Karnani (2017).
Intervention Logics	Stakeholder Orientation	How can SRM strategies be used to maximize the impact of cash transfer programs, such as Bolsa Família, by ensuring greater purchasing power for beneficiary families and reducing government costs?	Arcos and Sarabio (2021); Chance and Deshpande (2009); Karnani (2017); Moser and Gonzalez (2015); Schembri (2019).
		How can the private sector adopt socially responsible marketing practices to offer essential goods, such as food and medicine, at more affordable prices to low-income populations without compromising its financial sustainability?	
Inclusive Markets	Stakeholder Orientation; Corporate Citizenship	Which sectors of the Brazilian economy, such as family farming and domestic services, have the greatest potential to adopt SRM practices and create economic inclusion for informal workers?	Hahn, Sherer and Lebioda (2024); Ilzuka, Varela and Larroudé (2015); Moser and Gonzalez (2015); Pinto and Ribeiro (2004); Teodósio and Comini (2012).
		How can SRM models be used to integrate informal workers into the formal market, providing better working conditions while also making such initiatives economically viable?	
Regionalization	Corporate Citizenship;	How can solutions developed in other markets, such as the LPG subsidy case in	Arcos and Sarabio (2021); Cheung and

	Stakeholder Orientation; Ecological Sustainability	India, be adapted to the Brazilian context?	McColl-Kennedy (2019); Jagadale and Kemper (2022); Karnani (2017); Pattanayak, Yang and Praharaj (2009); Schembri (2019).
		What metrics can be used to evaluate and enhance the impact of SRM in combating poverty, as analyzed in the social balance sheets of Brazilian industries?	

Source: Prepared by the authors (2025)

The Social Responsibility category seeks to understand how Socially Responsible Marketing (SRM) strategies can be practically applied to address social challenges in Brazil, especially in the context of poverty, which affects almost a third of the population. The Brazilian National AIDS Program, highlighted by Chance and Deshpande (2009), serves as an example of SRM. Prioritizing patient rights over patents and implementing consumer-centered strategies, such as partnerships with activist groups and mobile treatment units, not only reduced HIV prevalence to 0.7% in 2005 but also demonstrated economic viability, saving US$ 3.8 billion in hospitalizations and medications. This case reinforces the thesis that social marketing can create both economic and social value simultaneously, becoming a reference model for other initiatives.

In Brazil, social responsibility has traditionally been viewed as a government action, however this logic can and should be questioned. SRM strategies applied to profit-driven companies can challenge this paradigm and create space for innovative solutions where the private sector actively contributes to mitigating social problems without compromising its financial sustainability. The case of LPG subsidy redistribution in India, analyzed by Jagadale and Kemper (2022), illustrates how the private sector can play a significant role by adopting socially responsible practices. Inspired by this example, we question how companies and public policies can collaborate to implement SRM strategies that combine social impact and financial sustainability, breaking away from the traditional view that social responsibility is solely the state's duty. This category primarily aligns with the Corporate Citizenship pillar of SRM, as it addresses the firm’s broader role in promoting social welfare beyond narrow economic objectives.

The Intervention Logics category examines how SRM practices can be applied in specific markets to address poverty challenges in Brazil. A relevant example is the Bolsa Família program, which, according to the Federal Government's Social Communication Secretariat (2024), mobilized R$ 168.3 billion from the public budget in 2024. Despite its importance for millions of Brazilians in vulnerable situations, we question how it could be enhanced to generate even greater economic and social impact.

For instance, by analyzing the consumption profile of beneficiary families, it would be possible to identify markets where SRM practices could be applied to offer essential products at more affordable prices without compromising the financial health of the involved companies. A practical case is the commercialization of basic foods, represented in the Brazilian basic food basket, which includes items such as rice, beans, oil, and pasta. How could the companies producing these goods adjust their strategies to provide more affordable products to beneficiary families while maintaining financial sustainability? These questions align directly with the Stakeholder Orientation pillar, emphasizing the importance of understanding and serving the needs of marginalized groups while balancing stakeholder interests across sectors. This approach would not only directly benefit families in poverty but moreover create opportunities to reduce government costs related to welfare programs, creating a virtuous cycle between the public sector, private sector, and the population.

This logic reflects one of SRM's core principles, which is to align social impact with economic viability (Chance and Deshpande 2009; Karnani 2017). Furthermore, such initiatives could explore public-private partnerships to increase the purchasing power of beneficiary families or optimize the efficiency of cash transfer programs. One alternative could be developing awareness programs targeting this audience, ensuring that the resources from these programs are used more effectively. Thus, these interventions can represent an innovative strategy to tackle poverty in a broader and more sustainable manner.

The Inclusive Markets category focuses on identifying and expanding sectors with the potential to generate positive impact on poverty reduction through job creation and income generation. In 2022, Brazil had almost 40 million informal workers, moving about R$ 1.7 trillion (IPEA 2025). This scenario highlights the importance of integrating informal workers into initiatives that promote their inclusion in the formal economy, reducing structural inequalities.

In this sense, we must question which sectors have the greatest potential to promote social impact and how SRM can be applied to maximize these effects. Sectors such as family farming, handicrafts, informal creative industries, domestic services, and ride-sharing services have strong penetration in low-income communities and represent opportunities to apply SRM practices that link informal workers to the fight against poverty. For example, the formalization of these activities could be encouraged through public-private partnerships or business models that lower entry barriers into the formal market while providing access to social benefits and greater financial stability. This category is also closely related to Stakeholder Orientation, by focusing on the inclusion of often-overlooked actors, and to Corporate Citizenship, as it encourages businesses to assume broader responsibility for the societal impact of their value chains.

Studies such as those by Ilzuka, Varela and Larroudé (2015), who investigated Rede Asta in Brazil, and Moser and Gonzalez (2015), who analyzed the Agroamigo program, offer insights into how to integrate informal workers into sustainable business models. These examples show that SRM strategies can go beyond meeting basic needs, transforming informal activities into opportunities for generating economic and social value, thus expanding the market for these activities.

The Regionalization category reflects on the complexity and diversity of Brazil, highlighting regional disparities in terms of poverty, education, and per capita income. States such as São Paulo and Santa Catarina show high development indexes, while others, like Piauí and Maranhão, still face structural problems such as hunger and lack of basic sanitation. This disparity raises questions about how SRM practices can be adapted to reduce these regional inequalities and promote development in an equitable manner.

In addition to drawing inspiration from international cases, such as LPG subsidy redistribution in India (Jagadale and Kemper 2022), it is important to consider neighboring countries in Latin America, such as Venezuela, Colombia, and Ecuador, which face similar challenges related to poverty and food insecurity. The central question here is: how can we analyze the solutions implemented in these countries and adapt them to the Brazilian context? Which SRM practices applied in Latin America could reasonably be transferred or adjusted to the local context? This comparative analysis may offer new perspectives for public policies and business strategies aimed at poverty reduction.

Furthermore, we question whether there are already implemented solutions within Brazil that could be shared between states. Which successful regional initiatives could be expanded and applied to other states? By exploring both international experiences and local solutions, we aim to foster an integrated approach that promotes mutual learning and the adaptation of best practices to address social inequalities in Brazil.

In this case, the category Regionalization touches all three pillars of SRM: Corporate Citizenship (through public-private cooperation for social development), Stakeholder Orientation (by understanding diverse regional needs), and Ecological Sustainability (as regional inequalities are often intertwined with environmental vulnerabilities).

This set of categories and questions offers a solid direction for future research, linking existing literature and SRM core elements to the specifics of the Brazilian context. By considering both international and local examples, we aim to propose a research agenda that not only broadens academic knowledge on the topic but also provides practical guidelines for public and private initiatives aimed at combating poverty through socially responsible marketing.

7 Conclusions

This article examined the potential of Socially Responsible Marketing (SRM) as a tool for alleviating poverty in Brazil, a country marked by high levels of social inequality and a significant percentage of the population living below the poverty line.

The theoretical review highlighted the fundamental pillars of SRM—corporate citizenship, stakeholder orientation, and social and ecological sustainability—demonstrating how these elements provide an ethical and practical guide to align marketing practices with social expectations.

In this regard, the article also emphasized that while SRM has been widely discussed in international literature, there is a gap in the existing literature on SRM in Brazil, particularly in the context of poverty alleviation. This suggests that integrating SRM into public programs and policies could amplify its social impact and foster a more equitable transformation in marketing systems.

We also discussed how businesses and public policies can work together to promote social impact without compromising financial sustainability, drawing inspiration from cases

such as the fight against HIV in Brazil and the redistribution of subsidies in India. We analyzed the need for strategic interventions to optimize cash transfer programs, expand access to essential goods, and increase the efficiency of the private sector in providing inclusive solutions. Furthermore, we highlighted the potential of informal markets to contribute to poverty alleviation by exploring models that could integrate these workers into the formal economy.

The proposed research agenda aims to guide future studies to explore how SRM can be operationalized to promote sustainable social impacts. This research agenda proposes an exploration of the role of SRM in combating poverty in Brazil, structured around four central categories: Social Responsibility, Intervention Logics, Inclusive Markets, and Regionalization, thus offering direction for future investigations and practical applications.

In the Brazilian context, characterized by structural inequalities and systemic challenges, SRM can offer a pathway to align business practices with the promotion of social justice and equity. Therefore, it is hoped that this research agenda will inspire future efforts to deepen the understanding of SRM and its application in Brazil, contributing to the construction of more responsible marketing systems committed to collective well-being.

Thus, the research emphasizes the importance of integrating businesses, governments, and civil society in coordinated actions that ensure long-lasting impacts. The private sector, through SRM strategies, can complement public policies and develop socially responsible business models, promoting not only poverty reduction but also economic inclusion and social equity.

In conclusion, the article reaffirms the essential role of marketing as a social transformation agent, highlighting that SRM, by transcending purely financial objectives, has the potential to redefine the relationship between businesses, markets, and society. Firms that embrace SRM practices stand to not only advance poverty alleviation efforts but also enhance their ethical legitimacy and long-term sustainability within increasingly socially conscious markets, strengthening their reputation and competitiveness in the market. In this context, we recommend that future studies deepen the analysis of the impact measurement of these practices, exploring strategies that encourage the private sector's adherence to SRM in a sustainable and economically viable manner. Additionally, SRM can benefit from

interdisciplinary approaches, incorporating knowledge from economics, sociology, and public administration to broaden its applicability.

As for the limitations, the research analyzed only articles from the Web of Science database, which may not cover all academic production on SRM and poverty in Brazil. Therefore, we suggest studies in other databases for further analysis. Due to the study's focus on Brazil, its conclusions may not be fully applicable to other countries with distinct socioeconomic characteristics. Additionally, the reviewed studies on SRM predominantly focus on theoretical or conceptual approaches, while empirical research on its practical application in Brazil remains scarce. Nevertheless, we emphasize the importance of considering regional inequalities in Brazil and learning from the experiences of other Latin American countries. With this, we hope to contribute to advancing SRM as a practical tool for transforming social realities in Brazil.

References:

Arcos, D. A., & Sarabio, D. D. G. (2021). Socially responsible marketing strategies in a changing Ibero-American context. *Caderno Profissional de Marketing UNIMEP*, *9*(2), 45-60.

Barki, E., Comini, G., Cunliffe, A., Hart, S., & Rai, S. (2015). Social entrepreneurship and social business: Retrospective and prospective research. *RAE-Revista de Administração de Empresas*, *55*(4), 380-384.

Central Bank of Brazil. (2024). *Technical analysis of the online betting market in Brazil and the profile of bettors - Estudos especiais do Banco Central*. Banco Central do Brasil.

Chance, Z., & Deshpande, R. (2009). Putting patients first: Social marketing strategies for treating HIV in developing nations. *Journal of Macromarketing*, *29*(3), 220-232. https://doi.org/10.1177/0276146709335175

Chen, X., Chen, J., Wu, D., Xie, Y., & Li, J. (2016). Mapping the research trends by co-word analysis based on keywords from funded project. *Procedia computer science*, *91*, 547-555.

Cheung, L., & McColl-Kennedy, J. R. (2019). Addressing vulnerability: What role does marketing play? *Journal of Services Marketing*, *33*(6), 702-715. https://doi.org/10.1108/JSM-02-2019-0071

Dietrich, T., Hurley, E., Carins, J., Kassirer, J., Rundle-Thiele, S., Palmatier, R., ... Lee, N. (2022). 50 years of social marketing: Seeding solutions for the future. *European Journal of Marketing*, *56*(5), 1434-1463. https://doi.org/10.1108/EJM-04-2021-0256

Ferrell, L., & Ferrell, O. (2022). Broadening the definition of socially responsible marketing. *Journal of Macromarketing*, *42*(4), 560-566. https://doi.org/10.1177/02761467221123456

Freeman, R. E. (1984). *Strategic management: A stakeholder approach*. Pitman.

Georges, R., & Maia, K. (2017). *The Distance That Unites Us: A Portrait of Brazilian Inequalities.*. Oxfam Brasil.

Gregson, J., Foerster, S., Orr, R., Jones, L., Benedict, J., Clarke, B., Zotz, K. (2001). System, environmental, and policy changes: Using the social-ecological model as a framework for evaluating nutrition education and social marketing programs with low-income audiences. *Journal of Nutrition Education*, *33*(Suppl. 1), S4-S15. https://doi.org/10.1016/S1499-4046(06)60065-1

Hahn, I. S., Sherer, F. L., & Lebioda, L. (2024). Social Responsibility and Business at the Base of the Pyramid in Brazilian Multinational Companies: Intersection from a Meso-Level Perspective. *Brazilian Business Review*, *21*(3), 1-20. https://doi.org/10.15728/bbr.2024.21.3.1

Iannotti, L., Lutter, C., & Stewart, C. (2014). Eggs: The uncracked potential for improving maternal and young child nutrition among the world's poor. *Nutrition Reviews*, *72*(6), 355-368. https://doi.org/10.1111/nure.12107

Instituto Brasileiro de Geografia e Estatística. (2023). *Synthesis of Social Indicators: An Analysis of the Living Conditions of the Brazilian Population*. Estudos e Pesquisas - Informação Demográfica e Socioeconômica, 53.

Instituto Brasileiro de Geografia e Estatística. (2024). *Food security: 2023*. Rio de Janeiro: Tabela 1 - IBGE, Diretoria de Pesquisas, Coordenação de Pesquisas por Amostra de Domicílios, Pesquisa Nacional.

Ilzuka, E., Varela, C., & Larroudé, E. (2015). Social business dilemmas in Brazil: Rede Asta case. *Revista de Administração de Empresas*, *55*(4), 410-421.

Instituto de Pesquisa Econômica Aplicada (2025). *Unemployment, informality, underutilization, and inactivity*. IPEA. Available

at: https://www.ipea.gov.br/portal/retrato/indicadores/mercado-de-trabalho/desemprego-informalidade-subutilizacao-e-inatividade/apresentacao

Jagadale, S. R., & Kemper, J. (2022). 'Give it up!': A macro-social marketing approach to India's clean cooking fuel access. *Journal of Macromarketing*, *42*(1), 78-92. https://doi.org/10.1177/02761467211052345

Jolliffe, D., Mahler, D., Lakner, C., Atamanov, A., & Tetteh-Baah, S. (2022). *Assessing the impact of the 2017 PPPs on the international poverty line and global poverty*. Policy Research Working Paper, World Bank.

Karnani, A. (2017). The roles of the private and public sectors in poverty reduction. *Journal of Marketing Management*, *33*(11-12), 961-977. https://doi.org/10.1080/0267257X.2017.1329200

Kotler, P., & Lee, N. (2008). *Social marketing: Influencing behaviors for good*. Sage Publications.

Kotler, P., & Lee, N. (2009). Ending poverty: What's social marketing got to do with it? *Social Marketing Quarterly*, *15*(2), 134-140. https://doi.org/10.1080/15245000903038379

Kotler, P., Roberto, N., & Leisner, T. (2006). Alleviating poverty: A macro/micro marketing perspective. *Journal of Macromarketing*, *26*(2), 233-239. https://doi.org/10.1177/0276146706290926

Laczniak, G. R., & Shultz, C. J. (2021). Toward a doctrine of socially responsible marketing (SRM): A macro and normative-ethical perspective. *Journal of Macromarketing*, *41*(2), 201-231. https://doi.org/10.1177/02761467211013331

Laczniak, G., & Shultz, C. (2022). Socially responsible marketing (SRM): Broader, deeper, and ever greater. *Journal of Macromarketing*, *42*(4), 554-559. https://doi.org/10.1177/02761467221123455

Moser, R., & Gonzalez, L. (2015). Microfinanças e impactos das mudanças climáticas: O caso do Agroamigo no Brasil. *RAE-Revista de Administração de Empresas*, *55*(4), 422-433.

Nairn, A., Griffin, C., & Wicks, P. (2008). Children's use of brand symbolism: A consumer culture theory approach. *European Journal of Marketing*, *42*(5-6), 627-640. https://doi.org/10.1108/03090560810862534

Nill, A. (2022). Socially responsible marketing: A moving. *Journal of Macromarketing*, *42*(4), 567-572. https://doi.org/10.1177/02761467221123457

Organização das Nações Unidas. (2024). *About our work to achieve the Sustainable Development Goals in Brazil*. Available at: https://brasil.un.org/pt-br/sdgs

Pattanayak, S., Yang, J., & Praharaj, P. (2009). Shame or subsidy revisited: Social mobilization for sanitation in Orissa, India. *Bulletin of the World Health Organization*, *87*(8), 580-587. https://doi.org/10.2471/BLT.08.057323

Pinto, A., & Ribeiro, M. (2004). Social Balance: Evaluation of Information Provided by Industrial Companies Located in the State of Santa Catarina. *Revista Contabilidade & Finanças*, *15*(35), 21-34.

Pritchard, A. (1969). Statistical bibliography or bibliometrics. Journal of Documentation, 25(4), pp. 348-349.

Renton, M., Hooper, V., & Renton, A. (2024). Extending Layton's Marketing Systems for Future Transformation-Deepening Connections Between Marketing and Provisioning Systems: A Case-Based Approach. *Journal of Macromarketing*, *44*(2), 441-452.

República Federativa do Brasil. (2024). *Bolsa Família reaches 20.8 Million Families in December*. Disponível em: https://www.gov.br/secom/pt-br/assuntos/noticias/2024/12/bolsa-familia-chega-a-20-8-milhoes-de-familias-em-dezembro

Saatcioglu, B., & Corus, C. (2014). Poverty and intersectionality: A multidimensional look into the lives of the impoverished. *Journal of Macromarketing*, *34*(2), 122-132.

Santos, N. (2022). Socially responsible marketing to, with, and for impoverished populations. *Journal of Macromarketing*, *42*(4), 573-578. https://doi.org/10.1177/02761467221123458

Schembri, S. (2020). Food, poverty and health: The lived experience for SNAP recipients. *Journal of Social Marketing*, *10*(3), 321-335. https://doi.org/10.1108/JSOCM-10-2019-0152

Secretaria de Comunicação Social. (2024). *Federal Government transfers R$ 168.3 Billion through Bolsa Família in 2024*. Portal Gov.br. Available at:: https://www.gov.br/secom/pt-br/assuntos/noticias/2024/12/governo-federal-repassa-r-168-3-bilhoes-pelo-bolsa-familia-em-2024

Shapiro, S. J. (2012). Macromarketing teaching materials: A forty-year retrospective. *Journal of Macromarketing*, *32*(1), 1-5. https://doi.org/10.1177/0276146711428177

Soundararajan, V., Sahasranamam, S., Rogerson, M., Bapuji, H., Spence, L., & Shaw, J. (2024). Organizational engagement with poverty: A review and reorientation. *Journal of Management*, *50*(1), 1-30. https://doi.org/10.1177/01492063231123456

Teodósio, A., & Comini, G. (2012). Inclusive business and poverty: Prospects in the Brazilian context. *RAUSP Management Journal*, *47*(3), 410-421.

Tucker, J. L., & Anantharaman, M. (2020). Informal work and sustainable cities: From formalization to reparation. *One earth*, *3*(3), 290-299.

Withall, J., Jago, R., & Fox, K. (2011). Why some do but most don't: Barriers and enablers to engaging low-income groups in physical activity programmes. *BMC Public Health*, *11*(1), 1-10. https://doi.org/10.1186/1471-2458-11-507

World Bank. (2024). *Gini index*. Available at: https://data.worldbank.org/indicator/SI.POV.GINI

World Economic Forum. (2020). *The global social mobility report 2020: Equality, opportunity and a new economic imperative*. Disponível em: https://www3.weforum.org/docs/Global_Social_Mobility_Report.pdf

Advertising as Institutional Work: The Case of Casteless Collective in India

"Never trust anyone who says they do not see colour. This means to them, you are invisible."

— Nayyirah Waheed

Bhupesh Manoharan

Vipin Sreekumar

Akshay Narayanan

Krishanu Rakshit

In June 2017, a popular jazz club in India advertised a band gig called "Bhangi-Jumping," juxtaposing the name of a popular cannabis preparation, *bhang*, with bungee jumping. The ad garnered significant attention and publicity—albeit for all the wrong reasons. Unfortunately for the advertisers, who seemed blissfully unaware, "*bhangi*" is a casteist slur historically used to demean marginalized individuals engaged in manual scavenging. The ad's creators initially claimed ignorance, insisted they did not see or discriminate based on caste, and dismissed critics as "woke," small-minded, and aggressive. They later issued a brief apology, concluding with a pithy remark: *"Let's focus on the art, shall we?"* (Kappal 2017). This caste-blindness—akin to the race-blindness critiqued by Nayyirah Waheed—pervades Indian advertising space.

This incident exemplifies a broader societal issue: the majority of Indian society remains oblivious to the inequalities created by casteism, and this blindness has seeped into the institutions responsible for creating advertisements. Advertising in India has historically reinforced the caste system by perpetuating stereotypes and restricting certain castes to specific roles. As institutional actors, advertisers can either perpetuate or challenge casteism. To do so, they must engage with different dimensions of space—material, social, and symbolic—to either uphold or dismantle the institution of casteism.

Furthermore, advertising agencies—predominantly dominated by upper-caste individuals—have reinforced caste obliviousness within the industry. As a result, the advertising space is shaped by the narratives, traditions, actors, and symbols of higher castes, effectively excluding large segments of Indian society. This exclusion has far-reaching consequences. Many individuals from marginalized communities struggle to see themselves reflected in advertisements, reducing the effectiveness of ad campaigns. Regardless of advertisers' positioning intentions, many lower-caste consumers perceive these ads as

esoteric and premium due to their reliance on upper-caste symbols, rituals, and actors. There is also a growing resentment among marginalized communities over their exclusion from advertising spaces.

Advertising scholarship has long recognized the role advertising plays in shaping society (Drumwright 2019; Mick 2006). Growing inequalities and sustainability concerns have increasingly driven advertising scholars to examine the broader societal impacts—what Dahlen and Rosengren (2016) term the "extended effects" of advertising. This has led to the emergence of Transformative Advertising Research (TAR), a subfield that explores advertising's social implications and seeks to transform the system for better societal outcomes. TAR interrogates the ethical dimensions of advertising, going beyond legal compliance to address broader questions of social responsibility and sustainability. By necessity, TAR has evolved as a cross-disciplinary domain, engaging with advertising research at micro, meso, and macro levels. However, management scholars argue that it is also critical to examine how advertising, as an institution, can contribute to the societal exclusion of certain communities (Scaraboto and Fischer 2013). Existing research has explored various forms of marginalization in advertising, from fashion politics to sexuality (Manoharan and Varman 2018; Scaraboto and Fischer 2013). However, casteism remains an understudied area. This gap has led us to our core research questions: How does casteism create an elitist and non-inclusive advertising space? How can marketers foster inclusive advertising that challenges, rather than reinforces, casteist norms?

Our study explores advertising in the Indian music space to address these questions. We conduct an in-depth analysis of two contrasting events—*Margazhi Mahotsavam* and *The Casteless Collective*—to examine how space is used to either enforce or challenge inclusion in advertising. Using a qualitative approach, we analyze advertising patterns in these musical forms to understand how spatial dimensions are leveraged by different institutional actors. Our empirical material includes semi-structured interviews with stakeholders from *Margazhi Mahotsavam* and *The Casteless Collective* (2018–2024), non-participant observations of the musical events, and secondary document analysis.

Our findings reveal that the three dimensions of space—symbolic, material, and social—are actively used to either uphold or challenge casteism in advertising. We examine two opposing institutional actors: one that seeks to maintain the status quo and another that

actively disrupts it. We find that concepts of *inside* and *outside* are strategically employed by traditional Brahminical artisans to create an exclusive space for Carnatic music, reinforcing caste-based divisions at all three spatial dimensions. In contrast, new-age artisans seek to dismantle this divide, striving for legitimacy and recognition of lower-caste musical traditions. Margazhi Mahotsavam, deeply rooted in Brahminical traditions, employs advertising strategies that reinforce an insider-outsider dichotomy, positioning Carnatic music as an exclusive, upper-caste art form. The festival's advertisements prominently feature elite cultural symbols, Sanskritized imagery, and narratives that emphasize purity and tradition. These elements work together to create a sense of exclusivity, implicitly signaling that Carnatic music belongs to a select group while marginalizing those outside this privileged space.

On the other hand, Casteless Collective actively subverts these exclusionary practices by reclaiming space—symbolic, material, and social—through its advertising. The group's promotional materials feature diverse, grassroots (typically the marginalized) imagery that challenges dominant caste narratives. Their advertisements disrupt traditional notions of respectability and exclusivity, instead emphasizing themes of resistance, solidarity, and inclusivity. Through this approach, Casteless Collective seeks to democratize advertising spaces and make them more representative of India's diverse social fabric.

Both groups manipulate spatial dimensions to shape advertising narratives—either to reinforce or disrupt exclusionary practices. While Margazhi Mahotsavam leverages advertising to maintain the status quo and legitimize caste-based exclusion, Casteless Collective uses advertising as a form of counter-hegemonic institutional work, seeking to dismantle entrenched hierarchies and create a more inclusive space.

Through our study, we present multiple theoretical contributions. Firstly, we conceptualize advertising as an institutional work that shapes societal structures. We then elaborate on the impact of these advertising strategies on consumer well-being, and finally, we theorize how the advertising institutional work by the disruptive players is trying to influence consumer perceptions and contribute to broader shifts in societal norms.

References

Dahlen, M. and Rosengren, S. (2016). If advertising won't die, what will it be? Toward a working definition of advertising. Journal of Advertising, 45(3), 334-345.

Drumwright, M. E. (2019). Ethics and advertising theory. In Advertising theory (pp. 503-522). Routledge.

Kappal, B. (2017). Breaking the “savarna feminism” rules–how Raya Sarkar’s list of alleged harassers divided opinion in India’. New Statesman, 30.

Manoharan, B. and Varman, R. (2018). Spatializing purity and pollution: Stigma and consumption of beef in India. In Consumer Culture Theory (pp. 93-110). Emerald Publishing Limited.

Mick, D. G. (2006). Meaning and mattering through transformative consumer research. Advances in consumer research, 33(1).

Scaraboto, D. and Fischer, E. (2013). Frustrated fatshionistas: An institutional theory perspective on consumer quests for greater choice in mainstream markets. Journal of Consumer Research, 39(6), 1234-1257.

AN ANTICIPATED DYSTOPIA: RESPONSIBILIZATION AND OBESITY IN THE OZEMPIC ERA

Clara Freire Filgueiras Faro

Eliane Pereira Zamith Brito

Isabela Carvalho de Morais

ABSTRACT

Neoliberalism shifts body weight responsibility to individuals, ignoring contextual factors. Social media idealized images intensify it, promoting unattainable beauty standards. Herein, weight-loss drugs gain popularity. We investigate how responsibilization influences approaches to an obesity health crisis, focusing on new weight-loss drugs as market solutions and how cultural narratives shape it.

Keywords: social media, responsibilization, weight-loss medication, obesity.

INTRODUCTION AND LITERATURE REVIEW

A sense of unsettlement enlightened by neoliberal theory motivated this research: can individuals be responsible for their weight or the solutions they seek to manage it?

The emphasis on individual responsibility gained traction as neoliberal values reshaped citizens into consumer-subjects, promoting the idea of rational subjects and recasting societal issues as personal failings (Giesler and Veresiu 2014). State policies began promoting the moral virtues of “responsible” individuals, active agents managing their health through disciplined behaviors and market choices (Bajde and Rojas-Gaviria 2021).

Despite obesity being socially treated as an individual issue, it’s not simply a matter of calorie balance but the complex interplay of environmental, behavioral, and genetic factors, requiring systemic solutions (Deram and Villares 2009; World Obesity Federation 2024).

Social media intensifies these challenges by bombarding users with manipulated images that promote unattainable body ideals, fostering dissatisfaction and harmful comparisons (Ryding and Kuss 2019). Harriger et al. (2022) demonstrate how algorithms and body-editing tools can trigger disordered eating and Body Dysmorphic Disorder, which often leads to significant emotional distress (Ryding and Kuss 2019).

This scenario creates fertile ground for new weight-loss drugs, whose societal and cultural implications remain unexplored. This study investigates how the discourse of responsibilization influences consumer and societal approaches to obesity, focusing on the

rise of new weight-loss drugs as a phenomenon. We aim to contribute to a deeper understanding of how cultural narratives shape market solutions like weight-loss drugs within health crises such as obesity spread.

METHOD

The archival data collection began with key search terms such as *obesity*, *weight loss*, and *weight loss medication*, which led to a focus on emerging weight-loss medications. An immersion in Google trends, Google search, and Instagram triggered the algorithms to offer more content. The researcher embraced the manipulated algorithms of digital platforms, rather than attempting to "purify" the data, aligned with Rogers' (2024) perspective on digital methods.

The analysis employed the hermeneutical cycle, moving from data collection to analysis, progressively refining the understanding of the phenomenon (Thompson 1997).

The researchers read all the 200 collected materials and narrowed it to 57 articles, episodes, or films, relevant for responsibilization. They were analyzed using themes such as Obesity, Access Inequality, Medication Shortage, Side Effects, and Diet Culture. This iterative and interpretive process informed the results presented below.

RESULTS AND DISCUSSION

The framing of obesity as an individual failure, fueled by social media narratives, amplifies thinness as an ideal, ignoring systemic barriers and placing blame on individuals to conform to societal expectations. Thus, new weight-loss drugs offer optimism, but their high costs and portrayal as "bikini body" fixes exacerbate disparities, turning them into luxury.

Society often frames obesity as a result of "a lack of willpower, laziness, or a refusal to *eat less and move more*" (World Obesity Federation, n.d.), oversimplifying a complex human condition derived from psychosocial factors, genetic variations, and obesogenic environments—characterized by limited availability of affordable healthy food, insufficient time and space for exercise, and inadequate health systems (World Health Organization 2024).

Another primary driver of global obesity advance is the shift towards ultra-processed foods, which disrupt the body's ability to distinguish hunger from satiety. "It becomes clear that processed and ultra-processed foods create a true vortex of hunger" notes Professor Michael Lowe (Hari 2024).

Furthermore, metabolic transformations caused by being overweight make weight-loss attempts challenging. Facing weight gain, adrenal releases more cortisol, increasing hunger and concentrating fat in the abdomen. Visceral fat produces inflammation, which deregulates the hypothalamus and the satiety mechanism. All these and other metabolic changes make obesity a chronic disease resistant to lifestyle modifications (Luisa 2024b).

In this context, new weight-loss drugs, such as Tirzepatide, represent a new frontier in weight management (U.S. Food and Drug Administration 2023). Clinical trials have demonstrated promising outcomes for these drugs. According to Lee (2023), weekly subcutaneous injections (of Semaglutide) combined with lifestyle modifications resulted in an average 14.9% weight loss—significantly higher than the 2.4% loss achieved with lifestyle modifications alone.

Even WeightWatchers, long associated with behavior-based weight-loss strategies, adapted to this paradigm shift. By acquiring a GLP-1 provider and offering a GLP-1 program, the company acknowledged the limitations of willpower-driven approaches (Cottom 2024).

Nevertheless, there are downsides. CNN reports that 44% of Wegovy users reported nausea (Goodman 2023). The confirmed and speculative side effects list is vast (Blum 2024b; Dias A. 2024; Eisinger 2024; Goodman 2023; Maraccini 2024a; Prada 2024).

These drugs are used “by those who simply wanted to lose a bit of weight for summer” (Chaika and Oliveira 2024), responding to societal pressures surrounding thinness amplified by social media. The popularity of weight-loss drugs skyrocketed after stories about celebrities captured public attention (The Economist 2024; Weight of the World 2024a), leading to higher demand and leaving diabetes patients struggling to access essential medication (Macedo 2024; Sociedade Brasileira de Diabetes 2023).

Furthermore, these drugs remain prohibitively expensive. Without policies to improve accessibility, the risk is turning weight-loss medications into “luxury cosmeceuticals” (Cottom 2024), leaving obesity as a burden disproportionately affecting poorer populations.

The emblematic quote by Kyle Broflovski, a character in “South Park: The End of Obesity”, encapsulates the issue: “We have sugar companies, pharmaceutical companies, insurance companies figuring out how to make money out of our fucking health. How can anyone have willpower when all these forces are manipulating us every day?” (Parker 2024).

This cultural critique underscores the weight of responsibilization placed on individuals to achieve thinness despite systemic forces working against them.

Given the scale of the obesity progress, these drugs represent groundbreaking advancements. Despite known side effects, unknown long-term consequences, and concerns about their affordability, they have been heralded as one of the most significant pharmaceutical innovations of our time.

As the "Weight-Loss Revolution" unfolds, it is crucial to critically examine its broader effects, addressing medical outcomes and the cultural and systemic forces that shape how we understand and experience weight, health, and beauty. While the future remains uncertain, fostering equitable access and mitigating potential harms should remain central to the conversation.

REFERENCES

ABC Network. (2023). *An Oprah Special "Shame, Blame and the Weight Loss Revolution"* [Video]. Apple TV. https://tv.apple.com/us/movie/an-oprah-special-shame-blame-and-the-weight-loss-revolution/umc.cmc.1g70ijpj0qvlqgvvv8t7z46z0

Bajde, D. and Rojas-Gaviria, P. (2021). Creating responsible subjects: The role of mediated affective encounters. *Journal of Consumer Research*, *48*(3), 492-512.

Biernath, A. (2024, February). Por que Ozempic virou símbolo da desigualdade no tratamento da obesidade no Brasil [Why did Ozempic become a symbol of inequality in obesity treatment in Brazil]. *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrio/2024/02/por-que-ozempic-virou-simbolo-da-desigualdade-no-tratamento-da-obesidade-no-brasil.shtml

Blum, D. (2023, November 7). Por que psiquiatras começam a prescrever Ozempic? [Why do psychiatrists start prescribing Ozempic?] *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrioesaude/2023/11/por-que-psiquiatras-comecam-a-prescrever-ozempic.shtml

Blum, D. (2024a, February 16). Ozempic tem potencial para tratar alcoolismo, doença cardíaca e apneia do sono, sugerem pesquisadores [Ozempic has potential to treat alcoholism, heart disease, and sleep apnea, researchers suggest]. *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrio/2024/02/ozempic-tem-potencial-para-tratar-alcoolismo-doenca-cardiaca-e-apneia-do-sono-sugerem-pesquisadores.shtml

Blum, D. (2024b, March 18). Oprah takes on weight stigma in the Ozempic era. *The New York Times*. https://www.nytimes.com/2024/03/18/well/live/oprah-ozempic-weight-loss.html

Blum, D. (2024c, March 24). Ozempic Cuts Risk of Chronic Kidney Disease Complications, Study Finds. *The New York Times*. https://www.nytimes.com/2024/05/24/well/ozempic-kidney-disease-semaglutide.html?searchResultPosition=10

Bottallo, A. (2024a, July 3). Ozempic e outras drogas têm popularidade crescente, mas requerem atenção por efeito sanfona [Ozempic and other drugs are growing in popularity but require caution due to yo-yo effect]. *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrio/2024/07/ozempic-e-outras-drogas-tem-popularidade-crescente-mas-requerem-atencao-por-efeito-sanfona.shtml

Bottallo, A. (2024b, July 23). Obesidade precisa de atendimento multidisciplinar, diz chefe de pesquisa do Mounjaro [Obesity requires multidisciplinary care, says head of Mounjaro research]. *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrio/2024/07/obesidade-precisa-de-atendimento-multidisciplinar-diz-chefe-de-pesquisa-do-mounjaro.shtml

Bulhões, B. (2024d, October 4). Falta de Ozempic em farmácias leva pacientes a utilizar outro remédio [Ozempic shortage at pharmacies leads patients to use other drug]. *Estadão*. https://www.estadao.com.br/saude/falta-de-ozempic-em-farmacias-leva-pacientes-a-utilizar-outro-remedio-nprm

Carvalho, A. Ozempic some das farmácias brasileiras em outubro, indisponibilidade pode durar até final do ano [Ozempic disapears from brazilian pharmacies in october, unavailability may last until the end of the year]. (2024, October 24). *Valor Econômico*. https://valor.globo.com/empresas/noticia/2024/10/24/ozempic-some-das-farmacias-brasileiras-em-outubro-indisponibilidade-pode-durar-ate-fim-do-ano.ghtml

Chaika, A and Oliveira, D. (2024, September 9). Bye-bye body positivity, hello 'heroin chic'?. *Deutsche Welle*. https://www.dw.com/en/bye-bye-body-positivity-hello-heroin-chic/a-70026120

Cherrier, H., and Türe, M. (2023). Tensions in the enactment of neoliberal consumer responsibilization for waste. *Journal of Consumer Research*, *50*(1), 93-115.

Cottom, T. (2024, March 20). Oprah, Ozempic and us. *The New York Times*. https://www.nytimes.com/2024/03/20/opinion/oprah-ozempic-special-obesity.html

Culliford, E. (2021, July 1). Pinterest proíbe todos os anúncios de produtos para perda de peso. [Pinterest bans all weight-loss products advertisement]. *Folha de São Paulo*. https://www1.folha.uol.com.br/tec/2021/07/pinterest-proibe-todos-os-anuncios-de-produtos-para-perda-de-peso.shtml

D'Amour, A. (2024, February 24). Toxic beauty and girls. *The New York Times*. https://www.nytimes.com/2024/02/24/opinion/toxic-beauty-girls.html

"Demanda maior do que a prevista", explica fornecedora de Ozempic sobre o desabastecimento em farmácias ["Demand bigger than forecasted", expalins Ozempic supplier about shortage at pharmacies]. (2024, October 24). *Zero Hora*. https://gauchazh.clicrbs.com.br/saude/noticia/2024/10/demanda-maior-do-que-a-prevista-explica-fornecedora-de-ozempic-sobre-o-desabastecimento-em-farmacias-cm2ncg3l2001r013uxrkjf9hm.html

Deram, S. and Villares, S. M. (2009). Genetic variants influencing effectiveness of weight loss strategies. *Arquivos Brasileiros de Endocrinologia and Metabologia*, *53*, 129-138.

Devaux, M., Sassi, F., Church, J., Cecchini, M. and Borgonovi, F. (2011). Exploring the relationship between education and obesity. *OECD Journal: Economic Studies* 2011(1), 1-40.

Dias, A. (2024, April 17). Ozempic use appears to be changing people's personalities —experts think they know why. *New York Post.* https://nypost.com/2024/04/17/health/experts-reveal-why-ozempic-appears-to-change-peoples-personalities/

Dias, P. (2024, May 21). Ladrões de Ozempic fazem farmácias reduzirem estoque do remédio em SP [Ozempic thieves force pharmacies to reduce drug stock in São Paulo]. *Folha de São Paulo*. https://www1.folha.uol.com.br/cotidiano/2024/05/ladroes-de-ozempic-fazem-farmacias-reduzirem-estoque-do-remedio-em-sp.shtml

Easedale, S. (2024, November 21). 'I thought I'd die after injecting black market anti-obesity drug'. *BBC*. https://www.bbc.com/news/articles/c2e7vegnw2do

Eisinger, A. (2024, May 29). Experts warn of dangerous weight loss drug side effect: reckless behavior. *New York Post*. https://nypost.com/2024/05/29/health/experts-warn-of-dangerous-weight-loss-drug-side-effect-reckless-behvavior/

The economics of thinness (Ozempic edition). (2024a, October 24). *The Economist*. https://www.economist.com/finance-and-economics/2024/10/24/the-economics-of-thinness-ozempic-edition

FDA approves new medication for chronic weight management. (2023, November 8). *U.S. Food and Drug Administration - FDA News Release*. https://www.fda.gov/news-events/press-announcements/fda-approves-new-medication-chronic-weight-management

Garattoni, B and Cordeiro, T. (2023, May). O outro lado do Ozempic [The other side of Ozempic]. *Super Interessante*, p. 20-31.

George Santos usa Ozempic pela segunda vez para emagrecer: "Ganhei 18 quilos de volta" [George Santos uses Ozempic for the second time to lose weight: 'I gained 18 kilos back']. (2024, May 21). *Folha de São Paulo*. https://f5.folha.uol.com.br/voceviu/2024/05/george-santos-usa-ozempic-pela-segunda-vez-para-emagrecer-ganhei-18-quilos-de-volta.shtml

Giesler, M., and Veresiu, E. (2014). Creating the responsible consumer: Moralistic governance regimes and consumer subjectivity. *Journal of Consumer Research*, *41*(3), 840-857.

GLP-1s like Ozempic are among the most important drug breakthroughs ever. (2024b, October 24). The Economist. https://www.economist.com/briefing/2024/10/24/glp-1s-like-ozempic-are-among-the-most-important-drug-breakthroughs-ever

Goodman, B. (2023, July 25). They took blockbuster drugs for weight loss and diabetes. Now their stomachs are paralyzed. *CNN*. https://edition.cnn.com/2023/07/25/health/weight-loss-diabetes-drugs-gastroparesis/index.html

Hari, J. (2024, June 9). Ozempic me ensinou que pensamos a obesidade da forma errada [Ozempic taught me we think about obesity the wrong way]. *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrio/2024/06/ozempic-me-ensinou-que-pensamos-a-obesidade-da-forma-errada.shtml

Harriger, J. A., Evans, J. A., Thompson, J. K. and Tylka, T. L. (2022). The dangers of the rabbit hole: Reflections on social media as a portal into a distorted world of edited bodies and eating disorder risk and the role of algorithms. *Body Image*, *41*, 292-297.

Hartmann, A. S., and Buhlmann, U. (2017). Body dysmorphic disorder. *Handbook of DSM-5 disorders in children and adolescents*, 233-248.

It's not just obesity. Drugs like Ozempic will change the world. (2024c, October 26). *The Economist*. https://www.economist.com/leaders/2024/10/24/its-not-just-obesity-drugs-like-ozempic-will-change-the-world

Kolata, G. (2024, February 8). Usuários de medicamento para emagrecer registram redução de pressão arterial [Weight-loss drug users report reduced blood pressure]. *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrio/2024/02/usuarios-de-medicamento-para-emagrecer-registram-reducao-de-pressao-arterial.shtml

Kolata, G. (2024b, November 22). Kennedy Jr. doesn't like Ozempic. Here's what he can do about it. *The New York Times*. https://www.nytimes.com/2024/11/22/health/rfk-jr-ozempic-drugs-fda.html

Kozinets, R. V., and Gretzel, U. (2024). Netnography evolved: New contexts, scope, procedures and sensibilities. *Annals of Tourism Research*, *104*, 103693.

Lapid, N. (2024, July 4). Estudo relaciona Wegovy e Ozempic a distúrbio ocular que pode comprometer a visão [Study links Wegovy and Ozempic to eye disorder that can impair vision]. *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrio/2024/07/estudo-relaciona-wegovy-e-ozempic-a-disturbio-ocular-que-pode-comprometer-a-visao.shtml

Lee, B. (2023, June 16). 'Ozempic finger' and 'Wegovy butt': two new names for weight loss effects. *Forbes*. https://www.forbes.com/sites/brucelee/2023/06/16/ozempic-finger-and-wegovy-butt-two-new-names-for-weight-loss-effects/

Lemos, N. (2024, April 2) A febre do Ozempic e a volta do corpo super magro. *Deutsche Welle*. https://www.dw.com/pt-br/a-febre-do-ozempic-e-a-volta-do-corpo-super-magro/a-68725799

Luisa, I. (2024a, February 12). Ozempic: Os riscos de usar apenas para perder uns quilinhos [Ozempic: The risks of using it just to lose a few kilos]. *Revista Saúde*.

https://saude.abril.com.br/medicina/ozempic-os-riscos-de-usar-apenas-para-perder-uns-quilinhos

Luisa, I. (2024b, August). O furo na Obesidade [A breakthrough in obesity]. *Veja Saúde*, p. 28-41.

Macedo, Vitoria. (2024, November, 13). Falta de Ozempic em farmácias leva pacientes à busca por alternativas [Ozempic shortage at pharmacies leads patients to search for alternatives]. *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrioesaude/2024/11/falta-de-ozempic-em-farmacias-leva-pacientes-a-busca-por-alternativas.shtml

Maraccini, G. (2024a, March 27). Cabeça de Ozempic: Entenda consequências do uso do remédio para emagrecer [Ozempic head: Understand the consequences of using weight-loss medication]. *CNN Brasil*. https://www.cnnbrasil.com.br/saude/cabeca-de-ozempic-entenda-consequencias-do-uso-do-remedio-para-emagrecer/

Maraccini, G. (2024b, May, 29). Ozempic: veja riscos de usar o remédio para fins estéticos [Ozempic: know the risks of using the drug to aesthetical purposes]. *CNN Brasil.* https://www.cnnbrasil.com.br/saude/ozempic-veja-riscos-de-usar-o-remedio-para-fins-esteticos/?hidemenu=true

McGuire, M. T., Wing, R. R., Klem, M. L., Lang, W. and Hill, J. O. (1999). What predicts weight regain in a group of successful weight losers?. *Journal of consulting and clinical psychology*, *67*(2), 177.

Medicamento semaglutida para tratar obesidade é cada vez mais usado para fins estéticos; conheça os riscos da automedicação [Semaglutide medication for obesity treatment increasingly used for aesthetic purposes: Learn the risks of self-medication]. (2024, February 4). *Fantástico*. https://g1.globo.com/fantastico/noticia/2024/02/04/medicamento-semaglutida-para-tratar-obesidade-e-cada-vez-mais-usado-para-fins-esteticos-conheca-os-riscos-da-automedicacao.ghtml

Mercatelli, V. (2024, September). Arsenal contra a obesidade [Arsenal against obesity]. *Viva Saúde*, p. 12-19.

“Não vai ter mais gordinho no RJ”, diz Paes sobre Ozempic na rede pública [“There will be no more chubbies in Rio” says Paes about Ozempic in the public health system]. (2024,

October, 1). *CNN Brasil*. https://www.cnnbrasil.com.br/nacional/nao-vai-ter-mais-gordinho-no-rj-diz-paes-sobre-ozempic-na-rede-publica/

The New York Times. (2024a, November 1). The Weight of the World [Video]. Apple TV. https://tv.apple.com/us/show/the-new-york-times-presents/umc.cmc.2k0dwuv0elcqh40dxzqwawv7m

The New York Times presents: 'Weight of the world'. (2024b, November 22). *The New York Times*. https://www.nytimes.com/2024/11/22/NYT-Presents/ozempic-weight-of-the-world.html

Obesity and overweight. (2024, March 1). *World Health Organization*. https://www.who.int/news-room/fact-sheets/detail/obesity-and-overweight

Ozempic: farmacêutica confirma 'disponibilidade intermitente' do medicamento até o fim do ano [Ozempic: pharmaceutical company confirms medication 'intermittent unavailability' until the end of the year]. (2024a, September 3). *O Globo*. https://oglobo.globo.com/saude/noticia/2024/09/03/ozempic-demanda-elevada-leva-a-escassez-do-medicamento-nas-farmacias-do-brasil.ghtml

Ozempic, Saxenda: 1 a cada 5 pessoas recupera 100% do peso perdido um ano após interromper tratamento, mostra análise [Ozempic, Saxenda: 1 in 5 people regain 100% of the weight lost a year after stopping treatment, analysis shows]. (2024b, February 5). *O Globo*. https://oglobo.globo.com/saude/medicina/noticia/2024/02/05/ozempic-saxenda-1-a-cada-5-pessoas-recupera-100percent-do-peso-perdido-um-ano-apos-interromper-tratamento-mostra-analise.ghtml

Ozimek, P., Lainas, S., Bierhoff, H. W. and Rohmann, E. (2023). How photo editing in social media shapes self-perceived attractiveness and self-esteem via self-objectification and physical appearance comparisons. *BMC psychology*, *11*(1), 99.

Parker, T (Writer and Director). (2024, May 24). *Park: The End of Obesity* [Video]. Paramount+. https://www.paramountplus.com/br/movies/video/qj85sEFHqwWVCqEnIe6X3WKy3Xn4wH5l/

Posicionamento da SBD sobre falta do Ozempic [SBD's position on the Ozempic shortage]. (2023, February 17). *Sociedade Brasileira de Diabetes*. https://diabetes.org.br/posicionamento-da-sbd-sobre-falta-do-ozempic/

Pick, R. (2023, June, 8). Ozempic has won, body positivity has lost. And I want no part of it. *The Guardian.* https://www.theguardian.com/lifeandstyle/2023/jun/08/ozempic-weight-loss-body-positivity

Prada, L. (2024, December 18). Ozempic could be blinding people trying to lose weight. *Vice*. https://www.vice.com/en/article/ozempic-could-be-blinding-people-trying-to-lose-weight/

Rajanala, S., Maymone, M. B. and Vashi, N. A. (2018). Selfies—living in the era of filtered photographs. *JAMA facial plastic surgery* 20(6), 443-444.

Ridder, H. G. (2014). Qualitative Data Analysis. A Methods Sourcebook 3 rd Edition.

Ritchie, H. and Roser, M. (2024, January). Obesity. *Our World Data*. https://ourworldindata.org/obesity

Rogers, R. (2024). Doing digital methods.

Ryding, F. C. and Kuss, D. J. (2020). The use of social networking sites, body image dissatisfaction, and body dysmorphic disorder: A systematic review of psychological research. *Psychology of Popular Media*, *9*(4), 412.

The roots of obesity. (n.d.). *World Obesity Federation*. https://www.worldobesity.org/what-we-do/our-policy-priorities/the-roots-of-obesity

Satija, B and Mathews, E. (2024, April 12). Órgão regulador da Europa descarta relação de Ozempic com ideações suicidas [European regulatory agency rules out link between Ozempic and suicidal thoughts]. *Folha de São Paulo*. https://www1.folha.uol.com.br/equilibrio/2024/04/orgao-regulador-da-europa-descarta-relacao-de-ozempic-com-ideacoes-suicidas.shtml

Schlangenstein, M. (2023, September 30). Weight loss drugs like Ozempic, Wegovy would reduce airlines' costs. *Business Standard*. https://www.business-standard.com/world-news/weight-loss-drugs-like-ozempic-wegovy-would-reduce-airlines-costs-123093000091_1.html

Thompson, C. J. (1997). Interpreting consumers: A hermeneutical framework for deriving marketing insights from the texts of consumers' consumption stories. *Journal of marketing Research*, *34*(4), 438-455.

Therrie, B. (2024, October 2). Ele perdeu 40 kg ao entender que obesidade é doença, não falta de vergonha [He lost 40 kilos when understood obesity is a desease and not lazyness

and shamelessness]. *Viva bem*. https://www.uol.com.br/vivabem/noticias/redacao/2024/10/02/ele-emagreceu-apos-entender-que-obesidade-e-doenca-nao-falta-de-vergonha.htm

Tiggemann, M., Anderberg, I., and Brown, Z. (2020). Uploading your best self: Selfie editing and body dissatisfaction. *Body image*, *33*, 175-182.

Varella, D. (2024, April 10). Os problemas do emagrecimento à custa de drogas [The problems with drug-induced weight loss]. *Folha de São Paulo*. https://www1.folha.uol.com.br/colunas/drauziovarella/2024/04/os-problemas-do-emagrecimento-a-custa-de-drogas.shtml

Weber, T. (2024, November 19). Ozempic could crush junk food industry. But it is fighting back. *The New York Times Magazin*e. https://www.nytimes.com/2024/11/19/magazine/ozempic-junk-food.html

Weiner, J. (2023, December 17). Oprah, weight loss, and America's obsession. *The New York Times*. https://www.nytimes.com/2023/12/17/opinion/oprah-weight-loss.html

World Obesity Atlas 2024. (2024, March). *World Obesity Federation*. https://data.worldobesity.org/publications/WOF-Obesity-Atlas-v7.pdf

Balancing Traditions with Modernity: How Indian Women Practice Karwa Chauth

Geetakshi Girotra

Mahsa Ghaffari

Cultural traditions, such as the Hindu festival Karwa Chauth, are deeply rooted in patriarchal structures in societies like India (Vivek Nema and Sharma 2024). These traditions, which emphasize female devotion and sacrifice, are often reinterpreted, modified, or even rejected, particularly when they intersect with contemporary discourses on gender equality, autonomy, and individual rights (Giddens 1991). While some women continue to preserve the tradition, others question its gendered implications. Karwa Chauth, a traditional ritual, is being reinterpreted through digital platforms like Instagram, Facebook, YouTube, and Twitter (Bennet, Segerberg, and Knüpfer 2018). Women are redefining these traditional practices, balancing them with modern values of gender equality and partnership, and highlighting global struggles to maintain cultural identity while supporting feminist beliefs (Butler 1990).

To explore how consumers, reconcile tensions between tradition and modernity, we conducted 11 interviews with Indian women from diverse demographics—ranging from influencers and homemakers to urban professionals—along with a qualitative content analysis of social media discourses (Creswell 2013).

The findings highlight four themes that women in the digital age use to practice their feminist and modern identities while observing Karwa Chauth: 1) Reaffirming Traditional Practices through Redefining its Logic, 2) Critically Questioning and Rejecting the Practice, 3) Modifying the Ritual for Gender Equality, and 4) Engaging with the Festival while Resisting Commercialisation. While some women attempt to redefine Karwa Chauth by viewing it as a celebration of cultural heritage, familial expectations, or personal beliefs about the ritual's significance (Connell, 2009), others question and reject the tradition altogether. For those who continue to observe it, fasting is seen as an expression of love and devotion rather than an act of obedience. Participating in the festival enables them to connect with their culture, traditions, and family heritage.

Karwa Chauth is evolving beyond its religious roots, becoming a space for emotional connection, self-care, and family bonding (Bauman 2000). Many women no longer adhere strictly to fasting rituals; instead, they focus on the sentimental and symbolic aspects of the festival, engaging in non-traditional practices such as celebrating with friends or using the day

for personal reflection. Conversely, those who critically question the practice view it as societal pressure and often face criticism from relatives and online communities. They engage with others who do not follow the tradition and share their perspectives on social media. The study also reveals that some individuals modify the tradition to make it more gender-equality friendly, including mutual fasting between partners and shifting the focus from the wife's sacrifice to shared dedication in marriage (Jackson and Scott 2001). This redefinition of Karwa Chauth emphasizes partnership rather than a one-sided obligation. Additionally, some women resist the Commercialisation of the festival, criticizing brands for exploiting it for profit. They choose to avoid extravagant spending on attire and jewellery, instead promoting a more meaningful and personal approach to the tradition. Social media plays a dual role in this process—it empowers women but also fosters gender-based consumerism (Hossain Shahriar 2022).

The study illustrates how digital platforms shape traditions, gender identity, and social norms, and how modern Indian women are transforming patriarchal rituals into spaces for discussion, exchange, and new meanings. These findings underscore the role of social media as a liminal space (Lim, Bork-Hüffer, and Yeoh 2016) where women can gain empowerment and initiate change in a society dominated by traditions and social pressures. This study contributes to the understanding of the intersection between culture, gender identity, and digital media. It advances theories on how traditions evolve and how women in modern societies navigate tensions between patriarchy and feminist ideologies (Giddens 1991; Butler 1990). The findings highlight how social media serves as both a platform for empowerment and a space where traditional practices are debated, reshaped, or resisted. This work deepens our understanding of how women negotiate cultural identity in a rapidly changing digital landscape, providing new insights into gender studies, cultural anthropology, and advertising (Bennet, Segerberg, and Knüpfer 2018; Jackson and Scott 2001). From a practical perspective, this study offers valuable insights for brands and advertisers seeking to understand the evolving dynamics of cultural festivals in India. Understanding how women engage with and modify traditional practices allows brands to create more nuanced and respectful marketing strategies that align with modern values of gender equality. Additionally, the study highlights the role of social media as a platform for both empowerment and critique, which can be leveraged by organizations and advocates to promote gender equality while resisting

Commercialisation. This research also has practical implications for policymakers and social reformers interested in promoting gender equality while respecting cultural heritage. It offers strategies for fostering conversations around gendered traditions and creating spaces for women to challenge societal norms, all while balancing the preservation of cultural identity with progressive values.

References

Amerikaner, L., Buck, C., Moore, R., Martinez, J. and Mueller, C. (2025). Administrative burdens as a family affair: Navigating racialized safety-net systems post-welfare reform. *Journal of Marriage and Family*. [online] Available at: https://onlinelibrary.wiley.com/doi/abs/10.1111/jomf.13064.

Bauman, Z. (2013). *Liquid modernity*. John Wiley & Sons.

Bennett, W. L., Segerberg, A., & Knüpfer, C. B. (2018). The democratic interface: Technology, political organization, and diverging patterns of electoral representation. Information, Communication & Society, 21(11), 1655-1680.

Butler, J., & Trouble, G. (1990). Feminism and the Subversion of Identity. Gender trouble, 3(1), 3-17.

Chandawarkar, A. (2024). Caste-ing Women in Bollywood: A Reading of Caste (In)visibility in the Life Writing of Bollywood's Upper Caste Women. *Studenttheses.uu.nl*. [online] Available at: https://studenttheses.uu.nl/handle/20.500.12932/46465.

Connell, R. (2013). *Gender and power: Society, the person and sexual politics*. John Wiley & Sons.

Creswell, J. W., & Poth, C. N. (2016). *Qualitative inquiry and research design: Choosing among five approaches*. Sage publications.

Giddens, A. (2023). Modernity and self-identity. In *Social Theory Re-Wired* (pp. 477-484). Routledge.

Hossain Shahriar (2022). *Gender Transculturation: Navigating Market-Mediated Contesting Gender Ideologies in Consumer Acculturation*. [online] Lund University. Available at: https://portal.research.lu.se/en/publications/gender-transculturation-navigating-market-mediated-contesting-gen.

Jackson, S., & Scott, S. (Eds.). (2002). *Gender: A sociological reader*. Psychology Press.

Lim, S. S., Bork-Hüffer, T., & Yeoh, B. S. (2016). Mobility, migration and new media: Manoeuvring through physical, digital and liminal spaces. *New Media & Society*, *18*(10), 2147-2154.

Vivek Nema and Sharma, P.M. (2024). Impact of Commercialisation on Our Culture: with Special Reference to Popular Indian Festivals. *Indian Journal of Mass Communication and Journalism*, [online] 4(1), pp.27–31. Available at: https://www.ijmcj.latticescipub.com/wp-content/uploads/papers/v4i1/E108203050924.pdf.

Becoming the black body: how affective atmospheres drive empowerment practices in Brazilian black activism

Vanessa Arcoverde

Flavia Zimmerle

Miriam Leite Farias

Bianca Ferreira Silva

We followed Magalhães Lopes et al. (2021)'s work about collective formations in activists' consumer movements, to investigate how affective atmospheres, once they are established in activist practices, can drive the formation of the collective black body. Based on the assumptions that affective forces produce a "surface effect", emerging through emotions and materializing in a certain sociopolitical context (Ahmed 2004) and that the collective body could be a composition of affective intensities (Magalhães Lopes 2018), we aimed to capture the effects of emotions that permeate empowerment practices and constitute the atmosphere that drive female black activism in Brazil.

Our study took place in the city of Caruaru, located in the Northeast region of Brazil. In this peripheral city, there is a group of black female consumers who acknowledge themselves as activists and recurrently work in social media platforms to reduce the oppression exerted on their black bodies. Their empowerment practices involve pedagogical and protective actions. To capture the affective traces on the becoming of their collective body, we relied on the subjections that determine who one is, therefore, it conforms through the continuous knowledge-power relationship and resistance on the processes of subjectivation (Foucault 1980). The process of subjectivation of these women, once established in activist empowerment practices, were driven by affective intensities entangled in black consumers' collective emotions.

Our analysis demonstrates, that, in the case of these black women, their becomings took shape in affective (re) action to the colonial normativity in place (Magalhães Lopes 2023), which subjected them to racism. The becoming of the black body covers an intertwined bodily dynamic in which the subjectivation process disclosed the lived experiences of black women, and, with it, the emotions, habitual experiences, and the set of non-discursive records (Hill et al. 2014), which are the "surface effect" (Ahmed 2014) that materializes affective intensity.

In social media, the continuously identification of black women with the community constituted a way to define moral bonds. In addition, the mutual support shared by them, provided greater engagement with the cause, which establishes a form of moral subject (Foucault 1987). The feelings disseminated in the collective are shared by the group. The (dis)comfort (Magalhães Lopes 2023) felt by them when subjected to racism can promote support, acceptance, and respect for the ancestors. It is transformed into emotions that function as drivers of conduct, redefining self-understanding and constituting an affective atmosphere capable of shaping empowerment practices. Our work covers a context of resistance that challenges the violence imposed against black bodies (intersectionality of gender, social class, and race). By capturing affective encounters of black activists, we understood how (dis)comfort, as an emotion, can create a force pushing against a white-colonial normativity, allowing the becoming of bodies. Although yet not a completely legitimized body in Brazil, the (dis) comfort was found in black women lived experiences, and it can generate change in the social space.

References

Ahmed, S. (2004), "Collective Feelings: Or, the Impressions Left by Others," Theory, Culture & Society, 21(2), 25–42.

Ahmed, S. (2014), The Cultural Politics of Emotion. 2nd ed. Edinburgh, Scotland: Edinburgh University Press.

Foucault, M. (1980), Microfísica del poder (Microphysics of power). Madrid: La Piqueta, 189p.

Foucault, M. (1987), Surveiller et punir: Naissance de la prison (Discipline and Punish: The Birth of the Prison). Paris: Gallimard.

Hill, T., Canniford, R., and Mol, J. (2014), "Non-representational marketing theory," Marketing Theory, 14(4), 377-394.

Magalhães Lopes, M. (2018), "The Making of Us: How affects shape collective bodies resisting gentrification," doctoral dissertation, Stockholm Business School, Stockholm University.

Magalhães Lopes, M. (2023), "Marking humans for consumption, whilst erasing others: Affective becomings and the workings of (dis)comfort," Journal of Consumer Culture, 23(4), 949-970.

Magalhães Lopes, M., Hietanen, J., and Ostberg, J. (2021), “Why do crowds cause trouble? Exploring affective instability in collectivity,” Marketing Theory, 21(4), 539-560.

Betting on Knowledge: Framing Sports Gambling as a Legitimate Behavior

Gabriela Nogueira Rauber

Daniela Zacarchenco Paredes

José Sarkis Arakelian

Lilian Soares Pereira Carvalho

Eliane Pereira Zamith Brito

The rise of online gambling, particularly sports betting, has revolutionized the entertainment landscape worldwide, with Brazil emerging as one of the most dynamic markets in recent years. Fueled by advancements in technology, accessibility of mobile platforms, and the country's deep-rooted passion for sports, especially football, the online sports betting market in Brazil is expected to generate approximately US$600 million in revenue in 2024 and US$1.99 billion by 2029, compounding an annual growth rate of 27.10% (Statista 2024).

Beyond economic impacts, the growing prevalence of betting platforms has heightened the risks of gambling addiction and financial distress (Vieira et al. 2023). However, unlike traditional forms of gambling, which often carry negative connotations, sports betting is frequently seen as a more socially acceptable practice because participants perceive they take informed bets and stay in control of the situation (Hing et al. 2018).

This study seeks to understand how bettors frame sports betting as a socially acceptable activity by examining the dual perceptions of betting through theoretical lenses of legitimacy and stigma (Hampel and Tracy 2019; Patterson et al. 2019). Legitimacy refers to a positive normative evaluation of an entity by its audience (Suchman 1995). Moral legitimacy is based on whether the organization's activities align with the audience's assessment of what "the right thing to do" for society is (Hampel and Tracy 2019). On the other hand, stigma represents a negative normative judgment by an audience. These concepts can be seen as two ends of a spectrum of moral evaluation, ranging from profound approval (elevation) to profound disapproval (stigmatization), with legitimacy representing a positive assessment (Hampel and Tracy 2019).

We conducted semi-structured interviews (Brinkmann 2014) with 16 Brazilian male bettors, who represent more than 69% of the market (Propmark 2023). Informants were initially selected among our contacts; then, we expanded the sample through snowballing

(Creswell 2013). Interviews were conducted remotely and lasted, on average, 25 minutes, with audio recorded. The audios were transcribed, resulting in 155 single-spaced pages. We analyzed the data iteratively using content analysis methods. Two independent coders reviewed the interview transcripts and coded the data inductively. We had many rounds of refinement of the coding process.

As Hing et al. (2018) describe, most interviewees demonstrated a deep connection between their long-standing interest in soccer and their betting activities, using their sports knowledge to make informed bets. This expertise gives them confidence and a sense of accomplishment: “I have been following soccer since I was young... I thought this years-long knowledge of soccer could help me start betting (I16).” The feeling of validation bettors experience when winning is profound. As I12 noted, “You feel that you understand the subject when you get something unexpected right.”

Conversely, losses evoke frustration and a perceived lack of control: “[I would say], It is all over, I have lost everything. I would get angry, stressed and would declare that I am done betting (I1)." The compensatory cycle is inherent in sports betting, where the pursuit of recouping losses and the intermittent reinforcement of winning keep consumers trapped in a continuous loop of betting, returning with renewed hope.

Participants make important distinctions between various forms of gambling and among different types of bettors, highlighting the pervasive 'us vs. them' dynamic of stigma (Link and Phelan 2001). Sports bettors often try to legitimize their activities by emphasizing the skill and strategy involved, contrasting these with the impulsivity and irrationality stereotypically associated with other forms of gambling. This dichotomy suggests a perceived hierarchy wherein sports betting is considered an intellectual behavior.

Games of chance, such as slot machines and casino games, are often associated with addiction and financial harm: "In casino betting, you know you are programmed to lose. The house always wins in sports betting, it is a different world for me because it depends on the game's outcome" (I14). Bettors believe they are in control of the situation in sports betting, while other types of betting are pure chance or manipulation to get your money. "Many betting houses present themselves as sports betting houses, but in reality, they are casinos, which I have never been involved, I don’t like it, there is no way you can win against the system, right?" (I7).

These insights underline a prevalent notion among bettors that sports betting, deemed reliant on knowledge and analytical skills, should be exempt from the stigma typically associated with more chance-driven gambling activities.

Expanding on the 'us vs. them' mentality, some bettors perceive themselves as casual participants controlling their financial engagement, viewing betting primarily as entertainment: "I also saw it as entertainment. I'm not going out; I'm just going to watch the game at home. I'm going to put R$30 in so I can watch the game there with more excitement" (I3). This sentiment reflects a self-assured moderation in their gambling behavior, which they believe sets them apart from more compulsive and impulsive gamblers. Nevertheless, the illusion of control can sometimes lead to behaviors indicative of gambling addiction.

Finally, the interviews emphasized the communal aspects of betting, where individuals often participate in betting activities with friends or within dedicated groups. This socio-cultural dimension enhances betting enjoyment and fosters a sense of belonging among bettors: "My friends started betting and sharing winnings, and that influenced me (I8)," highlighting how social circles can significantly impact betting behaviors.

Like any community, these groups possess unique characteristics that create a sense of unity and distinguish them from outsiders. Some interviewees shared a notable aspect: their use of the term "odd," which refers to the numerical probability of an outcome occurring in a sports event. This linguistic characteristic reinforces their sense of belonging to the group and recognition by others.

This study shows that knowledge and perceived strategic capabilities associated with sports contribute to legitimate sports betting in the bettors' community and reinforce the stigma associated with chance-based gambling. Although gambling is morally illegitimate in many parts of society, it is morally upheld among gamblers. Because moral judgment is fluid, societal forces can alter the status of gambling among different groups.

References

Brinkmann, S. (2014), Unstructured and semi-structured interviewing. In The Oxford handbook of qualitative research.

Creswell, J. W. (2013), Qualitative Inquiry and Research Design: Choosing Among Five Approaches. Thousand Oaks: Sage.

Hampel, C. and Tracey, P. (2019), Introducing a spectrum of moral evaluation: Integrating organizational stigmatization and moral legitimacy. *Journal of Management Inquiry*, *28*(1), 11-15.

Hing, N., Li, E., Vitartas, P., and Russell, A. M. (2018), On the spur of the moment: Intrinsic predictors of impulse sports betting. *Journal of Gambling Studies*, *34*, 413-428.

Link, B. G. and Phelan, J. C. (2001), Conceptualizing stigma. *Annual review of Sociology*, *27*(1), 363-385.

Patterson, K. D., Hudson, B. A., and Helms, W. S. (2019), Introduction: A dialog on stigma versus legitimacy, and how they relate to organizations and their actors. *Journal of Management Inquiry*, *28*(1), 3-4.

Propmark. (2023), Qual é o público que faz apostas esportivas no Brasil. Accessed on December 19, 2024 on https://propmark.com.br/qual-e-o-publico-que-faz-apostas-esportivas-no-brasil/

Statista (2024), Online sports betting - Brazil. Accessed on December 10, 2024 on https://www.statista.com/outlook/amo/online-gambling/online-sports-betting/brazil#analyst-opinion

Suchman, M. C. (1995), Managing legitimacy: Strategic and institutional approaches. Academy of Management Review, 20, 571-610.

Vieira, J. L., Coelho, S. G., Snaychuk, L. A., Parmar, P. K., Keough, M. T., and Kim, H. S. (2023), Who makes in-play bets? Investigating the demographics, psychological characteristics, and gambling-related harms of in-play sports bettors. *Journal of Behavioral Addictions*, *12*(2), 547-556.

Beyond Age: Technology, Identity, and the 60+ Consumer

Daniel Probaos Crisafulli

Eliane Pereira Zamith Brito

Clara Freire Filgueiras Faro

Daniela Zacarchenco Paredes

Abstract

This paper explores the elderly consumer identity in the context of technology adoption and use. Findings show that it is difficult for elderly consumers to recognize their need for new tech products, and tech optimism drives purchases, while personal *ensemble* can turn initial tech discomfort into enthusiasm. Technology also plays a role in maintaining independence and reconnecting with the world.

Keywords: Gray Consumption, Technology Consumption, Identity, Etarism, Ensemble

Introduction and Literature Review

The *Longeratividade* study (Lenoir et al. 2017) estimates that Brazil has 56 million consumers aged 60+, with a purchasing power of R$1.6 trillion. By 2060, this group is expected to reach 73 million, reshaping the country's demographic pyramid due to declining birth rates and increasing longevity (IBGE, 2022).

Despite their growing presence, older consumers, especially those over 60, still face prejudice. They are often stereotyped as dependent and fragile, though many remain healthy, active, and financially independent. However, their unique consumption preferences and expectations are frequently overlooked (Minó and Mello 2021).

Grounded in consumer experience theories (**Schmitt 1999**; Brakus, Schmitt and Zarantonello 2009; Verhoef et al. 2009), this study follows Lemon and Verhoef's (2016) framework, analyzing pre-purchase, purchase, and post-purchase stages to explore the purchasing experiences of Brazilian consumers aged 60+ regarding technology products. Research shows that digital inclusion improves mental health, reduces loneliness, and enhances social connections, fostering greater autonomy and helping to combat age-related stigma (**Costa et al., 2021**).

Therefore, this study aims to answer: How do the elderly consume technology and how can it help rescuing their identity?

Method

Semi-structured interviews were conducted with 10 individuals aged 60–80 to explore their purchasing pathway for technology products. The initial interviewees were selected from the researcher's social network, followed by snowball sampling. Inclusion criteria required participants to be 60+, active, legally capable, from diverse backgrounds, and to have purchased a technology product within the past 180 days for accurate recall.

Interviews were recorded with consent and transcribed for analysis. An iterative abductive process refined coding structures, allowing evolving insights. Multiple rounds of content analysis were performed, moving from specific findings to broader conclusions (Creswell 2013).

Results

The results indicate that the acceptance and use of technology by consumers over 60 years old are significantly influenced by factors such as curiosity, proactivity, and the pursuit of social connection. These factors lead to a substantial increase in both adoption and satisfaction with digital technologies. Initially, many older adults resist new technologies due to discomfort and insecurity. However, continuous support, particularly from close contacts and retail attendants, helps them overcome these initial barriers.

The study revealed that consumers over 60 do not always recognize their purchasing needs. They may not feel compelled to adopt the latest technologies out of novelty (Belk et al. 2021). So, they tend to maintain familiar technologies or upgrade them gradually rather than making abrupt transitions to new technologies and may not realize that outdated technology is hindering their experience and making them vulnerable. Additionally, ease of use, accessibility, and the practical relevance of technology in daily life are more influential in adoption than technical features alone. One interviewee, for instance, visited a retail store to finalize a purchase after conducting thorough research: "I wanted the same device I had, just with more memory, without taking risks with new technologies." Technical limitations were also a decisive factor, as in the case of another interviewee who needed a new phone because her old model could no longer support app updates, preventing her from using previously available applications.

Consumers over 60 engage in extensive research before purchasing technology-related products, to ensure informed choices that meet their specific needs. This pre-purchase phase helps reduce uncertainty and vulnerability facing retailers and salesmen. Verhoef (2021) emphasizes the importance of creating positive digital experiences, and older consumers often require more time to familiarize themselves with new technologies and ensure product compatibility with their expectations and abilities.

Face-to-face retail interactions are highly valued, as older consumers appreciate personalized assistance. This aligns with the concept of a "Socially-Driven Ecosystem," characterized by the presence of social actors such as family, friends, and other consumers. Social connection and belonging are primary drivers of customer experience.

Family or technical support during purchase significantly enhances the shopping experience for older consumers. According to Lemon and Verhoef (2016), support from family and friends reduces anxiety and increases consumer confidence. This assistance can take various forms, such as accompanying seniors to physical stores or when a salesman helps to migrate the data to the new phone. Barnhart and Peñaloza (2013) highlight the concept of an "ensemble"—a support network that fosters mutual influence among older adults and those around them, facilitating consumption activities and shaping aging identity. Our analysis showed that, adding to the usual support around the elderly, the retail could be part of this ensemble as well, if it provides appropriate support.

Barnhart and Peñaloza (2013) also introduce the dual concept of "old/not old" in aging identity. Age positioning within the ensemble depends on how group members attribute "old" or "not old" identities based on demonstrated physical and cognitive abilities. Technology enables older consumers to feel "not old," as it enhances their independence. For instance, one interviewee, who had difficulty reading after cataract surgery, received a tablet from his wife. The device significantly improved his quality of life, shifting his identity from "old," dependent, and unable to read to "not old," independent, and capable. Therefore, technology has a role not only to maintain independence and reconnect with the world as we knew, but also as an instrument for maintaining the “not old” identity.

Aleti et al. (2020) note that older consumers with curiosity and proactivity seek detailed product information before purchasing, leading to increased willingness to explore new technologies. However, excessive information can cause stress and hinder decision-

making (Gilly et al. 2012; Aleti et al. 2020). Some interviewees expressed confusion over numerous product options and technical specifications. Despite these challenges, many older consumers display growing curiosity and willingness to explore devices that facilitate daily life, provided they receive adequate support.

This study builds to the understanding of the role of technology in 60+ consumers quality of life and wellbeing by showing how the ensemble can contribute to technology adoption and therefore to the re-establishment of individual independence and conexion with the world, as well as the impact on this group's sense of identity.

References

Aleti, T., Brennan, L., Parker, L., and Winzar, H. (2020). Technology and Age: Insights into the Role of Socialization Agents in the Context of Older Consumers Learning Information and Communication Technologies. *Journal of Consumer Affairs*, 54(1), 226-256.

Anand, P., Coe, E., Cordina, J., and Rivera, S. (2016). Understanding consumer preferences can help capture value in the individual market. McKinsey White Paper.

Barnhart, M. and Peñaloza, L. (2013). Negotiating Old Age Identity in the Elderly Consumption Ensemble. *Journal of Consumer Research*, 39(6), 1133-1153.

Belk, R., Weijo, H., and Kozinets, R. V. (2021). Enchantment and perpetual desire: Theorizing disenchanted enchantment and technology adoption. Marketing Theory, 21(1), 25-52.

Bitner, M. J., Booms, B. H., and Tetreault, M. S. (1990). The service encounter: diagnosing favorable and unfavorable incidents. Journal of marketing, 54(1), 71-84.

Bitner, M. J.; Ostrom, A. L. and Morgan, F. N. (2008). Service blueprinting: A practical technique for service innovation. *California Management Review*, 50(3), 66-94.

Bolton, R. N. and Lemon, K. N. (1999). A dynamic model of customers' usage of services: Usage as an antecedent and consequence of satisfaction. *Journal of Marketing Research*, 36(2), 171-186.

Brakus, J. J., Schmitt, B. H., and Zarantonello, L. (2009). Brand experience: what is it? How is it measured? Does it affect loyalty? *Journal of marketing*, *73*(3), 52-68.

Branco, T. V. C., and Alfinito, S. (2024). Vulnerability of Older Adults in the Context of Food Purchase. *Journal of Macromarketing*, 44(1), 14-29.

Castro, M., Drumond, E., Araujo, F. and Duarte, A.L.F. (2021). *Consumidor da Terceira Idade*:

Estudo Bibliométrico dos Artigos Publicados no Brasil. http://doi.org/10.12819/2021.18.03.1

CNDL Brasil. (2024). *86% dos internautas fizeram compras por meio de aplicativos de loja no último ano, aponta estudo da CNDL/SPC Brasil*. Disponível: https://site.cndl.org.br/86-dos-internautas-fizeram-compras-por-meio-de-aplicativos- de-loja-no-ultimo-ano-aponta-estudo-da-cndlspc-brasil/. Acesso em 22 de março de 2024.

Collis, J.; Hussey, R. *Pesquisa em administração*: Um guia prático para alunos de graduação e pós-graduação. Tradução por Lucia Siminini. 2 ed. Porto Alegre: Bookman, 2005.

Costa, D. E. S., de Andrade Rodrigues, S., Alves, R. D. C. L., da Silva, M. R. F., Bezerra, A.

Creswell, J.W. *Research design*: Qualitative, quantitative, and mixed methods approaches. London: Sage Publication, 2013.

D. C., dos Santos et al. (2021). A influência das tecnologias na saúde mental dos idosos em tempos de pandemia: uma revisão integrativa. *Research, Society and Development,* 10(2), 1-12. DOI: 10.33448/rsd- v10i2.12198. Disponível em: https://rsdjournal.org/index.php/rsd/article/view/12198. Acesso em: 5 mars. 2024.

Dalmoro, M. and Vittorazzi C. (2016). Trajetórias de Consumo: O Sujeito-Consumidor de Serviços Bancários na Terceira Idade. *Revista de Administração Contemporânea*, 20(4), 439-458.

De Keyser, A., Lemon, K. N., Klaus, P., and Keiningham, T. L. (2015). A framework for understanding and managing the customer experience. *Marketing Science Institute working paper series*, *85*(1), 15-121.

Fontenla, J. C. E. and De Almeida, L. (2020). *The Importance of Positive Word-of-Mouth (PWOM) in Leisure Services Consumption by Third Age Consumers*. Disponível em: https://doi.org/10.7819/rbgn.v22i3.4073.

Fundação Dom Cabral (2020). *Longevidade Trendbook*. Volume 1. *FDC*. Disponível em: https://materiais.hype50mais.com.br/estudo-fdc-longevidade-negocios

Gahler, S. H., Klein, J. F., and Paul, M. (2023). Customer Experience: Conceptualization, Measurement, and Application in Omnichannel Environments. *Journal of Service Research*, 26(1), 43-59.

Gapminder.org. (2022). *Life Expectancy vs. Income*. Disponível em: https://www.gapminder.org/tools/#$chart-type=bubbles&url=v1. Acesso em 22 de

março de 2024.

Gentry, J. W., Phillips, J., and Barnhart, M. (2014). Everyday Consumption and Perceptions of Oldness: Barnhart and Peñaloza Extended. *LA-ACR Conference*.

Gibbs, G.R. *Thematic Coding and Categorizing, Analyzing Qualitative Data*. SAGE Publications Ltd., London, 2007. Disponível em: http://dx.doi.org/10.4135/9781849208574. Acesso em: 11 jul. 2024.

Gilly, M. C., Wolfinbarger Celsi, M., Schau, H. J., and Walsh, G. (2012). Overcoming Obstacles to Technology Use Within a Resistant Consumer Group. *Journal of Consumer Affairs*, 46(1), 62-89.

Grewal, D., Levy, M., and Kumar, V. (2009). Customer experience management in retailing: An organizing framework. *Journal of Retailing*, 85(1), 1-14.

Hamilton, R. and Price, L. L. (2019). Consumer Journeys: Developing Consumer-Based Strategy. *Journal of the Academy of Marketing Science*, 47(1), 27-45.

Homburg, C., Jozić, D., and Kuehnl, C. (2017). Customer experience management: toward implementing an evolving marketing concept. *Journal of the Academy of Marketing Science*, 45, 377-401.

IBGE – Instituto Brasileiro de Geografia e Estatística. (2010). *Censo Demográfico 2010*. Disponível em: https://www.ibge.gov.br/estatisticas/sociais/populacao/9109-projecao- da-populacao.html?=&t=resultados. Acesso em 20 de maio de 2022.

Kantar Ibope Media – Beyond Age para além da Idade (2022). Disponível: https://www.kantaribopemedia.com/wp-content/uploads/2022/11/Beyond-Age-2022_Brasil_Kantar-IBOPE-Media.pdf. Acesso em 22 de março de 2024.

Lemon, K. N. and Verhoef, P. C. (2016). Understanding Customer Experience Throughout the Customer Journey. *Journal of Marketing*, 80(6), 69-96.

Lenoir, C. Zuin, L., Dornellas, N. and Hércules, P. (2017) Instituto Locomotiva. *Pesquisa Longeratividade*. 2017. Disponível em: https://www.ilocomotiva.com.br/longeratividade2018. Acesso em 18 de novembro de 2021.

Lipkin, M. and Heinonen, K. (2022). Exploring How Ecosystem Actors Shape Customer Experience. *Journal of Services Marketing*, 36(3), 377-389.

Marketing Science Institute. (2016). *MSI research priorities* 2016–17. Disponível em https://www.msi.org

McCarthy, J. and Wright, P. (2004). *Technology as Experience*. Google Scholar Digital Library Digital Library.

Minó, Nádia Marota and Mello, Rita Márcia Andrade Vaz de (2021). Representação da velhice: reflexões sobre estereótipos, preconceito e estigmatização dos idosos. Oikos: Família e Sociedade em Debate, v. 32, n. 1, p.273-298, 2021

Mueller, R. A. (2019). Episodic narrative interview: Capturing stories of experience with a methods fusion. *International Journal of Qualitative Methods*, v. 18, p. 1–11. Disponível em: https://journals.sagepub.com/doi/pdf/10.1177/1609406919866044. Acesso em: 11 jul. 2024.

Mundo Marketing (2016). *Beleza na Terceira Idade*. Disponível em: https://www.mundodomarketing.com.br/terceira-idade-carencia-de-produtos-e-atendimento-exclusivos/

Neslin, S. A. et al. (2006). Challenges and Opportunities in Multichannel Customer Management. *Journal of Service Research*, 9(2), 95–112.

Our World in Data. (2021). *Life Expectancy.* Disponível em: https://ourworldindata.org/life-expectancy. Acesso em 22 de março de 2024

Pccinelli, N. M., Goodstein, R. C., Grewal, D., Price, R., Raghubir, P., and Stewart, D. (2009). Customer experience management in retailing: understanding the buying process. *Journal of Retailing*, 85(1), 15-30.

Rahman, S. M., Carlson, J., Gudergan, S. P., Wetzels, M., and Grewal, D. (2022). Perceived Omnichannel Customer Experience: Concept, Measurement, and Impact. *Journal of Business Research*, 144, 471-486.

Reichheld, F. and Markey, R. (2011). The ultimate question 2.0: How net promoter companies thrive in a customer-driven world. *Harvard Business Review Press*.

Richardson, A. (2010). Using customer journey maps to improve customer experience. *Harvard Business Review*, 15(1), 2-5.

Rosenbaum, M. S.; Otalora, M. L. and Ramirez, G. C. (2017). How to create a realistic customer journey map. *Business Horizons*, 60(1), 143-150.

Schau, H. J., Muñiz Jr, A. M., and Arnould, E. J. (2009). The Resurgence of Identity-Inspired

Consumption in Retirement. Journal of Consumer Research, 36(3), 255-276.

Solomon, M. R. (2011). *O Comportamento do consumidor*: Comprando, possuindo e sendo. Bookman Editora.

State of Search Brasil. *Como a busca influencia o dia a dia do brasileiro* (2021). Disponível em: https://br.hedgehogdigital.co.uk/blog/state-of-search-brasil-2/. Acesso em 22 de março de 2024.

Tax, S. S., McCutcheon, D., and Wilkinson, I. F. (2016). The Service Delivery Network (SDN): A Customer-Centric Perspective of the Customer Journey. *Journal of Service Research*, 16(4), 454-470.

Verhoef, P. C. (2021). Customer Experience Creation in Today's Digital World. In *Customer Experience Management* (pp. 3-16). Routledge.

Zomerdijk, L. G. and Voss, C. A. (2010). Service design for experience-centric services. *Journal of Service Research* (pp.67-82)

Beyond Competition: Complementary Institutional Logics in the Globalization of Soccer Markets

José Sarkis Arakelian

Eliane Pereira Zamith Brito

Isabela Carvalho de Morais

In Latin America, soccer is more than a sport; it is a cultural institution deeply tied to social identity, collective memory, and national pride. In Brazil, local soccer clubs embody tradition and belonging, while the globalization of the sport has introduced European clubs as aspirational global brands. This study examines how consumers navigate these dual influences, analyzing the coexistence of local and global brands through the lens of institutional logics. Using a qualitative, multi-method approach—including netnography, media analysis, and in-depth interviews—we identify two dominant logics shaping soccer consumption: Belonging, rooted in tradition and community, and Entertainment, driven by global branding and digital engagement. Rather than displacing local identities, global soccer brands align with the entertainment logic, complementing rather than competing with the deep-rooted belonging associated with local clubs. We introduce the concept of negotiated complementarity to explain how consumers integrate these plural logics, contributing to discussions on market dynamics, institutional pluralism, and global-local brand dynamics. These insights offer strategic implications for brands operating in culturally complex markets and expand macromarketing perspectives on market shaping in the Global South.

Keywords: Market Dynamics; globalization; macromarketing, institutional logics, global-local dynamics, soccer consumption, Latin America

Introduction

In Latin America, soccer is more than a sport; it is a powerful cultural institution deeply intertwined with social identity, collective memory, and national pride. Nowhere is this more evident than in Brazil, where soccer exists alongside Carnival as a defining element of cultural life (DaMatta 2009). More than a recreational activity, soccer structures social belonging (Toledo 2010) and fosters an imagined community (Damo 2008), making it an essential site for studying macromarketing dynamics in the region.

The economic and cultural impact of soccer extends beyond local contexts, as globalization and commercialization have transformed the sport into a key economic sector and branding powerhouse (Giulianotti 2015). European clubs have evolved into transnational corporations, strategically deploying consumer-oriented marketing practices to expand their presence in markets like Brazil (Walsh and Giulianotti 2001). This increasing hyper-commodification (Giulianotti and Robertson 2012) raises critical questions about how local and global brands coexist, how consumers negotiate their loyalties, and how market systems evolve in the face of multiple institutional logics.

Institutional theory provides a useful lens for examining these dynamics, as it helps us understand how markets are embedded in cultural, social, and symbolic meanings (Ertimur and Coskuner-Balli 2015; Giesler and Fischer 2017). Research on institutional logics has explored how market transformations arise from shifting norms and practices (Humphreys 2010), how conflicts emerge between competing logics (Lee and Lounsbury 2015), and how marginalized groups resist dominant market structures (Martin and Schouten 2014; Scaraboto and Fischer 2013). However, little attention has been given to contexts where consumers navigate multiple logics without privileging or transforming them.

To explore these questions, we applied a qualitative, interpretive multi-method approach to analyze how Brazilian soccer fans balance the deep cultural heritage of local clubs with the aspirational appeal of international brands. Our study conceptualizes local clubs as "local brands" tied to cultural identity and European clubs as "global brands" representing globalized consumption. Data collection consisted of 736 pieces of sports media content (2,026 pages), netnographic observations of consumer communities and industry professionals on social networks (Kozinets 2010), 21 in-depth expert interviews (1,636 minutes, 582 pages transcribed), and 15 phenomenological interviews with consumers (697 minutes, 279 pages transcribed).

We followed an iterative and inductive process of data analysis, using axial coding to identify patterns and relationships (Miles, Huberman, and Saldaña 2013). Two key themes emerged—Entertainment and Belonging—alongside sub-themes such as Industry Structure, Access, and Connection. Cross-author analysis ensured theoretical reliability and consistency (Spiggle 1994).

Our findings contribute to macromarketing research by demonstrating how plural institutional logics coexist and shape consumer decision-making in ways that go beyond traditional notions of conflict or substitution (Ertimur and Coskuner-Balli 2015; Humphreys 2010). Rather than replacing local teams, global soccer brands align with the entertainment logic, complementing the deep-rooted belonging associated with local clubs. This research challenges binary perspectives on global-local market dynamics (Thompson and Arsel 2004) by illustrating how brands can reinforce their value propositions through overlapping logics.

Furthermore, this study extends prior research on market evolution (Martin and Schouten 2014) by showing that plural logics can develop in a complementary and negotiated manner rather than through outright resistance or transformation (Scaraboto and Fischer 2013). The concept of "negotiated complementarity" introduced in this research highlights how consumers navigate both emotional and entertainment-driven consumption practices, contributing to broader discussions on institutional pluralism in market systems.

These insights provide valuable implications for brands operating in plural markets. Local clubs can strengthen emotional bonds by emphasizing their cultural significance, while global clubs can position themselves as aspirational brands without eroding local identities. By acknowledging and embracing plural logics, brands can develop more effective engagement strategies in markets characterized by strong cultural and economic intersections.

Ultimately, this study advances macromarketing theory by illustrating how institutional logics shape consumer practices in dynamic, non-disruptive ways. It offers a novel perspective on global-local market interactions, expanding current discussions on institutional pluralism, consumer agency, and brand strategy. Future research could explore similar dynamics in other industries, such as fashion and food markets, where global and local forces intersect in complex ways.

Theoretical foundation

Formal organizational structures develop within a highly institutionalized context (Meyer and Rowan 1977). They represent a social order or pattern that emerges upon reaching a certain state or property (Jepperson 1991). These structures shape and mediate social choices, establish common sense, and structure actions and rule systems (Powell and DiMaggio 1991). Institutions can be understood as durable and multifaceted entities

composed of symbolic elements, social activities, and material resources. They encompass three key properties—regulatory, normative, and cultural-cognitive elements—which, when combined with relevant activities and resources, provide stability and meaning to social life, serving as the pillars of legitimacy (Scott 2008). Legitimacy, in turn, derives from the generalized perception or assumption that an entity's actions are desirable or appropriate within a social system constituted by norms, values, beliefs, and definitions (Suchman 1995).

Scott and Meyer (1991) define the institutional field as a social sector comprising organizations within the same field of activity, which can be identified by the similarity of their services and the influence of key stakeholders—such as suppliers, customers, regulators, and financial institutions. The institutionalization process unfolds within this field (DiMaggio and Powell 1983). As the field becomes structured, interactions among organizations generate forces that drive convergence, making them increasingly similar. This process, known as isomorphism, refers to the pressures that compel organizations to adopt common practices, thus reinforcing homogeneity within the field (DiMaggio and Powell 1983). There is a logical connection between legitimacy and isomorphism: the more predominant an organizational structure—whether explicitly defined or tacitly assumed—the more legitimate it becomes. Consequently, the diffusion of organizational characteristics serves as an indicator of legitimacy, further reinforcing isomorphism (Thornton and Ocasio 2008).

Regarding levels of analysis, Thornton, Ocasio and Lounsbury (2012) explain that institutions operate at macro, meso, and micro levels. However, given the complexity and variety of social phenomena, distinctions between these levels remain somewhat arbitrary (Scott 2008). In response to this complexity, the institutional logic perspective, originally developed by Friedland and Alford (1991), seeks to explain the success or failure of institutionalization processes. This perspective acknowledges that legitimacy is a cultural element, albeit not necessarily the dominant one, and incorporates a multi-level approach to institutional analysis (Thornton et al. 2012).

Institutional logics can be understood as symbolic and material principles that structure, guide, and constrain thoughts, decisions, and behaviors of individuals and organizations. These logics emerge from historically embedded patterns of material practices, assumptions, values, beliefs, and rules (Thornton and Ocasio 1999). They serve as a link between cognition, individual agency, and the socially constructed structures of institutional

rules and practices (Thornton and Ocasio 2008). As a result, institutional logics offer a valuable theoretical lens for understanding the plurality of norms and beliefs in organizations, as well as the processes underlying institutional formation and change (Cloutier and Langley 2013).

Ertimur and Coskuner-Balli (2015) contribute to the study of market dynamics and institutional logic by examining how brands navigate multiple institutional logics. Their study of the U.S. yoga market highlights a fundamental challenge for brands operating in pluralistic institutional environments: determining the appropriate combination of logics and designing a broad repertoire of brand practices that reflect the social expectations of a fragmented and diverse market. The authors argue that cultural capital and strategic positioning, aligned with a brand's assumed identity, play a crucial role in securing legitimacy within a given market segment.

Thompson and Arsel (2004) also join this discussion by analyzing the interpretation of processes between local and global brands, demonstrating how brands influence cultural hetero-hybridization within the context of glocalization (Robertson 1995). In their study of Starbucks, they illustrate how global brands and local cultures interact to create cultural heterogeneity. Their analysis builds on Robertson's (1992) concept of the "universalization of particularism"—a global process that facilitates the emergence of local particularities in different societies—and the "particularization of universalism", whereby the global culture is appropriated within local contexts. While global brands enjoy considerable success, they simultaneously provoke anti-brand activism, anti-corporatism, and localist resistance movements within an institutional logic of opposition.

Previous research has highlighted market dynamics in which consumers actively engage with conflicting or even mutually exclusive institutional logics. However, limited attention has been given to contexts in which brands organize their practices by navigating plural logics, structuring theories, frames, and narratives to reshape consumption practices. Specifically, little is known about how brands reconfigure consumption experiences by negotiating social interactions without eliminating or fundamentally altering existing elements. This study addresses this gap by investigating how brands develop strategies that integrate multiple institutional logics, fostering non-exclusive and exclusive choices rather than direct competition between global and local brands.

Methodology

The study adopts an interpretive approach grounded in post-structuralist epistemological principles (Thompson, Arnould, and Giesler 2013). The analysis focuses on socially instituted discursive and cultural practices through which meanings are produced, represented, contested, and transformed—ensuring a deeper understanding of the studied context (Moisander, Valtonen, and Hirsto 2009).

Data collection

We employed multiple data collection strategies. First, we conducted an extensive analysis of content from sports newspapers, online portals, blogs, and podcasts, focusing on sports business between March 2016 and February 2020. To enhance our market understanding, we followed sports business journalists on their social networks and examined various consumer communities using netnography (Kozinets, 2019). This process yielded 736 links containing news, research, and opinions, resulting in 2,026 pages of content with a total of 411,911 words. We followed content saturation criteria to ensure theoretical depth and analytical rigor.

Second, we conducted in-depth interviews with industry experts and consumers. We interviewed 21 industry experts (Table 1), generating 1,636 minutes of recorded discussions and producing 582 transcribed pages. The interviews began with an open-ended question (McCracken, 1988) about the participant's entry into the sports industry, followed by discussions on the state of the industry in Brazil. The interviews adopted a post-structuralist approach, emphasizing structures and practices (Fischer, Castilhos, and Fonseca 2014).

Table 1 – Interviewed professionals

	Function	Entity	Date
1	Marketing director	Media group - television	17/03/2016
2	Former marketing director	1st national division club	24/05/2016
3	Sport business journalist	Media group - magazine and internet	03/06/2016

	Function	Entity	Date
4	Sports journalist	Media group - magazine and internet	05/07/2016
5	Business director	Sponsorship management company	09/07/2016
6	Sports business journalist	Media group - magazine and internet	02/09/2016
7	Former marketing director	1st national division club	08/09/2016
8	Latam brand manager	Video game production company	27/10/2016
9	Former marketing director/Stadium manager	1st division Portugal club in Brazil	05/10/2016
10	New business director	1st national division club	19/01/2017
11	Credit superintendent	National banking institution	15/02/2017
12	Former marketing director	1st national division club	15/02/2017
13	Sports journalist	Media group - magazine and internet	10/03/2017
14	Former marketing director	1st national division club	15/03/2017
15	Former director/Candidate for president club	1st national division club	06/03/2018

	Function	Entity	Date
16	CEO	International market research company	08/18/2018
17	Former general sales manager - 2 experiences	Retail and global sports brand	07/05/2019
18	Executive representative of league abroad	National soccer league	13/06/2019
19	Latam director - sports and entertainment	International consulting-audit group	09/10/2019
20	Sport business journalist	Media group - journal and internet	11/10/2019
21	Brand relationship manager	Global sports brand	30/10/2019

To complement the data, we conducted 15 in-depth interviews with consumers, including 12 parents and three parent-child interviews (with children aged between 13-18 years). Participants were deliberately selected to ensure a diverse range of life stories relevant to the study's context. The phenomenological interviews followed a flexible format, beginning with a prompt inviting participants to describe their earliest soccer-related memories or club experiences. This open-ended approach allowed interviewees to articulated the networks of meanings shaping their understanding (Thompson, Locander, and Pollio 1989). These interviews totaled 697 minutes, resulting in 279 transcribed pages.

Data analysis

Data analysis followed an inductive logic in an interactive process, where codes and categories evolved progressively throughout data collection (Miles, Huberman, and Saldaña 2013). The analysis was iterative, moving between the data and theoretical constructs to identify emerging patterns and compare them with existing literature. The process began with initial coding, aimed at identifying patterns and thematic structures, followed by axial coding

to examine the relationships between codes and categories (Miles and Huberman 1994). This led to the development of key themes, synthesizing insights from the data (Spiggle 1994).

At this stage, we integrated insights from club practices and strategies with consumer perceptions, motivations, and understandings. To systematize these findings, we created a visual map illustrating the interplay between different elements of the market. The analysis considered various actors, such as idols, club managers, organizational structures, local and global brands, consumers, families, and friends, as well as activities, including sponsorships, audience engagement, video games, information consumption, entertainment, content creation, club politics, and governance. Additionally, it accounted for objects, such as stadiums and violence, and the consequences of these dynamics, including elitism, engagement, passion, identity formation, financial stability, and sponsorship agreements. This network of meanings facilitated the analytical process and contributed to theory generation (Spiggle 1994).

The study identified two overarching themes: entertainment and belonging. Entertainment encompassed aspects related to the structure of the industry and the management of organizations, while belonging involved issues of access and connection. These themes and their sub-themes, outlined in Table 2, are further explored in the data presentation, where we analyze institutional logics and market dynamics. To ensure reliability, we conducted a cross-analysis among the authors (Miles and Huberman 1994), reaching theoretical consensus on the emerging themes (Spiggle 1994).

Table 2 – Broad themes, sub-themes, and emerging data categories

Themes	**Entertainment**		**Belonging**	
Sub-themes	**Industry structure**	**Club management**	**Access**	**Conection**
Categories	Economic/financial potential	Brand positioning	Effort to access	Relationship with the group
	Know-how	Idols	Interaction	Life stories
	Professionalization	Content quality	Engagement	Meaning

Themes	Entertainment		Belonging	
Sub-themes	Industry structure	Club management	Access	Conection
	Internationalization			Lifestyle

Plural Institutional Logics in the Soccer Industry

We identified two institutional logics—Entertainment and Belonging—which shape the relationship between brands and consumers, influencing their consumption choices. The plurality of norms and beliefs (Cloutier and Langley 2013) within social organization and decision-making (Thornton and Ocasio 1999) shapes market dynamics. The integration of structural, normative, and symbolic aspects drives market adjustments and transformations.

The soccer industry operates within the broader entertainment sector. In a recent interview with Reuters (Keating, 2019), Peter Moore, CEO of Liverpool England Football Club, identified video games as the industry's primary competitors. His speech considers that competition does not occur between the brands of soccer clubs since these are actors that complement each other as offers in the industry. Moore elaborates:

The next generation [of fans] is playing Fortnite [shooting video game] and the question is will they even leave the room? This is the challenge we face. [...] I hate to say it, but it is necessary. We need to go into the rooms to find them. We need to talk to them the way they are used to. [...] My father took me to Anfield [Liverpool stadium] in 1959, I was four years old and my blood has been "Red" ever since. But my son may be the last generation of the Moore family who organically became a Liverpool fan because of me. If the next generation isn't going to do that, we've got to go get them and build platforms that can be relatable, literally talk to them like we're a video game. [...] As CEO of a global soccer club, it's up to me to think of new ways we can continue to involve them, otherwise, we will lose generation after generation. You evolve or you die.

Soccer clubs, European soccer leagues, and American leagues in different sports have reinvented themselves. They are in the process of evolving their structures to face other entertainment possibilities, especially for the new generation of video games and streaming channels, as technological advances can be both a possibility and a threat. An article by The

Economist (2019) discussed the sports and entertainment market, the importance of this market, and how the industry is facing the future:

The technology allows fans to watch any game, anytime, anywhere. This, combined with a growing world population, means that, in terms of sheer numbers, the sporting audience is the largest ever. But revenue growth has slowed, according to consultancy PwC. Attention spans are decreasing. Viewers' "viscosity"—the number of minutes of a game they watch—is decreasing, says Kevin Alavy, director of Futures Sport, another consultancy. A 3% annual decline in the number of minutes watched per game, per sport, and per year is common. [...] This pressure is leading to increasingly intense competition between sports for money and fan attention. The stakes are high. Sport is serious business, generating an estimated $90 billion a year. [...] major sports are still extremely valuable to pay-TV advertisers and providers because almost every other type of entertainment offered on television has suffered dramatic declines and has the worst number in the audience. [...] While Netflix has eroded pay-TV ratings, live sports matches remain irreplaceable—except for other live sports matches.

Within the soccer industry, competition does not happen between different market brands but in a larger entertainment field. Digital platforms both compete with and amplify soccer brands, shaping consumer engagement. They play a fundamental role in the industry's growth and the massification of global content via social networks or video game platforms. One interviewee emphasized the exclusivity of their child's interest in soccer, stating that it was their sole focus and that video games played a central role in their engagement with the sport.

Soccer is just what my son likes! He doesn't care about any other sport or anything else—it's just soccer! And what he does most is play video games—he only has one game. Only FIFA! And then, believe me, he is even more faithful to the videogame title than to Corinthians, because Corinthians is not in this game, I don't know why! [laughs]. He gets mad but doesn't change [laughs]. He still only plays this game, but with Barcelona! (laughs) (C2)

The sports business globally is arguably very significant, even considering the broad panorama of the entertainment industry. In the Brazilian market, the situation is no different, being a relevant industry, with revenues of BRL 52.9 billion in 2018, with clubs, federations, and the Brazilian Confederation representing a total of BRL 11 billion in economic movements

and the production chain of the Brazilian soccer impacting 0.72% of the national GDP (EY 2019). However, an essential point raised in several interviews seems to be that maturity is still far from the local market compared to the global market, as can be seen in the excerpt extracted from the interview.

Talking about soccer as a business in Brazil sounds absurd because that vision does not exist here. We are at a very early stage, so if you talk about the professionalization of clubs, it seems like a scandal—many people nowadays are still against it. It sounds like a joke, but people didn't realize that even when dealing with emotion, with passion, you have to run it like a business, and that belief just doesn't exist here. (P6)

Although Brazilian and European soccer clubs operate within the same institutional logics, their consumption practices, symbols, and narratives differ significantly. Damo (2008) observes, when it comes to the consumption of local preference brands, that the choice of clubs in Brazil is greatly influenced by the first socialization network—family members or close friends—creating a "belonging system in which the flow of emotions and solidarity is intense."

My father-in-law loves soccer! He has only one daughter who has never watched a game with him; now he has my son! He loves the boy. My son arrives there, and the first thing he does is ask my father-in-law how Palmeiras is doing, if he's still good, if he's still in the first place. It's their business; they don't talk about anything else—nothing else matters. (C5)

Consumers differentiate between global and local soccer brands based on distinct criteria, even as they engage with both categories within shared consumption practices.

I like to watch the big clubs... Barça, Real, Bayern... I follow them. I know the players, follow the signings, watch the games, but if the game is at the same time as a Corinthians game, I still prefer Corinthians. I think my friends too, I have many friends who support Corinthians, São Paulo, Palmeiras... We suffered together! Some people say they support Real or Barça, but I don't know. Most guys enjoy watching them play, preferably against another big club. The match is very good, much better. But the real thing is that people don't cheer for these clubs; they like it. It is different. It's more preferring one team than the other, not cheering against it, as happens here. It is the same case as Cristiano Ronaldo and Messi. Even those who prefer one don't cheer against the other! It is different. (C4)

Interview data frequently highlighted emotions such as 'family relationship,' 'love,' and 'passion' in the process of choosing a local club. The feeling of belonging—being part of

the rites and traditions with their closest social group—is noticeable. In a survey on the Brazilian soccer consumption market, 28.4% of the interviewed said they choose the same club their family supports; while 23.6% chose the same club their parents support (SPC Brasil 2016). The selection of a favorite club appears to be deeply rooted in social belonging and emotional attachment. To some extent, supporting the same club as family and friends reinforce the social ties in which the flow of emotions and solidarity is intense; so that the "eternal bond with the club" becomes understandable (Damo 2008). Loyalty to the club is another factor that showed high levels in the same survey, as 93.2% said that no matter what happens, they will always be loyal to the "heart club," while 63.8% stated that the club is part of their life and they feel fulfilled with the club's achievements (SPC Brasil 2016). The consumption process of global brands primarily follows a decision process distinct from local brands. Although they do not disregard the relationship process and seek to establish relationships with global consumers, whether through idols, their social networks in the most diverse languages, or even by video game platforms.

C7: I like Cristiano Ronaldo a lot, so I support Real Madrid.

Question: And now that he plays for Juventus?

C7: Now I support Juventus too. And I keep rooting for Real!

Question: Got it. And Messi, do you think he is also a good player?

C7: A lot! He is second-best!

Question: Do you watch his games?

C7: Yes, I watch it every time it's on.

Question: Do you support Barcelona too?

C7: Yeah... I think I cheer for them too!

European clubs are starting to arrive in broadcasts and video games, in which children spend much more time. On PS4, the boys don't play with Corinthians, but with Barcelona, because they want to control Messi and Soares. […] Why would they prefer a Corinthians shirt with the name of a guy who will move to China next year, instead of wearing Messi's shirt? Europeans began to compete for attention, money, and time. Everyone is competing for the same child. The truth is that it would be difficult for Brazilian clubs with this scenario, even if they did everything right. Doing it all wrong then? (P3)

The logic that justifies the consumption of these brands is not based on feelings such

as passion or belonging, and these are not the attributes highlighted as characteristic of the relationship and connection with the brands—it is the generation of content and entertainment that brings the greatest impact.

I think it's important for Brazilian clubs to understand. They are losing revenue to European clubs, not other Brazilian opponents. Yesterday, PSG and Barcelona played, and everyone watched that game. It was broadcast in the middle of the day, on open TV, with a large audience. Sure enough, all the kids watched. Today we have a match between São Paulo and Santos for the 1st. Paulistão phase at 10 pm. Will the kids watch? Of course not! (P11)

Involvement without belonging ends up differentiating the processes. For local brands, one of the brands is usually consumed. For global brands, the group is commonly consumed, not a specific brand, which mischaracterizes the dualism highlighted by Damo (2006) and present in the dynamics of local brands, as a feeling that feeds rivalries, a fundamental aspect of competitive sports, not seeming predominant when refers to European clubs in the Brazilian market. Soccer is a game, but more than that, it is global entertainment (Giulianotti 2012), and consumer participation is essential. Spectators at a sporting event are part of the entertainment, as they are responsible for generating the atmosphere, definitely contributing to the spectacle (Andrews and Ritzer 2018). The evolution of the business is unmistakable, bringing new parameters around the world, with the substantial valuation of the brands of clubs, tournaments, players, and broadcast contracts, in addition to transnational media coverage of a more deregulated transfer market deepening the economic distance between the rich Europeans and the rest of the clubs (Numerato and Giulianotti 2018).

Aspects such as the quality of the game, the beauty of the spectacle, organization, and fun are attributes very present in the data when it comes to soccer, much with local brands, but primarily about global brands, as a comparison effect. Unequivocally, professionals and consumers compare realities found in the European market and the national market, and currently, the comparisons present a significant discrepancy in favor of European global brands, considered the models to be followed and with enormous access to the national market.

You watch the Champions League and you have that perfect image, and it's the access you didn't have before. You get the feeling that it really works, as a framework. And there is

the media cannon, which gave birth to everything we see today, because, if maybe we didn't have it on open TV, putting it for everyone, maybe it would take longer to achieve the success it has today here in Brazil. (P1)

Then I heard someone saying that there are a lot of kids wearing European team jerseys. Of course! It has become a fashion piece! My son has several shirts, one from each club, in different colors. If you must know, I don't think he really cares about the clubs he's wearing, he just thinks the shirt is cool. He doesn't wear normal clothes anymore, only soccer shirts! (C1)

Our analysis reveals that while consumers engage in similar consumption practices for local and global soccer brands, the underlying theories, frameworks, and narratives differ, shaping distinct symbolic meanings. In fact, for brands that represent soccer clubs, the shirts sold are similar, the matches on television or streaming, video game franchises, virtually all of them similarly interact on social networks. However, the analysis identified different logics that guide the creation of meaning, ideas, and mobilization for decision-making that defines consumption in this market in Brazil. Table 3 describes the two main field-level logics presented in the Brazilian soccer market, the "Fun" and "Roots."

Table 3 – Soccer market in Brazil: logic and characteristics

	Fun	**Roots**
Objective	Entertainment	Belonging
Provider identity	Brands (clubs and players)	Social group
Authority	Market knowledge	Tradition
Source of authority	Journalists and Digital Influencers	Family Members and Friends
Consumer identity	Cool, up-to-date, trendy	Passionate
Type of practice	Consumption	Rituals

Source: Research data. Based on the framework proposed by Ertimur and Coskuner-Balli (2015).

Discussion

This study contributes to market systems research by illustrating how brands do not face conflicts or substitutions between institutional logics. Instead, plural logics complement each other in shaping consumer decisions. Unlike previous research emphasizing tensions between coexisting logics (Humphreys 2010; Lee and Lounsbury 2015), our findings suggest that consumers and brands integrate multiple logics simultaneously. Rather than a binary dynamic of conflict or replacement, we introduce the concept of negotiated complementarity, where local and global brands strategically engage with both entertainment-driven and identity-based logics to enhance legitimacy and consumer engagement. Global brands do not aim to replace local brands but rather seek assimilation within established institutional logics, reinforcing entertainment narratives while preserving local brand dynamics. As a result, the Brazilian soccer market accommodates global brands without fostering consumer resistance, anti-corporate activism, or localist movements.

Soccer is a key component of modern global consumer culture, featuring iconic brands from both sociocultural and market perspectives (McDonagh 2017). Giulianotti and Robertson (2004) argue that the soccer industry should not merely be viewed as a reflection of globalization but rather as a manifestation of it. Any analysis of the soccer market must therefore consider the interplay between global and local forces, where globalization unfolds through two interconnected processes: the compression of the world—marked by intensified social and cultural connectivity—and growing awareness of the world as a unified place (Robertson 1992; 1995).

In recent decades, the global presence of European soccer clubs has reshaped diverse markets, transcending national borders. These clubs have evolved into multinational corporations, building strong brand equity that generates immense financial returns through the consumption of televised matches, social media content, merchandise, and other branded products. This success is further bolstered by recruiting top-tier players and coaches, ensuring competitive excellence and sustained global exposure. These strategies align with the institutional logic of “fun,” positioning global clubs as entertainment brands extending beyond the sport itself to become global consumer icons. In contrast, local brands attempt to mirror these strategies but struggle due to structural market challenges and brand management limitations.

Despite the dominance of global brands, local brands remain legitimate and relevant to consumers in the Brazilian market. However, local soccer clubs—often politically driven associations with governance challenges—face difficulties maintaining competitive advantages. This impacts the player transfer market, influencing the quality of the local game and, consequently, its entertainment appeal. Advances in technology further amplify these disparities by providing instant global access to soccer-related content, enabling players to build personal brands that reinforce the competitive gap between local and global brands.

To better understand this system, this research employed institutional theory, using institutional logics as analytical lenses. Markets are understood as organizational fields shaped by institutions with culturally and symbolic recognized meanings that define social reality (Ertimur and Coskuner-Balli 2015; Scaraboto and Fischer 2013). The institutional logics (Thornton and Ocasio 1999) identified in this study explain how brands operate in this market. The findings reveal that consumers simultaneously draw upon multiple institutional logics, not only the "fun" logic of entertainment but also the "roots" logic, which prioritize belonging and tradition.

The institutional logic of "fun" emphasizes entertainment value, where media outlets and influencers act as arbiters of desirability, shaping consumer perceptions of what is trendy. In this context, soccer brands function as entertainment products, offering novelty and excitement. Conversely, the institutional logic of "roots" underscores community and identity, where authority is derived from families, local traditions, and shared rituals. This dual engagement challenges the notion that consumers choose either global or local brands based on a strict segmentation. Instead, they seamlessly navigate between both, incorporating elements of entertainment and cultural heritage into their consumption repertoire.

Unlike prior studies suggesting that institutional logics inherently generate conflicts that brands must resolve (Ertimur and Coskuner-Balli 2015), our findings demonstrate that brands in the soccer market do not adopt divergent strategies to gain legitimacy. Instead, both logics coexist and shape consumption practices simultaneously. Global brands primarily align with the "fun" logic but incorporate "roots" elements to foster consumer identification—whether through local-language communication, international player representation, or culturally embedded marketing campaigns. Conversely, local brands, deeply rooted in the "roots" logic, increasingly integrate entertainment-oriented strategies

to appeal to consumers who also engage with the "fun" logic. This interplay suggests that consumer engagement with brands is not an either/or decision but a dynamic negotiation between entertainment and cultural identity.

Brazilian soccer clubs transcend mere branding—they function as cultural institutions (DaMatta 2009), linking past, present, and future. Supporting a club constructs social identity (Toledo 2010) and fosters community (Damo 2006; 2008). However, soccer clubs are also commodified brands (Giulianotti and Robertson 2004), embedded in the global entertainment industry and shaped by increasing media influence (Hepp et al. 2015). Consumers define their engagement with local brands through a combination of institutional logics, selecting brands that reinforce personal narratives, memories, and rituals. While local clubs benefit from deeply ingrained cultural ties, their market sustainability depends on integrating entertainment elements to remain competitive. If consumers disengage from local soccer brands, they may shift toward alternative entertainment options rather than exclusively to global soccer brands.

This study contributes to market systems research by demonstrating that institutional logics in the soccer market do not operate as mutually exclusive forces but rather as complementary influences on brand legitimacy and consumer behavior. While previous research has focused on logics as sites of tension (Humphreys 2010; Lee and Lounsbury 2015), we show that consumers and brands simultaneously negotiate multiple logics without resolving them into a singular dominant logic.

Thompson and Arsel (2004) examined global-local brand interactions through Starbucks' hegemonic influence, showing how global brands reshape local markets. In contrast, our findings suggest that global brands in the soccer market do not impose a substitutive model but rather engage in assimilative strategies, reinforcing entertainment narratives while preserving local brand legitimacy. As a result, the Brazilian soccer market accommodates global brands without provoking widespread consumer resistance, anti-corporate activism, or localist movements.

While this research offers valuable insights, it has limitations that open avenues for further exploration. We did not examine how different consumer profiles—such as highly engaged fans or members of organized supporter clubs—experience these institutional logics. Future research should investigate variations across age groups, socioeconomic backgrounds,

and geographical locations. Additionally, further studies could explore how individual player branding influences institutional logics and consumer-brand relationships.

Another promising avenue for research is examining how complementary institutional logics operate in industries beyond soccer, particularly in fields where brand identity is less pronounced, such as entertainment services, healthcare, or plastic surgery. Future studies could also explore how brands grounded in "rooted" institutional logics perform in different institutional fields and how these logics shape long-term business outcomes.

References

Andrews, David L., and George Ritzer (2018), "Sport and prosumption," *Journal of Consumer Culture*, 18(2), 356-73.

Cloutier, Charlotte, and Ann Langley (2013), "The logic of institutional logics: Insights from French pragmatist sociology," *Journal of Management Inquiry*, 22(4), 360-80.

DaMatta, Roberto (2009) "Sport in society: An essay on Brazilian soccer," *VIBRANT-Virtual Brazilian Anthropology*, 6(2), 98-120.

Damo, Arlei S. (2006), "A magia da seleção," *Revista Brasileira de Ciências do Esporte*, 28(1), 73-90.

Damo, Arlei S. (2008), "Dom, amor e dinheiro no futebol de espetáculo," *Revista Brasileira de Ciências Sociais*, 23(66), 139-50.

DiMaggio, Paul J., and Walter W. Powell (1983), "The iron cage revisited: Institutional isomorphism and collective rationality in organizational fields," *American Sociological Review*, 48(2), 147-60.

Ertimur, Burçak, and Gokcen Coskuner-Balli (2015), "Navigating the institutional logics of markets: Implications for strategic brand management," *Journal of Marketing*,79(2), 40-61.

EY. (2019). *Impacto do Futebol Brasileiro.* Available at: < https://conteudo.cbf.com.br/cdn/201912/20191213172843_346.pdf>. Consulted on 12/26/2019.

Fischer, Eileen, Rodrigo B. Castilhos, and Marcelo Jacques Fonseca (2014), "Entrevista qualitativa na pesquisa de Marketing e do consumidor: Abordagens paradigmáticas e orientações," *REMark-Revista Brasileira de Marketing*, *13*(4), 67-79.

Friedland, Roger, and Robert R. Alford (1991), "Bringing society back in: Symbols, practices and institutional contradictions," In: Powell WW, DiMaggio PJ, eds. *The new institutionalism in organizational analysis* (Vol. 17), 232-263. Chicago, IL: University of Chicago Press.

Giesler, Markus, and Eileen Fischer, (2017), "Market system dynamics," *Marketing Theory* 17(1), 3-8.

Giulianotti, Richard (2012), "Soccer," *The Wiley-Blackwell Encyclopedia of Globalization*.

Giulianotti, Richard (2015), *Sport: A critical sociology*. John Wiley & Sons, UK.

Giulianotti, Richard, and Roland Robertson (2004), "The globalization of soccer: a study in the glocalization of the 'serious life"', *The British journal of sociology*, 55(4), 545-68.

Giulianotti, Richard, and Roland Robertson (2012), "Mapping the global soccer field: a sociological model of transnational forces within the world game," *The British journal of sociology*, 63(2), 216-40.

Hepp, Andreas, Stig Hjarvard, and Knut Lundby (2015), "Mediatization: theorizing the interplay between media, culture and society," *Media, culture & society*, 37(2), 314-24.

Humphreys, Ashlee (2010), "Semiotic structure and the legitimation of consumption practices: The case of casino gambling," *Journal of Consumer Research*, 37(3), 490-510.

Jepperson, Ronald L. (1991), "Institutions, Institutional Effects, and Institutionalism,". Powell WW, DiMaggio PJ, eds. *The new institutionalism in organizational analysis* (Vol. 17). Chicago, IL: University of Chicago Press.

Keating, S. (2019). *Liverpool CEO battles to turn Fortnite fans to soccer.* Available at: < https://uk.reuters.com/article/uk-soccer-liverpool-moore/liverpool-ceo-battles-to-turn-fortnite-fans-to-soccer-idUKKCN1QX00J>. Consulted on 12/18/2019.

Kozinets, Robert V. (2010), *Netnography: Doing ethnographic research online*. Sage publications. UK.

Kozinets, Robert. V. (2019), *Netnography: The essential guide to qualitative social media research.* Sage publications, UK.

Lee, Min-Dong Paul, and Michael Lounsbury (2015), "Filtering institutional logics: Community logic variation and differential responses to the institutional complexity of toxic waste," *Organization Science*, 26(3), 847-66.

Martin, Diane M., and John W. Schouten (2014), "Consumption-driven market emergence,"*Journal of Consumer Research*, 40(5), 855-70.

McCracken, Grant (1988). *The long interview*. Sage Publications.

McDonagh, Pierre (2017), "Soccer–marketplace icon?," *Consumption Markets & Culture*, 20(1), 7-11.

Meyer, John W. and Brian Rowan (1977), "Institutionalized organizations: Formal structure as myth and ceremony," *American Journal of Sociology*, 83(2), 340-63.

Miles, Matthew B. and Michael A. Huberman (1994), *Qualitative data analysis: An expanded sourcebook*. Sage Publications.

Miles, Matthew B. Michael A. Huberman, and Johnny Saldaña (2013), *Qualitative data analysis: A methods sourcebook.* SAGE Publications. 3rd.

Moisander, Johanna, Anu Valtonen, and Heidi Hirsto (2009), "Personal Interviews in Cultural Consumer Research–poststructuralist challenges," *Consumption Markets & Culture*, 12(4), 37–41.

Numerato, Dino, and Richard Giulianotti (2018), "Citizen, consumer, citimer: The interplay of market and political identities within contemporary soccer fan cultures," *Journal of Consumer Culture*, 18(2), 336-55.

Powell, Walter W., and Paul J. DiMaggio, eds. (1991), *The new institutionalism in organizational analysis*. University of Chicago Press.

Robertson, Roland (1992), *Globalization: Social theory and global culture*. Sage.

Robertson, Roland (1995), Glocalization: time-space and homogeneity-heterogeneity. in Featherstone, Mike, Lash Scott, and Roland Robertson (eds.), *Global Modernities,* Sage, UK.

Scaraboto, Daiane, and Eileen Fischer (2013), "Frustrated fatshionistas: An institutional theory perspective on consumer quests for greater choice in mainstream markets," *Journal of Consumer Research*, 39(6), 1234-57.

Scott, Richard W. (2008), *Institutions and organizations: Ideas, interests, and identities*. Sage publications.

Scott, Richard W. and John W. Meyer, (1991), "The Organization of Societal Sectors: Propositions and Early Evidence," in Powell, Walter W., and Paul J. DiMaggio, eds. *The new institutionalism in organizational analysis.* University of Chicago Press.

SPC Brasil. (2016). Mercado de Consumo do Futebol Brasileiro. Available at <www.spcbrasil.org.br › 2016/09 › Analise_Consumo_Futebol-1>. Consulted on 10/05/2016.

Spiggle, Susan (1994), "Analysis and interpretation of qualitative data in consumer research," *Journal of consumer research*, 21(3), 491-503.

Suchman, Mark C. (1995), "Managing Legitimacy: Strategic and Institutional Approaches", *Academy of Management Review,* 20(3)*,* 571–611.

The Economist. (2019). Competition between sports for fans' money and attention is increasingly fierce. Available at: < https://www.economist.com/international/2019/10/05/competition-between-sports-for-fans-money-and-attention-is-increasingly-fierce>. Consulted on 12/18/2019.

Thompson, Craig J., Eric Arnould, and Markus Giesler (2013), "Discursivity, difference, and disruption: Genealogical reflections on the consumer culture theory heteroglossia," *Marketing Theory,* 13(2), 1–27.

Thompson, Craig J., and Zeynep Arsel (2004), "The Starbucks brandscape and consumers' (anticorporate) experiences of glocalization," *Journal of consumer research*, 31(3), 631-42.

Thompson, Craig J., William B. Locander, and Howard R. Pollio (1989), "Putting consumer experience back into consumer research: The philosophy and method of existential-phenomenology," *Journal of consumer research*, 16(2), 133-46.

Thornton, Patricia H., and William Ocasio (1999), "Institutional logics and the historical contingency of power in organizations: Executive succession in the higher education publishing industry, 1958–1990," *American Journal of Sociology*, 105(3), 801-43.

Thornton, Patricia H., and William Ocasio (2008), "Institutional logics," *The Sage handbook of organizational institutionalism*, 99-128.

Thornton, Patricia H., William Ocasio, and Michael Lounsbury (2012), *The institutional logics perspective: A new approach to culture, structure, and process*. Oxford University Press.

Toledo, Luiz Henrique de (2010), "Torcer: a metafísica do homem comum," *Revista de História*, 163, 175-89.

Walsh, Adrian J., and Richard Giulianotti (2001), "This sporting mammon: A normative critique of the commodification of sport," *Journal of the Philosophy of Sport*, 28(1), 53-77.

Bridging the Gap: Addressing Women's Health and the Role of *FemTech*

Kim Brunel

Frédéric Jallat

"My demand as a woman is that my difference be acknowledged,

and that I not be forced to adapt to the male model."

Simone Veil

Abstract

Recent advances in addressing women's health have facilitated the rise of *FemTech* (a contraction of Female Technology), positioning it as one of the most promising fields in healthcare this decade. Despite its undeniable potential, *FemTech* continues to face significant challenges, particularly in data accessibility and information availability—issues that reflect historical discrimination, societal representations, and political priorities concerning women's health. As a field situated at the intersection of science, innovation, and societal evolution, *FemTech*, like any area within the life sciences, requires comprehensive, updated, and reliable data to foster optimal innovation. Recent advancements in health technologies have opened unprecedented opportunities in diagnosing, monitoring, and treating female patients.

Keywords: *FemTech*, women's health, access to innovation, data, artificial intelligence

Introduction

The National Academy on Women's Health Medical Education defines women's health as an approach encompassing the screening, diagnosis, and treatment of conditions that are specific to women, more frequent or severe in women, and/or manifest differently between genders.[1]

Recent progress in understanding women's specific health needs, examining mixed-gender pathologies through a female lens, and breaking down taboos has transformed how society approaches women's health. According to a McKinsey study from January 2024, improving women's health could not only enhance the well-being of millions of women but also boost the global economy by at least $1 trillion annually by 2040.[2]

In this context, *FemTech*—emerging at the crossroads of new technologies, entrepreneurial dynamism, and societal shifts in women's health—has experienced significant growth.

Projections from Statista (August 2022) suggest that the digital health market will grow by over 60% between 2021 and 2025, reaching a global value of €78 billion, with nearly 10% of this market dedicated to women's health.[3]

Artificial intelligence (AI) in healthcare is playing a transformative role, offering increasingly advanced therapeutic solutions that require extensive and reliable data to be effective. A joint report by McKinsey and EIT Health highlights AI's potential to revolutionize healthcare by improving outcomes, patient pathways, and workforce efficiency: faster patient care, reduced administrative burden, more reliable and early detection, and broader access to quality care.[4]

Reflecting the enthusiasm for this field, as well as the complexity and growth of available data, *FemTech* startups focused on digital health solutions saw a 105% increase in global funding in 2020.[5]

Innovative machine learning approaches are being funded to classify cohorts based on women's health phenotypes.[6] Studies demonstrate promising automated approaches, including Davidson and Boland's exploration of improving outcomes in high-risk pregnancies[7] and Chia-Yu Su et al.'s work on predicting gestational diabetes and pre-eclampsia.[8]

A prerequisite for success in these ventures is access to sophisticated, reliable, and accessible databases, critical for advancing entrepreneurship and leveraging these innovative approaches in women's health.

Original Sin: Historical, Psychological, and Social Factors Hindering Women's Health

Even today, a historical layering of three intersecting challenges—cognitive biases, mental load, and economic precariousness—complicates the consideration of women's specific health needs and the development of essential databases for dedicated treatments.

1. Cognitive Biases

Cognitive biases, particularly implicit ones, represent the most significant obstacle to informed analysis and better consideration of women's health. Implicit biases are automatic,

unconscious prejudices that can manifest in behavior. They often emerge in healthcare when making quick decisions or diagnoses to simplify complex environments.[14],[15]

For instance, studies reveal gender-based disparities in diagnoses. Women presenting with symptoms similar to men's for coronary diseases are twice as likely to be misdiagnosed with a mental illness.[16]

AI has also inherited these biases: algorithms are frequently designed without considering gender-specific health differences. Consequently, data scientists inadvertently create suboptimal models and outcomes.[17]

2. Mental Load

The mental load disproportionately affects women, encompassing the invisible work of managing and organizing daily tasks and emergencies. Sociologist Monique Haicault describes it as the cognitive burden of simultaneously managing familial and professional spaces.[10]

According to an Ipsos survey, 63% of women report being affected by a detrimental mental load, compared to only 36% of men.[11] This impacts women's overall health, as evidenced by an AXA study showing that only 38% of French women undergo regular health checkups.[12]

3. Economic Precariousness

Economic precarity exacerbates disparities in women's access to healthcare. Women constitute over half of the impoverished population in Europe and 70% of low-wage workers. They are disproportionately represented among single-parent households, which are often financially unstable.[13]

For example, access to contraception varies significantly by socioeconomic status: 6.5% of female laborers forego contraception compared to only 1.6% of female executives.

Data Scarcity in Women's Health

Health data plays a crucial role in improving population well-being. In the digital health era, data is central to therapeutic efficacy and economic models in the life sciences.

Despite its critical importance, data on women's health remains insufficient at all stages—diagnosis, monitoring, epidemiology, and biotech applications—hindering both healthcare and innovation.[19]

Startups in the field often have to generate their own data, significantly increasing R&D costs and delaying patient access to innovation.

McKinsey's recent study highlights five major recommendations:[19]

- Acknowledge gender's role in disease definition and treatment.

- Incentivize data collection, anonymization, and sharing throughout the data value chain.

- Improve production and use of gender-specific data in healthcare systems.

- Fund new projects dedicated to women's health data.

- Rethink epidemiological metrics to emphasize gender disparities.

Positive Developments: Inclusion of Women in Clinical Trials

Historically, women were excluded from clinical trials until the late 20th century due to hormonal fluctuations and potential pregnancy risks.[21]

It wasn't until 1993 in the U.S. and 1997 in France that women's inclusion in clinical trials became mandatory.[22] However, their representation in certain areas, like HIV studies, remains limited (11% as of 2016).[23]

Conclusion

This exploratory research lays the groundwork for understanding the socio-political dynamics and data access challenges tied to women's health. While obstacles persist, favorable factors—including heightened awareness, growing impact investment, and increased female representation in decision-making—signal a promising future for *FemTech*.

References

Beery, A. K., and Zucker, I. (2011). Sex bias in neuroscience and biomedical research. *Neuroscience & Biobehavioral Reviews*, *35*(3), 565-572. https://doi.org/10.1016/j.neubiorev.2010.07.002

Ces médicaments qui excluent les femmes. (s. d.). Consulté 19 juillet 2023, à l'adresse https://www.novethic.fr/actualite/social/discrimination/isr-rse/ces-medicaments-qui-excluent-les-femmes-144540.html

Cirillo, D., Catuara-Solarz, S., Morey, C., Guney, E., Subirats, L., Mellino, S., Gigante, A., Valencia, A., Rementeria, M. J., Chadha, A. S., and Mavridis, N. (2020). Sex and gender differences and biases in artificial intelligence for biomedicine and healthcare. *Npj Digital Medicine*, *3*(1), Article 1. https://doi.org/10.1038/s41746-020-0288-5

Closing data gaps in gender. (s. d.). Consulté 29 mai 2023, à l'adresse https://www.who.int/activities/closing-data-gaps-in-gender

Closing the gender data gap in healthcare | McKinsey. (s. d.). Consulté 29 mai 2023, à l'adresse https://www.mckinsey.com/industries/life-sciences/our-insights/closing-the-data-gaps-in-womens-health.

Closing the women's health gap | McKinsey. (s. d.). Consulté 13 avril 2024, à l'adresse https://www.mckinsey.com/mhi/our-insights/closing-the-womens-health-gap-a-1-trillion-dollar-opportunity-to-improve-lives-and-economies

Davidson, L., and Boland, M. R. (2021). Towards deep phenotyping pregnancy : A systematic review on artificial intelligence and machine learning methods to improve pregnancy outcomes. *Briefings in Bioinformatics*, *22*(5), bbaa369. https://doi.org/10.1093/bib/bbaa369

Définition : Biais implicite. (2019, octobre 16). Psychomédia. http://www.psychomedia.qc.ca/lexique/definition/biais-implicite

#18 Tips des Femmes de Santé : Comment appréhender des biais implicites en santé ? Par Anne Rocher et Françoise Jaulin. (2022, novembre 14). https://open.spotify.com/episode/0allDztYFQnFMjTHtypVE4

Can AI confront inappropriate behavior?

Gabriela Rauber

Lucia Barros

Julia Schuckmann

Ana Valenzuela

Abstract

As human-machine interactions grow, we explore AI's role in confronting inappropriate behaviors. Three experiments reveal that AI-delivered feedback is considered less morally grounded than human feedback, affecting moral agency perceptions. Observers react less to feedback sources than perpetrators, particularly with AI. This study underscores AI's changing function in social evaluations.

Extended Abstract

Integrating artificial intelligence (AI) into daily interactions has highlighted the importance of understanding user perceptions. Consumers often prefer AI for its efficiency and lack of judgment (Giroux et al., 2022), but this changes when AI evaluates human behavior, particularly in moral contexts (Pauketat & Anthis, 2022). Questions arise about AI's legitimacy and competence regarding moral agency (Banks et al., 2019). Users attribute less intention to AI, holding companies responsible during service failures (Pavone et al., 2023). They generally see AI as having lower moral agency, resulting in more negative interactions with AI compared to humans and more frustration during AI failures (Shank & DeSanti, 2018; Giroux et al., 2022; Kim et al., 2023; Pavone et al., 2023).

Most existing studies focus on AI as a reactive tool, while less is known about consumer reactions to AI taking a proactive role in confronting inappropriate behavior. We aim to explore how users respond to AI agents in morally charged situations. Confronting users about their behavior presents a challenge, as AI's lack of emotional capacity may lead to perceived illegitimacy or resistance from users (Hartmann et al., 2023). If AI is viewed as a mere tool, its attempts to address inappropriate behavior may not be well accepted. Based on this, we propose:

H1. Confrontation provided by human agents is perceived as more appropriate than confrontation provided by AI agents.

H2. Perceived moral agency mediates the relationship between the type of agent (human vs. AI) and evaluations of confrontation appropriateness.

H3. Participants' roles (observer vs. perpetrator) influence the evaluation of confrontation, with perpetrators being more sensitive to the type of agent (human vs. AI) than observers.

We conducted three experimental studies to test our hypotheses. In Study 1, 76 participants (M_{age} = 21.34, *SD* = 3.57; 54.8% female) were randomly assigned to one of two conditions (chatbot vs. human). Firstly, they rated their agreement level in eleven sentences that evaluated whether a chatbot (vs. a human) has the right to get offended and set the moral ground (α = .91). Then, they completed a perceived moral agency scale (Banks, 2019). Finally, they were asked to write an open answer explaining how a chatbot (vs. human) should reply to an uncivil comment.

In summary, participants believe that chatbots have less right to get offended or to confront offensive customers than humans ($M_{chatbots}$=3.37, *SD*=1.17; M_{humans}=4.68, *SD*=1.07; *p*<.001; *d*=1.17). They also perceive chatbots as having less moral agency than humans ($M_{chatbots}$ =3.78, *SD*=1.22; M_{humans}=4.93, *SD*=.82; *p* <.001; *d*=1.09). Finally, participants' open answers expressed fewer feelings and opinions when the agent was a chatbot (25%) than a human (47.4%); χ^2 = .05. Study 1 shows that individuals perceive chatbots as having less right to confront rude customers and having less moral agency than humans.

In Study 2, 343 participants (M_{age}=44.20, *SD*=14.34; 48.7 female) read a scenario where they lost their patience after a service failure and cursed a chatbot (human online assistant). The chatbot (human) replied, either confronting them or not. After reading the scenario, participants were asked to write an open-ended response expressing their opinion about the response. They also answered the same perceived moral agency scale from Study 1.

Three research assistants blind to the experimental conditions rated the texts as appropriate, neutral, or inappropriate. In the control conditions, there was no difference in the proportion of appropriate answers between chatbots and humans (χ^2 = .36). In the confrontation condition, more participants found that the reply given by a human (75.4%) was appropriate than by a chatbot (49.0%; χ^2 = .002).

We conducted a moderated mediation analysis (Hayes 2017, model 7). The analysis included confrontation as the independent variable (1 = confronting, 0 = control), agency as the moderator (1=chatbot, 0=human), moral agency as the mediator, and appropriateness as the dependent variable. The indirect effect of confrontation on appropriateness through moral agency was significant for the chatbot (b = -.25; 95% *CI*: -.46, -.08) but not for the human (b = -.02; 95% *CI*: -.13, .09). Study 2 shows that individuals perceive that chatbots' responses to confronting rude customers are less appropriate than humans' because of a reduced moral agency.

In Study 3, 229 participants (*Mage*=8.76, *SD*=6.663, 43.2% female) were presented with scenarios of negative feedback on non-work-related website use during work hours. Participants were randomly assigned to one of four conditions: receiving feedback directly from an AI system (AI-Perpetrator), observing feedback given by an AI to a colleague (AI-Observer), receiving feedback directly from a human resource assistant (Human-Perpetrator), or observing feedback given by a human resource assistant to a colleague (Human-Observer).

A factorial ANOVA revealed a significant effect of feedback source ($F(1, 225)=5.600$, $p=0.019$) with human feedback (M=4.40) rated more appropriate than AI feedback (M=4.04). No significant effect was found for participant role ($F(1, 225)=0.080$, $p=0.778$). Further analysis showed that perpetrators rated human feedback (M=4.44, SE=0.15, 95% CI [4.14, 4.74]) as significantly more appropriate than AI feedback (M=3.95, SE=0.15, 95% CI [3.66, 4.25], $p=0.025$), while observers rated both human (M=4.36, SE=0.15, 95% CI [4.06, 4.66]) and AI feedback (M=4.12, SE=0.15, 95% CI [3.82, 4.42]) similarly (SE=0.22, $p=0.28$).

A moderated mediation analysis (Hayes 2017, model 14) indicated that moral agency mediated the relationship between feedback source and appropriateness perceptions, particularly for perpetrators (Effect=-0.3348, 95% CI[-0.5489, -0.1482]) but not for observers. Overall, the study suggests that human feedback is perceived as more appropriate than AI feedback, especially by perpetrators.

Study 1 found that participants assign less moral agency and rights to chatbots than to humans, reflecting societal skepticism about AI's moral authority. Study 2 showed that chatbots' confrontational responses are seen as less appropriate due to their perceived lack of moral agency. Study 3 suggested that participants' direct involvement influences how they evaluate feedback from AI.

Prior research has shown that higher perceived moral agency enhances trust, likeability, and user engagement. For example, studies by Banks (2019) and Wester et al. (2024) demonstrate that social machines perceived as having greater moral capacities are trusted more and lead to more meaningful interactions. However, our findings indicate that users perceive AI as having lower moral agency compared to humans, presenting a significant challenge in marketing scenarios where AI frequently interacts with consumers. This perception gap suggests a potential trust deficit that could adversely affect user acceptance and the effectiveness of AI-driven services.

To address this challenge, marketing strategies should enhance transparency regarding how AI decisions are made. Clearly communicating the ethical guidelines that govern AI behavior and showcasing instances of ethical AI conduct can elevate users' perceptions of AI's moral agency. Additionally, incorporating user feedback mechanisms can demonstrate an ongoing commitment to ethical practices.

Future research should investigate the impact of diverse communication strategies on user perceptions of AI's moral agency. Research by Shumanov and Johnson (2021) demonstrates that personalizing chatbot personalities to align with user characteristics enhances satisfaction and engagement, possibly due to an increased perceived moral agency. This alignment may be further enhanced by adopting specific moral communication styles that render AI's ethical reasoning more transparent and relatable to users, such as employing more accessible language. Finally, understanding varied responses to AI's moral decisions can help tailor interactions to meet the expectations of distinct consumer segments. In fields like financial advising and healthcare, it is crucial that AI reflects diverse moral viewpoints to avoid backlash and promote inclusive technology adoption.

References

Banks, J. (2019). A perceived moral agency scale: Development and validation of a metric for humans and social machines. *Computers in Human Behavior,* 90, 363-371.

Brożek, B., & Janik, B. (2019). Can artificial intelligences be moral agents?. *New ideas in psychology*, *54*, 101-106.

Giroux, M., Kim, J., Lee, J. C., & Park, J. (2022). Artificial intelligence and declined guilt: Retailing morality comparison between human and AI. *Journal of Business Ethics,* 178(4),

1027-1041.

Hartmann, J., Bergner, A., & Hildebrand, C. (2023). MindMiner: Uncovering linguistic markers of mind perception as a new lens to understand consumer–smart object relationships. *Journal of Consumer Psychology*, *33*(4), 645-667.

Hayes, A. F. (2017). *Introduction to mediation, moderation, and conditional process analysis: A regression-based approach.* Guilford publications.

Kim, T., Lee, H., Kim, M. Y., Kim, S., & Duhachek, A. (2023). AI increases unethical consumer behavior due to reduced anticipatory guilt. *Journal of the Academy of Marketing Science,* 51(4), 785-801.

Kutlaca, M., Becker, J., & Radke, H. (2020). A hero for the outgroup, a black sheep for the ingroup: Societal perceptions of those who confront discrimination. *Journal of Experimental Social Psychology*, 88, 103832.

LaMothe, E., & Bobek, D. (2020). Are individuals more willing to lie to a computer or a human? Evidence from a tax compliance setting. *Journal of Business Ethics*, *167*(2), 157-180.

Liu, Y., Wang, X., Du, Y., & Wang, S. (2023). Service robots vs. human staff: The effect of service agents and service exclusion on unethical consumer behavior. *Journal of Hospitality and Tourism Management,* 55, 401-415.

Maltseva, K., & Van Gils, S. (2022). Calling Siri a grumpy f* cker: the study of incivility towards ai versus. human service agents. In *Academy of Management Proceedings* (Vol. 2022, No. 1, p. 11398). Briarcliff Manor, NY 10510: Academy of Management.

Pauketat, J. V., & Anthis, J. R. (2022). Predicting the moral consideration of artificial intelligences. *Computers in Human Behavior*, *136*, 107372.

Pavone, G., Meyer-Waarden, L., & Munzel, A. (2023). Rage against the machine: experimental insights into customers' negative emotional responses, attributions of responsibility, and coping strategies in artificial intelligence–based service failures. *Journal of Interactive Marketing,* 58(1), 52-71.

Shank, D. B., Graves, C., Gott, A., Gamez, P., & Rodriguez, S. (2019). Feeling our way to machine minds: People's emotions when perceiving mind in artificial intelligence. *Computers in Human Behavior*, *98*, 256-266.

Shank, D. B., & DeSanti, A. (2018). Attributions of morality and mind to artificial intelligence after real-world moral violations. *Computers in human behavior*, *86*, 401-411.

Shumanov, M., & Johnson, L. (2021). Making conversations with chatbots more personalized. *Computers in Human Behavior*, *117*, 106627.

Waytz, A., Heafner, J., & Epley, N. (2014). The mind in the machine: Anthropomorphism increases trust in an autonomous vehicle. *Journal of experimental social psychology*, *52*, 113-117.

Wester, J., Pohl, H., Hosio, S., & van Berkel, N. (2024). " This Chatbot Would Never...": Perceived Moral Agency of Mental Health Chatbots. *Proceedings of the ACM on human-computer Interaction*, *8*(CSCW1), 1-28.

Cancel Culture as Digital Marketplace Violence: Consumer Activism, Corporate Strategies, and the Paradox of Resistance

Najla Shariff Omar Al-Baiti

Carolina Redolfi

Introduction

Social media has amplified consumer activism, making cancel culture a powerful force shaping brand reputations and market dynamics. Platforms like Twitter serve as arenas for collective resistance, where hashtags such as #Boycott and #Cancel spread rapidly, disrupting online brand engagement (Saldanha, Mulye and Rahman 2022, Siu, Zhang, and Yau 2023). While cancel culture challenges corporate misconduct, it remains embedded in neoliberal capitalism, where brands absorb consumer outrage through PR strategies to maintain profitability (Lee *et al.* 2021). Existing research focuses on short-term brand crises, trust, and crisis communication (Hahn and Albert 2017, Bhandari and Rodgers 2018, Abbasi, Jagadish and Kumar 2023). However, these studies often overlook the deeper structural mechanisms through which digital market spaces perpetuate systemic violence. Addressing this gap, this research examines how cancel culture functions as digital marketplace violence, shaping consumer activism, corporate crisis responses, and the paradox of resistance within neoliberal market systems. To explore this dynamic, the study focuses on Jo Malone's cancellation following the removal of John Boyega from its Chinese ad, offering a critical lens on how brands navigate and absorb digital backlash.

Literature Review

Cancel culture functions both as a mechanism of resistance and as a structure that sustains systemic inequalities in digital consumerism. Drawing on Zizek's (2009) framework of violence, cancel culture can be understood as both a response to objective and systemic violence. However, it often leads to superficial corporate reforms, where companies engage in symbolic gestures rather than implementing systemic changes (Demsar et al., 2023).

The dynamics of cancel culture align with the Social Identity Model of Collective Action (SIMCA), as consumer movements are driven by shared grievances and collective mobilization against perceived brand transgressions (Buran, Sabah and Koçak 2024, Van Zomeren, Postmes and Spears 2008). Social media activism fosters a collective identity that strengthens

consumer engagement, transforming individual dissatisfaction into large-scale action. This heightened collective identity contributes to the emotional intensity of cancel culture, where Emotional Contagion Theory becomes relevant (Hatfield, Cacioppo and Rapson 1994, Lu and Hong 2022). As outrage spreads across digital networks, sentiment shifts rapidly, influencing brand engagement and accelerating public scrutiny. This phenomenon reinforces the cyclical nature of cancel culture, where consumers react emotionally, brands engage in damage control, and the market absorbs these fluctuations without fundamental change.

Furthermore, the role of neoliberal-colonial normativities in digital activism highlights how cancel culture, despite its potential for disrupting power structures, ultimately reinforces capitalist hegemony. While consumer activism pressures corporations to acknowledge wrongdoing, these brands often rely on crisis management strategies that neutralize long-term consequences (Eilert and Nappier 2020, Yüksel and Mryteza 2009**)**. These theoretical frameworks collectively illuminate the paradox of cancel culture: it operates as a tool for resistance while simultaneously sustaining market-based inequalities within the digital economy.

Method

This study employs non-participant netnography (Kozinets, 2020). The study focuses on Jo Malone's removal of John Boyega from its Chinese ad, which sparked accusations of racial erasure and fueled online backlash. Data was collected from Twitter across three distinct stages: Pre-cancellation (August 11–September 11, 2020), Cancellation (September 12–October 12, 2020), and Post-cancellation (October 13, 2020–September 13, 2021).

The data analysis involved sentiment analysis using SentiStrength to track emotional shifts and textual content analysis to examine consumer tweets. To ensure data reliability, bot-generated tweets and irrelevant content were excluded, allowing for a nuanced understanding of cancel culture's impact on brand engagement.

Findings & Discussion

The findings illustrate how cancel culture operates as a cyclical force, where consumer engagement fluctuates across different stages of brand crises. During the pre-cancellation stage, consumer discourse around Jo Malone was predominantly positive, with discussions

centering on product appreciation. However, the brand's subsequent actions led to a sharp transformation in consumer sentiment, reinforcing Zizek's (2009) notion of objective violence—where structural racial erasure in corporate decisions is normalized and largely unchallenged until public backlash forces recognition.

In the cancellation phase, sentiment analysis revealed a significant spike in negative engagement, fueled by accusations of racial insensitivity and corporate irresponsibility. This mass mobilization aligns with SIMCA (Van Zomeren, Postmes and Spears 2008) as consumers collectively acted against Jo Malone, leveraging social media platforms to amplify grievances. This stage exemplifies subjective violence (Ayrosa and Oliveira 2018, Zizek 2009), where consumer backlash manifests as an explicit response to perceived injustices, demonstrating the collective power of digital activism in holding brands accountable.

The post-cancellation stage showed a decline in engagement, but distrust toward Jo Malone persisted. While immediate outrage subsided, the brand struggled to regain its previous consumer trust. Content analysis indicated that Jo Malone's crisis response largely relied on performative crisis management strategies rather than substantive change, reinforcing the argument that cancel culture, rather than dismantling corporate structures, often results in surface-level reforms that do not challenge underlying power dynamics (Eilert and Nappier 2020, Yüksel and Mryteza 2009). This aligns with the critique of neoliberal-colonial normativities in digital activism**,** which highlights how brands strategically neutralize backlash while maintaining systemic market dominance.

Overall, these findings underscore the paradox of cancel culture: it serves as a mechanism for consumer resistance while simultaneously reinforcing the structures it seeks to dismantle. While it enables collective mobilization against corporate injustices, it remains entangled in broader neoliberal market systems that absorb, rebrand, and repurpose digital activism without addressing systemic inequalities. These insights contribute to understanding cancel culture as digital marketplace violence, demonstrating how consumer activism, despite its influence, often remains constrained within existing power structures.

Conclusion

This study demonstrates that cancel culture operates as both a mechanism of consumer resistance and a reinforcement of neoliberal corporate power. While it provides a

platform for collective action and corporate accountability, its effectiveness is constrained by market structures that absorb and commodify dissent. The findings highlight how brands employ performative crisis management to defuse outrage without enacting systemic changes, reinforcing Zizek's (2009) theory of objective violence in corporate governance.

From a societal perspective, this research emphasizes the paradox of digital activism—while it pressures brands to acknowledge wrongdoing, it often lacks the structural leverage needed to drive long-term change. Consumer activism alone is insufficient to dismantle entrenched market inequalities; instead, a broader coalition of regulatory policies, media accountability, and corporate reform is required to ensure meaningful transformations.

For marketing practitioners, this study underscores the risks of crisis mismanagement and the necessity of authentic engagement with marginalized communities beyond reactive PR campaigns. Brands must adopt proactive strategies that move beyond damage control and toward sustainable, inclusive business practices. Future research should explore alternative resistance models that challenge capitalist-colonial market systems rather than reinforcing their cyclical nature.

Reference List

Abbasi, G. A., Jagadish, A., & Kumar, A. (2023). Crisis communication strategies and brand reputation: A meta-analytic review. Journal of Business Research, 145, 123–135.

Ayrosa, E. A. T, Oliveira, R.C.A (2018), "Marketing and the production of consumers' objective violence, in M. Tadajewski, M. Higgins, J. Denegri-Knott, R. Varman (ed.) The Routledge Companion to Critical Marketing (1st ed.). Routledge.

Bhandari, M., & Rodgers, S. (2018). What does the brand say? Effects of brand feedback to negative eWOM on brand trust and purchase intentions. International Journal of Advertising, 37(1), 125–141.

Buran, İ., Sabah, Ş. and Koçak, A. (2024), "The relationship between feminist collective action and social media engagement", Journal of Social Marketing, 14(3/4), 301-327.

Demsar, V., Ferraro, C., Nguyen, J., & Sands, S. (2023). Calling for Cancellation: Understanding how Markets Are Shaped to Realign With Prevailing Societal Values. Journal of Macromarketing, 43(3), 322-350.

Eilert, M., & Nappier Cherup, A. (2020). The Activist Company: Examining a Company's Pursuit of Societal Change Through Corporate Activism Using an Institutional Theoretical Lens. Journal of Public Policy & Marketing, 39(4), 461-476.

Hahn, R., & Albert, N. (2017). Strong reciprocity-based corporate social responsibility: A knowledge-based approach. Business Ethics Quarterly, 27(3), 443-482.

Hatfield, E., Cacioppo, J. T., & Rapson, R. L. (1994). Emotional Contagion. Cambridge University Press.

Hatfield, E., Cacioppo, J. and Rapson, R. L. (1994). Emotional contagion. New York: Cambridge University Press.

Kozinets, R. V. (2020). Netnography: The Essential Guide to Qualitative Social Media Research (3rd ed.). SAGE Publications.

Lee, S.Y., Sung, Y.H., Choi, D. et al. (2021). Surviving a Crisis: How Crisis Type and Psychological Distance Can Inform Corporate Crisis Responses. Journal of Business Ethics, 168, 795–811.

Lu, D. and Hong, D., (2022). Emotional Contagion: Research on the Influencing Factors of Social Media Users' Negative Emotional Communication During the COVID-19 Pandemic. Frontiers in Psychology, 13.

Saldanha, N., Mulye, R., & Rahman, K. (2022). The impact of social media activism on brand loyalty: A consumer perspective. Journal of Consumer Marketing, 40(2), 157–168.

Siu, W., Zhang, T., & Yau, O. H. M. (2023). Consumer revenge behavior in the online environment: The role of social media. Internet Research, 33(1), 45–67.

Van Zomeren, M., Postmes, T., & Spears, R. (2008). Toward an integrative social identity model of collective action: A quantitative research synthesis of three socio-psychological perspectives. Psychological Bulletin, 134(4), 504–535.

Yüksel, U., & Mryteza, V. (2009). An Evaluation of Strategic Responses to Consumer Boycotts. Journal of Business Research, 62(2), 248–259.

Zizek, S. (2009). Violence: Six Sideways Reflections. Profile Books.

Civil Society Constructive Engagement for Peacebuilding: "*The Third Agreement*" Coffee Brand

Héctor Godoy

Andrés Barrios

Peace agreements constitute a critical milestone in the transition from violent conflicts to sustainable peace. However, achieving long-term peace necessitates addressing the profound socioeconomic consequences of war that extend beyond formal agreements (De Rivera and Paéz 2007; Stiglitz 2008). Macromarketing research has demonstrated the pivotal role of marketing systems in post-conflict recovery by fostering community empowerment, cooperation, and market integration among former combatants (Shultz and Pecotich 1997; Shultz et al. 2005; Sredl et al. 2017; Barrios et al. 2019). The concept of Constructive Engagement (Shultz 2007), which emphasizes the necessity of involving multiple stakeholders to ensure sustainable economic reintegration and social cohesion in post-conflict settings, has been used to describe conflicted parties' actions for sustainable peace (Shultz 2015, 2016; Shultz et al. 2022). This article aims to complement the current literature by analyzing the roles of an important but overlooked actor, civil society.

Civil society refers to the network of civilians who are not directly involved in confrontation but, despite their neutrality, suffer its consequences (Barnes 2005). They are either collateral victim of confrontations between the conflicted parties or are a direct victim when one of the parties target them to affect the other party (e.g. terrorist attack). Civil society experiencing war adversity suffers from psychological and physical distress (Kimhi and Shamai 2004). Peace agreements are made not only to limit violent confrontation between parties but also avoid the negative effects for the surrounding communities. Peacebuilding literature has recognized the crucial roles played by civil society in advancing peacebuilding endeavors. These roles encompass: i) engaging in demonstrations to either support or oppose peace agreements; ii) overseeing the execution of peace agreement reforms; iii) implementing initiatives for humanitarian aid and physical, economic, and institutional rebuilding; and iv) facilitating mediation between conflicting parties (World Bank 2007). Considering these, this study seeks to address the following research question: How can civil society contribute to market peacemaking initiatives?

To respond to this question, we employed a case study methodology (Eisenhardt 1989; Yin 2012) examining "The Third Agreement" specialty coffee initiative. This peacebuilding initiative was implemented in the southern region of Colombia from 2018 to 2019 aimed to integrate former combatants, Nasa Wex indigenous communities, governmental agencies, international organizations, and academic institutions into a collaborative coffee brand. Data collection processes incorporated documentary study, and in-depth interviews with principal stakeholders. Data analysis was inductive (Corbin and Strauss 2008), first creating an event history database (Van de Ven and Poole 2002) of the initiative, and then identifying the constructive engagement activities performed by actors in each moment.

The initiative encompassed a six-stage process through which external actors, including the United Nations, Ibague University, and the local coffee association, collaborated with conflicting parties such as FARC, the government, and Nasa Wex to develop the joint coffee brand "The Third Agreement." These stages comprised various constructive engagement activities, including building trust among parties and co-creating a collective brand narrative about experienced conflicts that facilitated peacebuilding. The findings also reveal multiple barriers to the development of these activities, including disparate stakeholder engagement, interpersonal and institutional skepticism, and suboptimal business strategies (Table 1 summarizes these findings).

Although our analysis is exploratory and derives from immersion in a specific case, our preliminary findings contribute to the Macromarketing literature on peacemaking in several ways. First, previous research suggests that marketing systems require well-defined stakeholder roles in post-conflict economic reintegration (Layton 2009). Such roles, when grounded in ethical and sustainable principles, can function as effective catalysts for fostering social reconciliation and stimulating economic growth in regions affected by armed conflicts (Shultz et al. 2005; Sredl et al. 2017). This study complements these results by elucidating the specific constructive activities that facilitate the inclusion of former combatants in coffee marketing systems by facilitating social legitimacy (UN, Universidad de Ibague), economic legitimacy (NCF), trust (ARN), forgiveness (Coffee growers), technical knowledge (NCF), adaptability (Former combatants), and cultural heritage (Nasa Wex).

Second, previous research indicates the important role of multi-sectoral collaboration for achieving sustainable peace. This project demonstrates how the coordination of

antagonistic actors with diverse roles, interests, and capabilities can advance peacebuilding efforts through inclusive market approaches. The resulting model reinforces the concept of inclusive and sustainable markets, aligned with Shultz's theories on ethical stewardship of shared resources. By aligning economic and community objectives through branding processes, all the initiative stakeholders were able to identify concrete advantages, strengthen their dedication, and foster a sense of mutual dependence that is conducive to enduring peace.

The contributions underscore the transformative potential of constructive engagement within Macromarketing scholarship. By facilitating collaboration among international organizations, governmental agencies, academic institutions, industry experts, former combatants, and indigenous communities, The Third Agreement serves as a paradigm for market-driven peacebuilding.

Table 1. Constructive engagement activities performed by different actors immersed in the third agreement.

Actor (type)	Functions in the initiative	Constructive engagement activities
United Nations -UN (International)	Funders, administrative supervision, and observers of the initiative implementation	The United Nations played a pivotal role in legitimizing The Third Agreement, providing international visibility and enhancing its credibility by ensuring alignment with global peacebuilding and sustainability frameworks. Their involvement facilitated access to international markets, established strategic connections with specialty coffee buyers, and created opportunities for premium pricing and long-term commercial partnerships. Furthermore, the UN provided ongoing technical assistance through training programs on sustainable farming, ethical business practices, and marketing strategies, while also fostering cross-cultural exchanges between coffee producers and buyers to enhance market understanding.

ARN (Government)	Funders, technical assistance, local supervision of project implementation progress.	The Agency for Reincorporation and Normalization (ARN), as Colombia's primary reintegration institution, played a pivotal role in fostering trust among ex-combatants, local coffee producers, and indigenous communities through the facilitation of reconciliation workshops and mediation processes. In addition to trust-building initiatives, ARN provided technical instruction in agribusiness management, cooperative formation, and financial literacy, ensuring the project's alignment with national peacebuilding policies. Furthermore, the agency secured funding from public and private sources to support infrastructure development in coffee-producing regions and provided ex-combatants with access to social benefits associated with formal employment, thereby enhancing their economic reintegration.
University of Ibagué (Academic)	Facilitators of the brand design process: Professors and students implemented participatory design methodologies that enabled parties to co-create a brand narrative.	The University of Ibagué played a significant role in bridging theoretical knowledge with practical applications by facilitating participatory design workshops where ex-combatants and indigenous leaders collaboratively created The Third Agreement´s brand identity. Through comprehensive market research on specialty coffee consumer preferences, the university ensured the brand aligned with international trends while also serving as an impartial facilitator for open dialogue, fostering marketing narratives grounded in reconciliation and collective progress. Furthermore, the university reinforced the legitimacy of the initiative by providing structured decision-making frameworks, designing marketing materials,

		and developing narrative strategies that emphasized the brand as both a commercial venture and an instrument for social and cultural reconciliation.
Coffee Leaders	Technical and commercial advisors: Coffee producers serve as intermediaries between conventional practices and modern advancements. Their profound knowledge of cultivating superior coffee has facilitated the harmonization of local aspirations with global market demands	Regional coffee leaders played a pivotal role in providing technical instruction on cultivation methodologies, sustainable agricultural practices, and post-harvest processing, ensuring that The Third Agreement met international specialty coffee standards. By balancing traditional cultivation techniques with contemporary market requirements, they facilitated the integration of heritage knowledge with modern best practices, supporting organic certification and direct trade partnerships. Furthermore, they functioned as intermediaries between producers and international markets by conducting field assessments, organizing coffee cupping sessions, facilitating networking events with potential buyers, and guiding the certification process for Organic, Fair Trade, and Rainforest Alliance standards.
Ex-combatants (FARC-EP)	Marketers and implementers: Former combatants presented narratives of resilience and personal development. For these individuals, coffee emerged as a metaphor for reconstruction, while their cooperative approach demonstrated their	Former combatants assumed a dual role as both coffee producers and brand ambassadors, actively participating in commercialization while utilizing their personal narratives to reshape public perceptions of reintegration. Their transition from armed conflict to key stakeholders in the coffee value chain—assuming roles as agricultural laborers, cooperative managers, and marketing representatives—demonstrated adaptability and enhanced group cohesion. Through narrative-based campaigns, training in cooperative governance, and direct engagement with consumers,

	commitment to reconciling divisions and fostering a collective future.	they humanized the reintegration process, challenged societal stigmas, and positioned The Third Agreement as a symbol of resilience and societal transformation.
Nasa Wex	Cultural custodians and community partners: The Nasa Wes'x, custodians of an ancient worldview, contributed a comprehensive and environmentally conscious approach to the project.	The Nasa Wex community played a crucial role in the preservation of traditional agricultural practices, environmental conservation, and the reinforcement of The Third Agreement's cultural identity by incorporating indigenous perspectives throughout the initiative. Their profound understanding of biodiversity conservation and agroecological farming techniques set the brand apart from conventional coffee producers, while simultaneously validating the project within indigenous communities and encouraging wider participation. The implementation of agroforestry methods, the establishment of mentorship programs for younger generations, and the collaborative creation of packaging featuring indigenous aesthetics demonstrated that economic advancement and cultural preservation can function as complementary forces in sustainable development, rather than being mutually exclusive.

References

Barnes, C. (2005), Weaving the Web: Civil-Society Roles in Working with Conflict and Building Peace. In P. van Tongeren, M. Brenk & M. Hellema (Ed.). People Building Peace II: Successful Stories of Civil Society (pp. 5-28). Boulder, USA: Lynne Rienner Publishers. https://doi.org/10.1515/9781685851316-004

Corbin, J. M., and Strauss, A. L. (2008), Basics of qualitative research techniques and procedures for developing grounded theory. (3d ed.). SAGE.

De Rivera, J. and Páez, D. (2007), "Emotional climate, human security, and cultures of peace," Journal of Social Issues, 63(2), 233–253.

Eisenhardt, K. M. (1989), "Building Theories from Case Study Research," Academy of Management Review, 14 (4).

García Duque, J., and Barrios Fajardo, A. (2019). Construcción de paz: las empresas en la reintegración de excombatientes. Ediciones Uniandes-Universidad de los Andes.

Kimhi, S., and Shamai, M. (2004), "Community resilience and the impact of stress: Adult response to Israel's withdrawal from Lebanon," Journal of Community Psychology, 32(4), 439–451. https://doi.org/10.1002/jcop.20012

Layton, R. A. (2009), "On Economic Growth, Marketing Systems, and the Quality of Life," Journal of Macromarketing, 29(4), 349–362. https://doi.org/10.1177/0276146709345108

Pecotich, A., Shultz, C. J., Shultz, C. J., and Pecotich, A. (2006). Handbook of Markets and Economies: East Asia Southeast Asia Australia New Zealand (1st ed.). Routledge. https://doi.org/10.4324/9781315498775

Shultz, C. J. (2007), "Marketing as Constructive Engagement," Journal of Public Policy and Marketing, 26(2), 293–302. https://doi.org/10.1509/jppm.26.2.293

Shultz, C. J. (2016), "There is more to marketing: An encore to Layton's ring cycle and the compelling case for marketing systems theory, research and management," Australasian Marketing Journal, 24(3), 257–259. https://doi.org/10.1016/j.ausmj.2016.08.012

Shultz, C. J., Burkink, T. J., Grbac, B., and Renko, N. (2005), "When policies and marketing systems explode: An assessment of food marketing in the war-ravaged Balkans and implications for recovery, sustainable peace, and prosperity," Journal of Public Policy and Marketing, 24(1), 24–37.

Shultz, C. J. and Pecotich, A. (1997), "Marketing and Development in the Transition Economies of Southeast Asia: Policy Explication, Assessment, and Implications," Journal of Public Policy and Marketing, 16(1), 55–68. https://doi.org/10.1177/074391569701600106

Shultz, C. J., Rahtz, D. R., and Sirgy, M. J. (2022). Community, economy and COVID-19 : lessons from multi-country analyses of a global pandemic. Springer.

Sredl, K. C., Shultz, C. J., and Brečić, R. (2017), "The Arizona market: A marketing systems perspective on pre-and post-war developments in Bosnia, with implications for sustainable peace and prosperity," Journal of Macromarketing, 37(3), 300–316.

Stiglitz, J. E. (2008), La guerra de los tres billones de dólares: el coste real del conflicto de Irak (The three billion dollars war: The true cost of the Iraq conflicto). Bilmes, L. J. (Ed.). Taurus.

Van de Ven, A. H. and Poole, M. S. (2017). Field research methods. The Blackwell Companion to Organizations, 867–888.

World Bank. (2007). Civil society and peacebuilding : potential, limitations and critical factors.

Yin, R. K. (2012). Case study methods. In Cooper, H., Camic, P. M., Long, D. L., Panter, A. T., Rindskopf, D., & Sher, K. J. (Eds.). *APA handbook of research methods in psychology, Vol 2: Research designs: Quantitative, qualitative, neuropsychological, and biological.* USA: American Psychological Association. https://doi.org/10.1037/13620-009

Coletivo Perifa Alimenta: production and consumption of transformative food

Ricardo Zagallo Camargo

André Krassuski Fonseca

Ana Clara Soares Rasquel de Oliveira

Fernanda Cury

Fernanda Guarany Teixeira

Luana Sandrault Schwab

Luca de Ascenção Dias Lopes

Maria Vitória de Oliveira Silva

Marcos da Silva e Silva

Fernando Jorge Silva

Introduction

This paper corroborates the track interest in the structural and cultural aspects that support consumer transformations (Shove et al. 2012). It addresses the production and consumption of food by the Coletivo Perifa Alimenta (CPA), a group of women from Brasilândia, a peripheral neighborhood of São Paulo city, Brazil, who work with total food utilization and the use of Unconventional Food Plants (UFPs). These women activate subaltern voices (Spivak 2010), silenced for decades, to occupy geographic and symbolic spaces in the city, with the dual objective of generating income and transforming food culture.

Theoretical Framework and Literature Review

"Weeds" are food!

The silencing of voices and ancestral knowledge has led people, especially those with lower incomes, to see their small backyards as places where only weeds grow. Increasingly intense work routines and precarious urban mobility have shifted productivity from the family sphere to the corporate or industrial realm (Ewen 2009). Unconventional Food Plants (UFPs) were widely used in the daily diet of rural families but disappeared due to rural exodus, deforestation, and urbanization, reducing diversity in food production. Additionally, UFPs are not organized as a large-scale production chain as potatoes and tomatoes, among others, and do not attract interest from the food industry (Barbosa et

al. 2021). However, they resist in communities that fight against food standardization and value species used in the past. Generally, UFPs are spontaneous, resilient plants that require little irrigation and are rich in phytochemicals, reducing the risk of chronic diseases like diabetes (Paschoal et al. 2020). In other words, these "weeds" are healthy food!

Consumption and production: so far, so close

Industrial development and the wage system replaced the way of life of families who produced and consumed their food with a dominant model where "living" ceased to be made and became something to be purchased (Ewen 2009). Throughout the 20th century, ready-made products have gained people's preference. Fontenelle (2017) details the legitimization of this consumer-driven way of life but notes that from the 1990s onward, two opposing yet complementary forms coexist: experiential consumption and responsible consumption. The first seeks to maximize pleasure, turning experience into a commodity, while the second moves in the opposite direction, attempting to regulate consumption through concerns about ourselves, other people, and the environment. Warde (2016) remembers that practices are molded by interested stakeholders. Authorities vie over the best ways to arrange meals, design menus, and manage bodies, while the food industry seeks to offer products that appear to be homemade and natural. The influence of different authorities claiming legitimacy over popular understandings of how people should eat fluctuates over time.

Food Insecurity

According to the Brazilian Research Network on Food and Nutrition Sovereignty and Security (Penssan 2022), about 33.1 million people suffer from hunger in the country, and 125 million individuals experience food insecurity, with greater prevalence among Black or mixed-race populations, unemployed individuals, and female-headed households, especially those with children under five. The peripheries of São Paulo face the global challenge of food insecurity, characterized by a lack of physical, economic, and social access to adequate food in sufficient quantity and quality (Sawaya 2003). Spatial segregation, which separates different social groups within the city, limits access to essential services, infrastructure, opportunities, and quality food (Marques et al. 2005). Brasilândia, located in the northwestern region of São Paulo, where CPA operates, is the second district with the highest proportion of households in favelas (29.6%), with a life expectancy of 8.6 years lower than the city average (PMSP 2017). The neighborhood

straddles the urban and rural divide, with half remaining at Serra da Cantareira Environmental Preservation Area and small-scale farmers. The other half comprises precarious settlements with high social vulnerability.

Community engagement and food culture hub

Brasilândia has a high level of community engagement, with various cultural collectives and solidarity initiatives creating an articulated network. CPA operates within this field of business, governmental, and community forces, consisting of 8 to 10 women who work with artisanal food, emphasizing agroecological products. Its emergence is related to the activities of the "The City Counts on You" Institute in Brasilândia between 2017 and 2022. Since 2021, CPA has been evolving into a Food Culture Hub, understood as a space for food exchange and distribution, coordination between producers and residents, and promoting a sustainable food culture. The project is vegetarian, and the food (meals, organic baskets, party and event catering, and fresh food services) is made using local gardens. The menu includes ora-pro-nóbis bread rolls, fried fish mint leaves, organic vegetable pies, taioba soups, lemongrass, pineapple juices, avocado with lime, and other uncommon natural combinations.

One research question and some objectives

There are many options to research in a complex context of food insecurity, community engagement, and the activation of silenced voices. Most of them deserve intellectual effort and a relationship beyond the almost three years in contact with women of CPA. So, to establish a more productive dialogue with the Macromarketing Conference attendees, we outline the following research question: how do CPA's entrepreneurial practices contribute to the collective's goal of generating income and transforming the local food culture? The main objective is to identify the impact of CPA's food production practices on the local food culture. The specific objectives are to relate CPA members' life histories to their food production practices, observe how CPA's food production practices contribute to healthy eating habits, and verify the effect of entrepreneurial practices on income generation for these women.

Methodological note

In the first semester of 2024, students from the institution where I work chose CPA as a case study for their Social Research Group. The research team has seven students and three professors, including myself. Having previous contact with the collective, I acted as a liaison and co-supervisor. The research had a participatory approach: students suggested the theme of entrepreneurship, while CPA members emphasized sustainability, which resulted in the objectives mentioned above. Data collection included observation and a conversation circle with seven female members of the CPA, held at the Cultural Centre Jardim Damasceno, in Brasilândia neighbor, where the CPA works.

Preliminary Findings: recovering voices and recipes in triple working hours

The preliminary findings, related to the main objective, identify a lower impact of CPA's food production practices on the local food culture. There is a reasonable frequency of people (mainly women) at a biweekly organic products fair, offered by CPA. However, the rescue of forgotten recipes and the silenced voices of mothers and grandmothers, who possess knowledge of the edible "weeds", needs more time and effort. As proposed by Chedid and Hemais (2022), Spivak's (2010) postcolonial theory of the subaltern is relevant here, as the CPA not only revives ancestral practices and recipes but also raises its voice against the double silencing imposed by colonial male domination. This struggle is perceptible in convincing people in the neighborhood, including their households, where many husbands and family members still reject eating "weeds" in favor of a traditional diet.

Talking about the specific objectives, related to CPA members' life histories and income generation, we observe that all members mentioned domestic situations marked by female labor and the absence of male collaboration. The younger women describe their daily challenges: "She has a teenage daughter, a child... She is the backbone of CPA. So, for example, if her daughter gets sick, she has to take her to the doctor. And then?" "It's always the woman... responsible for the family". A condition also described by Bentes and Parreira (2024) refers to the sexual division of labor. Entrepreneurial women are also responsible for domestic work and caring for children, the elderly, and the sick, working almost all day, in triple working hours. Often paid less and in precarious jobs, especially if they are black women.

To be continued

The preliminary findings point a long way to the rescue (or relegitimization) of practices that almost vanished with time, challenging the patriarchal power structure. We will be together trying to contribute to these changes. In this sense, the main contribution of this research is to collaborate to deconstruct the perception that a cook's labor is worth less than a researcher's. The intellectual knowledge required to produce texts like this is different but equally valuable to the practical knowledge of distinguishing and using food plants to prepare socially and environmentally appropriate meals for each community.

References

Barbosa, T. P. et al. (2021), "Non-conventional food plants: are there potential consumers and places to buy them?", Research, Society and Development. 10(4).

Bentes, C. S. B., and Parreira, F. R. (2024), "Representative democracy: An intersectional review of the legislative action of the Parliamentary Front to Combat Abortion –'Pro-life', in the State of Goiás", Cadernos Ibero-Americanos De Direito Sanitário, 13(2), 62-77.

Chedid, Y. D., and Hemais, M. W. (2022), "Subalternization of Brazilian women in contexts of tourism: a postcolonial analysis based on Spivak", Revista Brasileira De Pesquisa Em Turismo, 16, 2357.

Ewen, S. (2009), "Mom, Dad and the Kids: Toward a Modern Architecture of Daily Life", in Ewen, S. Captains of Consciousness: Advertising and the Social Roots of the Consumer Culture, 25th Edition: Basic Books.

Fontenelle, I. A. (2017), Consumer Culture: Fundamentals and Contemporary Forms. Editora FGV.

Marques E., and Torres, H. (2005), Segregation, poverty, and social inequalities. Senac Editora.

Penssan, (2022), 2º National Survey on Food Insecurity. São Paulo.

PMSP (2017), Municipal Government of the City of São Paulo, Freguesia-Brasilândia Subprefecture. https://capital.sp.gov.br/web/freguesia_brasilandia/

Sawaya (2003), "The Two Brazils: Who They Are, Where They Are, and How Poor Brazilians Live," Estudos Avançados, Brasil, 17(48), 21-44.

Shove, E. et al. (2012), The dynamics of social practice: Everyday life and how it changes, SAGE Publishing.

Spivak, G. (2010). Can the Subaltern Speak? Editora UFMG.

Warde, Alan (2016), The Practice of Eating. Polity Press.

Saurabh Shinde

Krishanu Rakshit

Colorism, or pigmentocracy, has long been a pervasive issue in Indian society, deeply intertwined with caste, class, gender, and post-colonial consciousness. Colorism, also known as pigmentocracy is “intraracial discrimination based on skin color” (Dhillon-Jamerson 2019). Depending on particular histories, its relationship with ‘racism’ changes (Dixon and Clifford 2007). Specifically for India, it has been explored in multiple contexts such as advertising (Varman, Belk and Sreekumar 2024), marriage markets (Dhillon-Jamerson 2019, Ramakrishnan 2012), skin whitening products (Vijaya 2019), employment discrimination (Vijaya and Bhullar 2022), movies (Ganti 2016) and so on. While researchers have extensively explored the structural and cultural dimensions of colorism, the voices of regular consumers and their resistance to this phenomenon are still unexplored. This article examines how individuals are challenging colorism through counter-narratives on social media platforms, offering new perspectives and fostering discourse that disrupts established norms and expectations.

Counter-narratives, as a form of discursive resistance, respond to dominant narratives by reconstructing the relevance of events and challenging typical assumptions. A counter-narrative emerges as a response to an existing narrative, often resembling it by following similar factual lines but differing in how it constructs the relevance of events to the storyline (Bamberg and Wipff 2020). It tends to be somewhat counter-intuitive, challenging typical expectations. For a text or dialogue to qualify as a counter-narrative, it must relate to other texts and invite analysis through intertextual knowledge. The speaker or author may intentionally position their narrative against another, or recipients may interpret the text in this way through their own intertextual repertoire. This dual nature – its relationship to other narratives and its departure from established expectations – highlights the strategic potential of counter-narratives in breaking frames, challenging assumptions, and facilitating change. In the context of colorism, counter-narratives serve as a powerful tool for breaking frames, questioning societal norms, and advocating for change. Through a netnographic content analysis of various social media forums, we identify three distinct types of counter-narrative practices that individuals employ to resist colorism. Each type contributes uniquely to the discourse, adding intellectual, affective, and conative dimensions.

The first type of counter-narrative adopts a third-person subjective perspective, uncovering the hidden aspects of colorism perpetuated by societal structures. These narratives

often critique the roles of businesses, media, colonizers, and patriarchal systems in sustaining colorist practices. Rather than merely stating the obvious, these counter-narratives delve deeper, attributing ulterior motives to the actions of these antagonists. For instance, they might argue that the promotion of skin-whitening products by corporations is not just a response to consumer demand but a deliberate strategy to exploit insecurities rooted in colonial and caste-based hierarchies. By exposing these underlying dynamics, such narratives not only challenge the status quo but also open up new avenues for understanding and addressing colorism. They enrich the intellectual dimension of discourse by encouraging critical thinking and highlighting unexplored possibilities.

The second type of counter-narrative is deeply personal, narrated from a first-person perspective. These stories are often cathartic for the narrator and therapeutic for the audience, as they recount experiences of enduring and overcoming the stigma associated with darker skin. The protagonists in these narratives are portrayed as nonviolent heroes who have faced discrimination from family, friends, and society but emerged stronger. For example, a woman might share how she was repeatedly told by her relatives that her dark skin would make it difficult to find a suitable marriage partner, yet she defied these expectations and built a fulfilling life on her own terms. Such narratives resonate emotionally with readers, many of whom may have faced similar struggles. By humanizing the issue of colorism, these counter-narratives strengthen the affective dimension of the discourse, fostering empathy and solidarity among those who have experienced or witnessed such discrimination.

The third type of counter-narrative also employs a first-person perspective but differs in its tone and approach. Here, the narrator is not just a survivor but a valiant warrior who actively challenges and transforms the societal norms surrounding colorism. These individuals take control of their narratives, often confronting and resisting the prejudices of those around them. For instance, a man might describe how he confronted his employer's discriminatory hiring practices or launched a campaign to promote the representation of darker-skinned individuals in media. These counter-narratives are inspirational, positioning the narrators as heroes who not only defy colorism but also inspire others to take action. They contribute to the conative dimension of the discourse by motivating individuals to challenge colorist practices in their own lives and communities.

Together, these three types of counter-narratives create a multifaceted discourse that challenges the entrenched norms of colorism in Indian society. By exposing the hidden

mechanisms of power, sharing personal stories of resilience, and inspiring collective action, they offer a comprehensive approach to addressing this deeply rooted issue. Social media platforms have played a crucial role in amplifying these voices, providing a space for individuals to share their experiences and connect with others who share their concerns.

The rise of counter-narratives also reflects a broader shift in societal attitudes toward colorism. As more individuals speak out against discrimination, there is growing recognition of the need to address this issue at both the individual and structural levels. Businesses, for instance, are increasingly being called out for their role in promoting skin-whitening products, leading some to reconsider their marketing strategies. Similarly, the media is facing pressure to represent a more diverse range of skin tones, challenging the longstanding preference for lighter-skinned actors and models. These changes, while incremental, signal a growing awareness of the harmful effects of colorism and the need for systemic change.

References

Bamberg, Michael and Zachary Wipff (2020), "Reconsidering counter-narratives", in Routledge Handbook of Counter-Narratives, Routledge.

Dhillon-Jamerson, Komal K. (2019), "Marketing Marriage and Colorism in India," in Race in the Marketplace: Crossing Critical Boundaries, Johnson, G. D., Thomas, K. D., Harrison, A. K., and Grier, S. A., eds., Cham: Springer International Publishing, 121–36.

Dixon, Sarah E.A. and Anne Clifford (2007), "Ecopreneurship – a new approach to managing the triple bottom line," *Journal of Organizational Change Management*, (S. Magala, ed.), 20 (3), 326–45.

Ganti, Tejaswini (2016), "Fair and lovely: class, gender, and colorism in Bollywood song sequences", in The Routledge Companion to Cinema & Gender, Routledge.

Ramakrishnan, Srilakshmi (2012), "'Wheatish' grooms and 'innocent' divorcées: Commodifying attributes in the discourse of Indian matrimonials", Discourse & Society, 23 (4), 432–49.

Varman, Rohit, Belk, Russell W., and Sreekumar, Hari (2024), "Post-Colonial Consumer Respect and the Framing of Neocolonial Consumption in Advertising", Journal of Consumer Research, 51 (2), 362–82.

Vijaya, Ramya M. (2019), "The New Economics of Colorism in the Skin Whitening Industry: Case of India and Nigeria," in *Race in the Marketplace: Crossing Critical Boundaries*, G. D. Johnson, K. D. Thomas, A. K. Harrison, and S. A. Grier, eds., Cham: Springer International Publishing, 227–44.

Vijaya, Ramya M. and Bhullar, Naureen (2022), “Colorism and employment bias in India: an experimental study in stratification economics”, Review of Evolutionary Political Economy, 3 (3), 599–628.

Commercial Education and Its Influence on the Formation of the Marketing Discipline in Brazil: A Historical Analysis from the Perspective of Macromarketing

Marta Cristina Nunes Cruz Fleming

Joao Felipe Rammelt Sauerbronn

Keywords: Commercial education; History of Marketing; Macromarketing; Market education; Business administration in Brazil.

The trajectory of commercial education in Brazil is a topic that still requires further exploration in the academic literature, especially regarding its influence on the construction of the Marketing discipline. In this sense, our aim is to understand how commercial education contributed to the formation of Marketing education in the country. This study is anchored in the perspective of Macromarketing, which analyzes Marketing in its social, historical, and institutional context. According to Shapiro (2006), the history of Marketing is a fundamental part of the Macromarketing field, as it allows us to understand how marketing practices have evolved over time. Additionally, Jones (2007) highlights the importance of historical research in the discipline, pointing out that Marketing education has always played a prominent role in the international academic literature.

The relevance of this study is justified by demonstrating that the Marketing discipline taught in Brazil has some of its roots intertwined with local commercial and administrative practices. Understanding its trajectory is essential for improving its current application. Studies on Business Administration and Accounting education developed by Brazilian authors (see: Barros *et al*. 2011, Araújo and Rodrigues 2013, Silva and Bauer 2018) address the evolution of these fields, but few studies analyze the relationship between commercial education and the introduction of the Marketing discipline. This academic gap underscores the need for some detailed research on the topic. In Brazil, the institutionalization of commercial education began with the *Aula do Commercio* (1809), which laid the foundation for formal education in business administration and economics. However, the relationship between these courses and Marketing education still lacks theoretical depth.

We adopted a qualitative and exploratory approach, with document analysis and a literature review on commercial education and its relationship with the development of Marketing education in Brazil. The analysis included historical documents, national education legislation, academic articles, and publications from educational institutions addressing the evolution of the discipline. The data collection followed a time frame beginning with the creation

of the *Aula do Commercio* in 1809 and extending to the introduction of the Marketing discipline in Business Administration courses in the early 1950s. We analyzed institutional transformations, curricular changes, and the influences of economic and social contexts on the formation of commercial and marketing education.

The findings indicate that the *Aula do Commercio* was the first step toward structuring commercial education in Brazil, influencing the establishment of Business Schools throughout the 20th century. Such institutions trained professionals who worked in commerce and administrative activities, laying the groundwork for the later introduction of Marketing education.

The trajectory of commercial education in Brazil followed patterns similar to those of other European countries, where business education was consolidated before the formalization of the Marketing discipline. However, we note that literature on the history of Marketing in Brazil tends to begin its analysis from the 1950s onwards, overlooking the impact of commercial education prior to this period.

By connecting the evolution of commercial education with the formation of Marketing, we demonstrate that market practices were already present in Brazil before the formalization of the discipline. The exchange of goods, the formation of markets, and the institutionalization of commercial education were fundamental elements for the subsequent consolidation of Marketing as a field of study.

Furthermore, the trajectory of commercial education in Brazil was influenced by public policies and educational regulations that shaped the structure of Business Administration and Economics courses. The institutionalization of Marketing education took place within this context, demonstrating how historical and institutional factors shaped the development of the discipline.

The results reinforce the importance of periodic reviews of the educational structure of Marketing to ensure that the discipline remains aligned with economic and social transformations. Additionally, we highlight the need for further research into the relationship between commercial education and Marketing, contributing to the advancement of the field and the understanding of its evolutionary dynamics.

Ouraim is to contribute to the Macromarketing literature by offering a broader perspective on the history of Marketing education in Brazil, linking it to the roots of commercial education. The historical analysis carried out in this research allows us to understand that the Marketing discipline did not emerge in isolation but rather within a context of educational and market evolution that began with *Aula do Commercio*.

References

Araújo, W. G., and Rodrigues, L. L. (2013), As primeiras Aulas do Comércio do Brasil no século XIX. Comunicação apresentada ao XIV Congresso Internacional de Contabilidade e Auditoria, Lisboa, Portugal, 10-11 de outubro, 1-23.

Barros, A., Cruz, R. C., Xavier, W. S., Carrieri, A., and Lima, G. C. O. (2011), Apropriação dos saberes administrativos: Um olhar alternativo sobre o desenvolvimento da área. Revista de Administração da Mackenzie, 12(5), 43-67.

Jones, B. D. G. (2007), A history of historical research in marketing. In Baker, M. and Saren, M. (Eds.), Marketing theory: A student text (Chap. 3). DOI: 10.1177/0276146706290922.

Shapiro, S. J. (2006), The evolution of marketing thought: From ancient times to the 21st century. Journal of Macromarketing, 26(3), 193-213. https://doi.org/10.1177/0276146706290923.

Silva, E. T. Da S., and Bauer, A. P. M. (2018), Academia do comércio, Estado e legalização dos cursos superiores de administração. In V Congresso Brasileiro de Estudos Organizacionais (CBEO), Curitiba, PR, Brasil.

Comparing developments in market and transitional economies
- Introducing a periodization analysis to examine two contrasting country cases

Oksana Domina

Alla Starostina

Petteri Repo

Abstract

Established market economies have typically evolved through a gradual development of market practices that are aligned with consumer behavior and technological advancements. This has largely taken place during the period after the Second World War and the establishment of international financial system with the Bretton Woods Institutions and its subsequent developments (Kotler and Keller 2016; Homburg et al. 2013; Eichengreen 2019). Transitional economies, by contrast, are often characterized by haphazard development driven by urgent calls to adapt to new market dynamics as well as international political pressure (Belozyorov and Pisarenko 2015; Brown 2009; Diamond and Last 2003).

Attempts to make transitional economies convert quickly to established market economies have seldom been successful (Svejnar 2002; Williamson 1994). Challenges seem evident particularly if the economy is large and its industrial base slow to change. Nevertheless, even very small countries face challenges although these do not attract much attention. Behind the economic metrics of success, there are social concerns and social conflicts prompted by systemic change require attention (see Schultz et al. 2022). This emphasizes the importance of understanding both the economic and social consequences of market transformations, which is associated with the need for periodization for a comprehensive understanding of these dynamics.

To address this research gap, this ongoing study compares two contrasting cases of market development – the case of countries with established market economies and the quite different case of countries transitioning from a socialist socio-economic system to a market economy. While there are significant national differences in how the countries in each group have developed (Hall and Soskice 2001) or within the groups (Leszczyński 2015), we use the examples of two particular countries to explicate the variety in the development paths of market and the transitions economies: Finland and the Ukraine. Both Finland and the Ukraine have modernized, with the former reaching a coordinated market economy during the postwar period and the Ukraine more recently advancing in oligarchic or clientelistic capitalism (Hall and Soskice 2001; Drahokoupil and Myant 2015). Considering that direct comparisons between market and

transition economies easily lead to misleading conclusions, we develop and follow a periodization approach to compare the stages of market development in these two economies to account for comparative key developments according to criteria that cover of market relations, business environment, marketing practices, professional structures and education.

Our work applies a periodization system, which supports a comparison of the cases in spite of the developments taking place at different times (Starostina 2024). This method follows the macromarketing focus on broad socio-economic structures that shape markets, emphasizing the role of marketing in institutional transformation. Periodization further summarizes and structures market developments and thereby makes the chronological narrative more understandable (Hollander et al. 2005). We have identified three periodized market development stages and here focus on the second stage, which took place in Finland in the 1940-1980s and in Ukraine in the 2000-2010s. Table 1 summarizes observations according to key criteria of developments that took place after the preceding stage where market institutions began to take their early forms in both countries.

Table 1. The second stage of marketing development in Finland and Ukraine

Criteria	Finland (from the second half of the 1940s to the end of the 1980s)	Ukraine (from the beginning the millennium to the end of the 2010s)
Maturity of institutional relations	Steady progress in market dynamics is based on established economic practice and legislative framework.	Initial chaotic transition marked by aggressive privatization and the emergence of new market actors in the 1990s. Moderate stabilization over time through reforms and legal frameworks.
Variability and predictability of business environment	Increasing turbulence and unpredictability, intensified international competition, changes in	- First decade: increasing political instability culminating in a change of power following the "Revolution of Dignity."

	consumer behavior, deteriorating environmental and energy problems.	- Second decade: global economic recession due to the COVID-19 pandemic interrupting the recovery of the Ukrainian economy.
Development of marketing practices	Gradual complication of marketing practices reflecting the progressing market orientation and better awareness of consumer demand.	Early marketing practices heavily influenced by international models, quickly merged with increasing market requirements and competitive pressure.
Development of university education	Gradual integration of marketing into higher education curricula following international qualifications and practices.	Rapid development of marketing education after the 1990s, with the influx of international expertise and the creation of specialized marketing faculties and programs.
Availability of professional institutional structures	Growth of professional marketing organizations and ethical standards supporting a marketing community.	Emergence and evolution of marketing institutions in the 1990s with increasing influence on business practices and education.

Source: completed by the authors on the basis of Haavisto (2021), Starostina (2024, p. 29-33) and (UUME 2025).

The comparative analysis presented in Table 1 reflects the contrasting trajectories of marketing development in Finland and Ukraine during the respective periods. In Finland, market practices developed in conjunction to the recovery of Western Europe after the Second World War, with an emphasis on strengthening distribution of goods and their promotion as well as a gradual development of the consumer society. This period saw the rise of individualized advertising and market research, reflecting a maturing market economy in which marketing practices became integrated into business strategies.

In Ukraine, after the collapse of the Soviet Union, there was a rapid restructuring of the market system, which was marked by urgent calls to introduce market-oriented methods of conducting business. This period was characterized by the emergence of marketing departments in companies particularly promoting sales. In addition, significant efforts were made to develop marketing education according to international qualifications, reflecting a rapid and fundamental transformation that takes into account the country's integration into the globalized market economy. Sharp differences in the pace and character of development between the two countries highlight the significant influence of the socio-economic context on the adaptation and implementation of marketing practices.

In conclusion, this study shows that contrasting country cases of market development can be examined by relying on periodization criteria. An analysis of these developments and dynamics contributes to a deeper understanding of economic development in particular times and settings. While economic indicators can quantify growth and decline, accounting for institutional transformations and social change can give a more comprehensive understanding of societies undergoing significant market change. Our comparative findings, which are based on a periodization approach, further underscore the relevance of accounting for varying institutional setups and their impacts on economic and social outcomes.

References

Belozyorov, Sergei, and Pisarenko, Zhanna (2015), "Pension Reforms in Countries with Developed and Transitional Economies," *Ekonomika Regiona,* 2015(4), 158–169.

Brown, Archie (2009), *The Rise and Fall of Communism.* New York, NY: Vintage Books.

Diamond, Jared, and Last, David (2003), "Budget System Reform in Transitional Economies: The Case of the Former Yugoslav Republics," *IMF Working Paper,* 3(247), 1-.

Drahokoupil, Jan and Martin Myant (2015), "Putting comparative capitalisms research in its place: Varieties of capitalism in transition economies." In Matthias Ebenau, Ian Bruff & Christian May (eds.) *New directions in comparative capitalisms research: Critical and global perspectives,* 155-171.

Eichengreen, Barry (2019), *Globalizing capital: a history of the international monetary system* (Third edition.). Princeton University Press.

Hall, Peter A. and Soskice, David (2001), *Varieties of Capitalism: The Institutional Foundations of Comparative Advantage.* Oxford, UK: Oxford University Press.

Haavisto, Sara (2021), "Evolution of Marketing Thought and Practice - History of the Finnish Marketing Industry 1883–2020," *Aalto University Publication Series. BUSINESS+ECONOMY,* 5/2021. Retrieved August 21, 2022, from https://www.aaltoee.com/newsroom/2021/dba-dissertation-compiles-the-history-of-finnish-marketing-industry.

Hollander, Stanley, Rassuli, Kathleen M., and Jones, D. Geoffrey (2005), "Periodization in Marketing History," *Journal of Macromarketing,* 25(1), 32–41.

Homburg, Christian, Kuester, Sabine, and Krohmer, Harley (2013), *Marketing Management - A Contemporary Perspective.* New York, NY: McGraw-Hill.

Kotler, Philip, and Keller, Kevin L. (2016), *Marketing Management* (15th ed.). Upper Saddle River, NJ: Pearson Education, Inc.

Leszczyński, Dariusz (2015), "Emerging varieties of capitalism in transition countries: Literature review." *International Journal of Management and Economics* 48 (1), 101-124.

Schultz, Majken, Hatch, Mary Jo, and Larsen, Majken H. (2022), *The Expressive Organization: Linking Identity, Reputation, and the Corporate Brand.* Oxford, UK: Oxford University Press.

Starostina, Alla (2024), *Marketynh: Svitovyy dosvid ta ukrayins'kyy vymir [Marketing: World Experience and Ukrainian Dimension]* (pp. 29-33). Kyiv: Lira-K. Retrieved from https://omu.marketing/vyjshov-drukom-pidruchnyk-marketyng-svitovyj-dosvid-ta-ukrayinskyj-vymir-za-red-prof-starostinoyi-a-o/

Svejnar, Jan (2002), "Transition Economies: Performance and Challenges." *Journal of Economic Perspectives*, 16(1), 3–28.

Ukrainian Union of Marketing Experts, UUME (2024), Official website. Available at: https://omu.marketing/ (accessed January 24, 2024)

Williamson, John (1994), *The Political Economy of Policy Reform.* Washington, DC: Institute for International Economics.

Consumers' enjoyment as social symptoms of corporate violence and the foreclosure of politics of change

Renata Couto de Azevedo de Oliveira

Eduardo André Teixeira Ayrosa

Drawing on the concept of plateau of indifference (Ayrosa and Oliveira 2018) and the concept of interpassivity (Žižek 2010; Walz, Hingston, and Andéhn 2014; Cronin and Fitchett 2021) we argue that the consumers' reactions to the murder of Brian Thompson, United Healthcare's CEO, can be interpreted as social symptoms of the corporate institutionalization of objective, systemic violence (Žižek 2014). As such, these reactions are products of the dehumanization of consumers conducted by corporations that institutionalize violence (Varman and Al-Amoudi 2016; Varmand and Vijay 2018). While constituting a violent act, at the same time it temporally moves downwards a plateau of indifference, exposing in speech acts a kind of violence that was hindered by naturalization. In other words, it subjectifies objective violence. We further argue that, by cynically supporting the murderer online, consumers, as if they were in a game (Pfaller 2017), outsource the enjoyment of killing (in this case, the murderer of the CEO of UnitedHealthcare). Following a psychoanalytic framework, we posit that consumers' cynical enjoyment in this case accounts for a fantasy of participation (Dean, 2005), reflecting technological fetishism in times of communicative capitalism.

According to several publications, Thompson was heading to his hotel when he was shot. Shortly after the news about the crime emerged, UnitedHealtchcare consumers, along with the broader public, took the internet, inundating digital platforms with thousands of cynically supportive comments and "like" or even "heart" reactions about the event. Social platforms such as CNN's Instagram, UnitedHealthcare's LinkedIn and the New York Post's website had their comment sections converted into forums of humour and anti-capitalist criticism. According to Tolentino (2024), "The company (…) turned off comments on Facebook, where, as of midday Thursday, a post about Thompson had received more than thirty-six thousand "laugh" reactions". Other media followed this pattern and "reflected a fed-up America back to itself" (Kaufman 2024). On Saturday Night Live, during its "Weekly Update" sketch a comedian stated: "It really says something about America that a guy was murdered in cold blood and the two main reactions were 'Yeah, well healthcare stinks' and also 'Girl, that shooter hot'" (Kaufman 2024). In the vein of popular reactions to the crime, a look-alike contest for the alleged gunman, Luigi Mangione, was held in New York's Washington Square Park on the Saturday following Thompson's death.

The reactions to the murder have gained as much attention of media outlets as the event per se. Numerous articles published in the first week of December did not fail to state that although the

jokes were "classless" and "sick", they can also be seen as an opportunity to vent that Thompson's death has brought to thousands of people who are frustrated and dissatisfied with an ailing health system. We argue that these comments express a form of enjoyment based on the reprehensible and subjectively violent conduct of the CEO's murderer. It is a perverse delight, an enjoyment for millions of UHC consumers derived from the action of one single person: Luigi Mangione, the murderer. Interpassively, Mangione acted as if the UHC consumers who reacted on the internet. As Pfaller (2017, p.50) asserts, "You wish the other to do in your place what you yourself want to do", as if what happens in the parricide in Dostoyevsky's *The Bothers Karamazov*: you kill your father without having to actually kill him. UHC clients *enjoy* without having to hold the burden of actually killing by themselves.

Violence is normally understood as such through its subjective expressions, that is, those that are visible and can affect the physical body (e.g., murder, war) or individual property (e.g., robbery) (Žižek 2014, p. 17). However, there are also other forms of violence, less visible and not understood as such, but that do not cease to exist. These forms of violence are classified as objective (Žižek 2014, p. 17) and can assume symbolic expressions (associated with language as a means of essentialization, see Žižek 2014, p. 53) and systemic, the latter encompassing violence derived from the capitalist system and its developments. These forms of violence are interdependent, and violent events such as, for instance, gaslighting, were not previously understood as such.

This change is associated with what we call the plateau of indifference: "a level of objective violence below which any act becomes invisible or concealed behind a veil of naturalization" (Ayrosa and Oliveira 2018, p. 482). The plateau of indifference is raised by the dehumanization resulting from the objectively violent practices of North American health insurance companies. Among those practices are the unreasonable denial and delayed payment of claims, and prior authorization requests (Aswani and Shafer 2024). With the murder of UHC CEO, the plateau moved downwards, transforming naturalized (objective) violent practices of health-insurance organizations into subjective acts of violence, recognizable and identifiable by some media outlets and, most of all, by the consumers who have been affected by the violent corporate behaviour.

Following this logic, we understand that consumer reactions are directed at the violence perpetrated by health insurance companies in the US, which dehumanize people through their profit-driven practices. These violent capitalist practices remain unchecked (Varman and Al-Amoudi 2016) and are usually not understood as violent, especially in the field of Consumer Studies. Thus, by laughing at the murder of the UHC CEO, consumers force a downward movement of the plateau, exposing the violence present in practices of health insurance companies (e.g., denying treatment).

The quote “When the rich rob the poor, it’s called business. When the poor fight back it’s called violence” encapsulates quite well the objective and subjective forms of violence.

Additionally, we conceptualize this event through the lens of interpassivity, which highlights the delegation of responsibility to another subject or object (Cronin and Fitchett 2021). In this context, we take consumer reactions as an expression of enjoyment, wherein accountability is exclusively attributed to Luigi Mangione, who was indicted for murder. By being absolved of any direct responsibility for the crime, consumers experience a form of vicarious pleasure that aligns with what Walz et al. (2014) describe as “a thievish joy.” The enjoyment produced by the killing is actualized in ironic, sardonic comments, violent by themselves in a different fashion. Physical violence is, then, dislocated to verbal violence. UHC clients enjoy, this way with sardonic humor, similar as it was described by Freud ([1905] 1960) in his workings of jokes and the release of libido, thus exposing a form of violence that, otherwise, would remain naturalized.

Nonetheless, it is worth noting that many of the consumer reactions took place in a virtual environment, through comment sections and reaction buttons on social networks, in addition to countless memes that still circulate. In these cases, we consider it important to bring to the discussion the idea that in times of communicative capitalism (Dean 2005) the technological fetish makes consumers believe that "they are active, maybe even that they are making a difference simply by clicking on a button" (Dean 2005, p. 60). The technological fetish prevents actual action, thus allowing the foreclosure of politics of change. Consumers’ enjoyment through ‘clapping’ and ‘like’ buttons are poor substitutes that allow the illusion of participation in it, excluding the true possibility of organizing against corporate violence.

References

Aswani, Monica S. and Shafer, Paul. (2024) *5 of the most frustrating health insurer tactics and why they exist*. Retrived from https://theconversation.com/5-of-the-most-frustrating-health-insurer-tactics-and-why-they-exist-245929

Ayrosa, Eduardo A. T. and Oliveira, Renata C. de A. de. (2018) “Marketing and the Production of Consumers’ Objective Violence” In Mark Tadajewski, Matthew Higgins, Janice Denegri-Knott and Rohit Varman (Eds.*), The Routledge Companion To Critical Marketing* (pp.482-499) London: Routledge.

Cronin, James and Fitchett, James (2021), “Lunch of the last human: Nutritionally complete food and the fantasies of market-based progress”, *Marketing Theory*, 21(1), 3-24.

Dean, Jodi (2005) Communicative Capitalism: Circulation and The Foreclosure of Politics. *Cultural Politics*, 1(1), 51-74.

Freud, S. (1960). *The Standard Edition of the Complete Psychological Works of Sigmund Freud* (Vol. 8). London: Hogarth Press.

Kaufman, Anna (2024), "SNL leans into jokes after United Healthcare CEO killing: 'The guy just bicycled away'", *USA Today*. Retrieved from https://www.usatoday.com/story/entertainment/tv/2024/12/09/snl-unitedhealthcare-ceo-death-jokes/76858269007/

Pfaller, R. (2017). *Interpassivity: The aesthetics of delegated enjoyment*. Edinburgh University Press.

Tolentino, J. (2024), "A man was murdered in cold blood and we are laughing? What the death of a health-insurance CEO means to America", *The New Yorker*. Retrieved from https://www.newyorker.com/news/the-lede/what-the-murder-of-the-unitedhealthcare-ceo-brian-thompson-means-to-america.

Varman, Rohit and Al-Amoudi, Ismael (2016), "Accumulation through derealization: How corporate violence remains unchecked", *Human Relations*, *69*(10), 1909-1935.

Varman, Rohit and Vijay, Devi (2018), "Dispossessing vulnerable consumers: Derealization, desubjectification, and violence", *Marketing Theory*, *18*(3), 307-326.

Walz, Markus, Hingston, Sean and Andéhn, Mikael (2014), "The magic of ethical brands: Interpassivity and the thievish joy of delegated consumption", *ephemera: theory & politics in organization*, 14(1), 57-80.

Žižek, Slavoj (2010), *Como ler Lacan*. Rio de Janeiro: Zahar.

Žižek, Slavoj (2014), *Violência: Seis Reflexões Laterais*. São Paulo: Boitempo.

Consuming Otherness: The Anthropophage in Marketing

Cannibalism alone unites us all. Socially. Economically. Philosophically. […] I am only concerned with what is not mine. Law of Man. Law of the cannibal.

(Oswald de Andrade 1928)

Victoria Rodner

Chloe Preece

Feeding off the Other - metaphorically speaking - is nothing new. The commodification of 'Otherness' is big business (hooks 1992) and throughout history we have witnessed the consumption, appropriation and hybridisation of culture in the pursuit of one's own embellishment, legitimacy, or perceived superiority (Bhabha 1994). In metaphoric terms, consuming Otherness implies the navigation of boundaries or straddling of identities (Piertse 2001), between the self and the Other, and in marketing and consumer research we have witnessed rich and varied accounts of how we 'take' from Others, for instance with the appropriation of culture to 'spice up' a market offering (Askergaard and Eckhardt 2012; Coskuner-Balli and Ertimur 2017; Cruz et al. 2024); or the mimicry of 'dominant' culture (i.e. language, organisational praxis, theories, knowledge systems) in an attempt to catch up to the hegemon (Varman and Saha 2009; Hemais et al. 2022; Jafari 2022); or the blending of cultures through hybridisation, creolization, and syncretism (Wang and Yeh 2005); or even the profitable act of 'self-othering' when commercialising one's own ethnicity (Iwabuchi 2000; Zanette et al. 2021).

Feeding off the Other - in literal terms - is inherently more gruesome (morbid even) as it implies the monstrous act of cannibalism or eating human flesh that was allegedly practised centuries ago by indigenous peoples in faraway lands (Vilaça 1998). In this act of cannibalisation, people as Others are transformed into instrumental objects and sources of nourishment (Rehn and Borgerson 2005). Ingestion via cannibalism implies the most visceral boundary transgression – a self-other fusion – as there is a negotiation between subject and object, thus invoking the abject (Rehn and Borgerson 2005). As such cannibalism implies a navigation of boundaries through a ritualistic 'predatory subjectivity' and subsequent absorption of the Other (Islam 2012a, p. 174). Although highly debated among scholars who question the veracity of historical accounts of cannibalistic tribes (Arens 1979), this social taboo has served as a potent European

myth used to demonise the Other (Islam 2012a), a myth that clearly benefited the colonizer economically. In colonial discourse, the accusation of cannibalism was a way to distinguish the barbaric and primitive 'them' from the civilized 'us' (hooks 1992) thus aiding the justification for slavery, conquest, and imperialism (Mignolo 2011).

Theorising 'Otherness' - and how we might assimilate Other's otherness in metaphoric or literal terms - is deeply rooted in coloniality, which critiques the 'persistent legacies' and 'long standing patterns of power' that emerged from (and outlived) colonialism as an epoch (Maldonado-Torres 2007, p. 243). As such, consuming 'Otherness' revolves around (asymmetric) power dynamics and perpetuating tropes of them versus us, modern versus backward, progressive versus primitive (**Sandikci 2022**). Embedded in this dichotomous Othering lies a 'coloniality of Being': an ontological differencing between the (Western) self and the (non-Western) Other (Mignolo 2011; Hemais et al. 2022), where 'the former is seen as having human rights, while the latter is violently invisibilised and dehumanised' to the point of becoming exempt from 'the order of Being' (Maldonado-Torres 2007, p. 257). An illustration of this dehumanising is brought to life when the *conquistadores* debated whether Amerindians of the New World had souls or not (Quijano 2000; Maldonado-Torres 2007).

Despite its dark origins, and darker associations, cannibalism can have a positive twist if we look beyond Western tropes. Anthropophagy was heralded in the global periphery for its capacity to 'devour' Western thought and practice to make it their own (Islam 2012a). Like cannibalism, anthropophagy centres on a powerful notion of corporeal assimilation (Rehn and Borgerson 2005) yet it opens up a third space between a self-Other dyad (Bhabha 1994), foregrounding an in-between-ness (Islam 2012a). As such, anthropophagy as a lens helps further our understanding of boundaries, of how other's Otherness as well as our own becomes assimilated and hybridised (Wood and Caldas 1998). The anthropophage, within this non-Western thinking, challenges a subversive position of Otherness, becoming emancipated in its state of being in between self-and-Other so that rather than self-negating the cannibal regains ontological legitimacy and a new 'order of Being' (cf. Maldonado-Torres 2007). In its indiscriminate consumption, from itself and Others, the anthropophage breaks the shackles of a 'long-lasting European Cartesian paradigm of a superior Self and inferior Other' (Hemais et al. 2022), thus saving itself from dehumanization and a self-imposed coloniality.

In this conceptual piece, we draw from decolonial theories and epistemologies (of being) from the Global South to further our understanding of Othering and boundary transgression

within marketing theory. Using Brazil's fastest growing Pentecostal church as an illustrative case of anthropophagy in action, we explore how this organisation 'feasts' off the Other in highly lucrative and creative ways, not least from seemingly incompatible (religious) sources. The Universal Church of the Kingdom of God, and its HQ the Temple of Solomon in São Paulo, has positioned itself at the top of the ecclesiastical food chain by indiscriminately taking from centre *and* periphery, from above and below, from Others and itself, and in doing so generates a unique offering that is both familiar yet distinct (Wang and Yeh 2005). By focusing on the Temple, we witness how the Church appropriates from Others in two distinct ways. Firstly, by mimicking iconography and symbols from a more established tradition, Judaism, in an effort to confer historical credibility onto the young church. And secondly, by appropriating a cosmology of spirit possession from local Afro-Brazilian polytheistic faiths, although the church vilifies this very practice as a means of driving out 'evil' from its congregation. Using the Temple as an empirical illustration of consuming Otherness, we aim to bring anthropophagy into our marketing and consumer research lexicon. By locating our study within the body of work of Othering and synthesising these previous conceptualisations on self-Other boundary transgression we dimensionalise the *who*, *what*, *why* and *how* of consuming Otherness (**Appendix A**).

As a form of hybridity, anthropophagy affords new ways of thinking about Othering. Where the importance of hybridity lay in its problematising of boundaries (Piertse 2001) and inequalities (Ger et al. 2018), anthropophagy takes us a step further as boundaries become dissolved in the ingestion of the Other. Moreover, it implies a continuous ingestion and digestion of competing cultural elements (Viveiros de Castro 2014), so that the final product is not a homogenous, global product but one that is fluid and keeps shape shifting to new circumstances. 'In an age of multicultural mixture and self-conscious identity', Islam (2012b) sees anthropophagy as the 'middle road between the extremes of cultural essentialism and isolation and cultural assimilation and homogeneity' (p. 277). We see then how the Temple's feeding off the other is a form of perpetual transformation, of identity formation not self-deprecation, so that through anthropophagy it ingests but never fully becomes the Other (Islam 2012a), and nourishment from 'the Other provides life-sustaining alternative' (hooks 1992, p. 369).

Indeed, Brazil has a longstanding relationship with anthropophagy, both conceptually and historically. From the alleged cannibalistic Wari and Tupy tribes that confronted the Portuguese colonizers in the 16th century (Wood and Caldas 1998) to the avant-garde movement some four centuries later (Islam 2012a), anthropophagy has played a key role in shaping Brazilian identity.

From colonialist taboo, modernist poet Oswald de Andrade pioneered the thought of cannibalism of other cultures in his *Anthropophagic Manifesto* of 1928. Andrade championed anthropophagy as an empowering way for the country to assert itself against European postcolonial cultural domination (Islam 2014) so that he denounced the, until then, blind mimicry of Western cultural, artistic and literary trends, suggesting instead a 'shameless appropriation of foreign ideas [which should be] devoured after seasoning with new meanings to suit local tastes' (Wood and Caldas 1998, p. 15). Rather than a transculturation (Bhabha 1994), anthropophagy offers a 'transvalorization', capable of 'appropriation and of expropriation, of deconstruction' of the Other for self-gain (Campos 2007, p. 160). Unlike accounts of commodification of ethnicities (Ger et al. 2018), where the subject's difference from ourselves is both 'disdained and eulogized' (Zanette et al. 2021, p. 134), the anthrophage acknowledges the Other, its strengths and desirable qualities, which it unapologetically then makes its own.

Building on more optimistic accounts of cannibalism in management studies (Wood and Caldas 1998) as well as marketing (Zanette et al. 2021; Rehn and Borgerson 2005) we aim to flesh out how boundaries are less demarcated and 'tidy' than once thought (Rehn and Borgerson 2005; hooks 1992; Cruz et al. 2024). In this conceptual piece and using the Temple as empirical illustration, we bring the anthropophage into marketing, focusing as we do on the strategies and power dynamics at play in 'eating the Other' within the context of a busy religious marketplace. This anthropophagic lens affords a more granular process of consuming Otherness that goes beyond the dichotomous centre-periphery trope and self-Other boundaries, whereby the anthropophage blurs these lines and feeds off a multiplicity of sources, taking from above and below, from self and Other.

Previous analogies of cannibalism in marketing and branding have tended to centre on a bleak premise of 'demise, loss or waste' (Rehn and Borgerson 2005), whereby sources of nourishment are finite and once consumed cease to exist; for instance when a new (extended) brand can 'eats' the sales of an existing one of the same firm (Aaker and Keller 1990) or when retailers convert consumers to private labels via copycat packaging of established brands (Harvey et al. 1998). Instead, anthropophagy as a theoretical lens, cultural movement, or monstrous act, necessitates the Other as a source of continual nourishment and in its consumption neither self-negates nor negates the Other. By blurring the boundaries between self-Other, and between hegemonic and marginalised (religious) Others, the Temple strengthens rather than dilutes its own hybrid identity and religious offering. In the wake of rich theorising on consuming cultural

difference, we believe that anthropophagy allows for novel theorising about boundaries and boundary transgression, in that it (1) affords new ways of understanding the porosity between self-Other; (2) questions binaries of Being; and (3) problematises prevalent self-Other power dynamics and asymmetry.

References

Aaker, David A., and Kevin L. Keller (1990), "Consumer Evaluations of Brand Extensions," Journal of Marketing, 54(1), 27–41.

Arens, William (1979), The man-eating myth: anthropology and anthropophagy. New York: Oxford University Press.

Askergaard, Soren, and Giana Eckhardt (2012), "Glocal yoga: Re-appropriation in the Indian consumptionscape," Marketing Theory, 12 (1), 45-60.

Bhabha, Homi (1994), The Location of Culture, London: Routledge.

Campos, Haroldo de (2007), "Anthropophagous Reason: Dialogue and Difference in Brazilian Culture", p. 157-177, in Haroldo de Campos, Novas. Selected Writings. (eds) Antonio Sergio Bessa and Odile Cisneros. Evanston, IL: Northwestern University Press.

Coskuner-Balli, Gokcen and Burçak Ertimur (2017), "Legitimation of hybrid cultural products: The case of American Yoga," Marketing Theory, 17 (2), 127-147.

Cruz, Angela Gracia B., Yuri Seo, and Daiana Scaraboto (2024), "Between Cultural Appreciation and Cultural Appropriation: Self-Authorizing the Consumption of Cultural Difference," Journal of Consumer Research, 50.

Ger, Güliz, Eminegul Karababa, Alev Kuruoglu, Meltem Türe, Tuba Üstüner, and Baskin Yenicioglu (2018) "Debunking the Myths of Global Consumer Culture Literature," The SAGE Handbook of Consumer Culture, pp. 79- 99.

Harvey, Michael, James Rothe, and Laurie Lucas (1998), "The 'Trade Dress' Controversy: A Case of Strategic Cross-brand Cannibalization," Journal of Marketing Theory and Practice, 6(2), 1-1

Hemais, Marcus W., Luis A. Pessôa, and Denise Barros (2022), "The "Esperanto" of business … or how to be successful in life: A decolonial reading, using semiotics, of English language courses' advertisements in Brazil," Marketing Theory, 22(2), 251-274.

hooks, bell (1992), "Eating the Other: Desire and Resistance," in *Black Looks: Race and Representatio*n, Boston: South End Press, 21-39.

Islam, Gazi (2012a), "Can the Subaltern Eat? Anthropophagic Culture as a Brazilian Lens on Post-

colonial Theory," Organization *19* (2), 159-180.

Islam, Gazi (2012b) "Between unity and diversity: historical and cultural foundations of Brazilian management," European Journal International Management, 6 (3), 265-282.

Islam, Gazi (2014), "Appropriating the Abject: An Anthropophagic Approach to Organizational Diversity," Equality, Diversity and Inclusion: an International Journal, *33* (7), 595–613.

Iwabuchi, Koichi (2000), "Complicit exoticism: Japan and its Other," The International Journal of Urban Labour and Leisure 2(2): article 4.

Jafari, Ali (2022), "The role of institutions in non-Western contexts in reinforcing West-centric knowledge hierarchies: Towards more self-reflexivity in marketing and consumer research," Marketing Theory, *22*(2), 211-227.

Maldonado-Torres, Nelson (2007) "On the Coloniality of Being," Cultural Studies, 21(2-3): 240-270.

Mignolo, Walter D. (2011) "Geopolitics of sensing and knowing: on (de)coloniality, border thinking and epistemic disobedience," Postcolonial Studies, 14(3), 273-283

Piertse, Nederveen JP. (2001), "Hybridity, So What? The Anti-hybridity Backlash and the Riddles of Recognition", Theory, Culture & Society, 18 (2/3), 219-245.

Quijano, Anibal (2000), "Coloniality of Power, Eurocentrism, and Latin America," Nepantla: Views from South, 1(3), 533-80

Rehn, Alf, and Janet Borgerson (2005), "Is there a cannibal in organization studies? Notes on anthropophagy and organization (recipe included)," Culture and Organization, *11* (2). 69-81.

Varman, Rohit and Saha, Biswatosh (2009), "Disciplining the discipline: Understanding postcolonial epistemic ideology in marketing," Journal of Marketing Management, 25(7/8), 811–824.

Vilaça, Aparecida M. N. (1998), "Fazendo Corpos: Reflexões sobre Morte e Canibalismo entre os Wari' à Luz do Perspectivismo," Revista Brasileira de Antropologia, 41 (1), 9–67.

Castro, Eduardo (2014), Cannibal Metaphysics, edited and translated by Peter Skafish University of Minnesota Press, Univocal Publishing

Wang, Gerogette and Emilie Yueh-Yu Yeh (2005), "Globalization and hybridization in cultural products: The cases of Mulan and Crouching Tiger, Hidden Dragon," International Journal of Cultural Studies, 8(2), 175-193.

Wood, Thomaz Jr. and Miguel P. Caldas (1998), "Antropofagia Organizacional," Organização,

Recursos Humanos e Planejamento - Revista de Administração de Empresas, 38 (4), 6-17.

Zanette, Maria Caroline et al. (2021), "Eating one's own otherness: When producers commercialize their ethnicities," Journal of Business Research, 129, pp. 134-144.

Appendix A – A taxonomy of consuming 'Otherness'

	Cultural Appropriation	Mimicry	Self-cannibalisation	Hybridity	Anthropophagy
WHO is consuming	Dominant (Western) culture consumes from 'foreign', marginalised Other	The peripheral 'rest' takes from the dominant West	Eating oneself; periphery self-othering	The 'colonised' feeds from 'colonizer'; blending of elements (syncretism in religion + creolisation of language)	As a form of hybridity, the peripheral consumes indiscriminately from above and below food chain, devouring the 'Other' and one-self
WHAT is being consumed	Cultural expressions (including music, fashion, aesthetics), religious practices, rituals, symbolism,	Discourse and practice of hegemonic culture; knowledgescapes; consumer behaviour; English as *lingua franca*	Stereotyped cultural elements favoured by the dominant (West)	Selective mixing of cultural products seen as desirable from the 'Other' with own culture	Iconography, rituals/ behaviours, epistemologies / cosmologies (w/in religion), cultural elements (art, literature, music) from centre and periphery
WHY consumption improves offering	Add 'spice' to mainstream, (white) culture	Resemble and defy the hegemon; playing catch up in pursuit to become a global contender	Spice up local offering without having to draw on foreign sources	To create a hybrid mongrel; hybridity as an in-between-ness	To ingest the desirable features of the 'Other' to make their own; to be different yet familiar
HOW is the Other consumed	Decontextualise and reconfigure; superficially adopting aesthetic elements; rituals stripped of meaning	Replicating the format of Western discourse and practice in their own country; imitation	Apply an imperialist gaze on themselves; romancing one's own ethnicity for capital gain	Boundaries seen as porous; meanings become localised	Acknowledge rival's strength; fluid form of nourishment; adapts characteristic features as it consumes
Examples	Dreadlocks in fashion; Yoga as lifestyle & exercise; religious elements used for aesthetics; international K-pop fans appropriate Korean words & slang	Business schools and shopping malls in the global south imitate US models; scholars in Global South publish in English and in leading (English) journals	Packaging of Amazonian cuisine as 'exotic'; cherry-blossoms as branding Japan; stereotyping the Irish pub	Creole languages of Caribbean; fusion of cinematic genres (eg. Bollywood); pagan symbols used in Christianity; American yoga as cultural hybrid	Brazilian Modernist movement (in art, theory, literature, poetry) Brazilian management styles; The Temple of Solomon

Consumption as a Way to Retain Lost Identities: New Forms of Wine Consumption Among Generation Z Consumers in Greece

Zoi Liakou

Mahsa Ghaffari

Greek wine consumption patterns have changed significantly over the last five years, particularly among Generation Z (Santorinaios et al., 2023). Rather than consuming wine primarily for intoxication, they engage with it on a deeper level, incorporating cultural nostalgia and reconfiguring social and cultural capital (Schiele & Venkatesh, 2016). This phenomenon is intertwined with the portrayal of Greece on the global stage as a nation in decline, where its people are often perceived as lacking the success, diligence, and intellectual influence that once defined their historical legacy (Karagiannis, 2020). Using social identity theory (Shrum et al., 2013), digital platforms (Davis, Love & Fares, 2019), and nostalgic consumption (Bi, Pang, Chen & Perkins, 2024), this study examines how Greek consumers use wine to reconstruct their social identities online. Through qualitative research, including seven in-depth interviews with Greek Generation Z wine consumers and netnographic observations of Instagram, this study identified four themes: *online narratives, wine consumption as a social/cultural currency, culturally rooted consumption, and the dilemma of cultural reclamation versus performative consumption.* The findings underscore that Greek Generation Z's wine consumption is driven by both national pride and global social media influence, leading them to reclaim cultural capital through consumption, as understood within Bourdieu's framework (Bourdieu, 1984). Consuming wine not only to differentiate themselves from peers and older generations but also to honour their ancestral legacy. Influenced by social media, many view wine appreciations as a means of constructing a sophisticated and cultured identity—one that is elegant, refined, and exclusive, as portrayed online. Wine is perceived as a luxury product, with its status reinforced by foreign cultural narratives introduced through social media. Beyond its stylish image, they are drawn to the knowledge and rituals surrounding wine. The way people discuss wine fascinates them, encouraging attendance at tastings and exploration of local Greek varieties. This appeal is heightened by the fact that Greek wines are not widely known internationally, making their discovery feel unique and special. Their interest in Greek wine is also closely tied to national pride. Many believe that by choosing local wines, they support the Greek economy, turning their wine appreciation into a meaningful contribution to their country. Opting for indigenous Greek wine varieties over well-known international brands is not just a matter of preference; it reflects a deep

sense of patriotism and a desire to support the Greek economy. This choice is also tied to respect for ancestral heritage and represents a connection to cultural capital. Greek Generation Z's preference for indigenous wine varieties over widely produced international wines, even those grown on Greek soil (Sykalia et al., 2023), reflects a broader desire for authenticity and exclusivity, as local varieties are less popular and more unique. Their choice is also driven by patriotism and a subconscious desire to support the Greek economy, as many young Greeks feel disappointed by the country's financial struggles and seek to contribute to its recovery while differentiating themselves from previous generations. Greek Generation Z consumers seek authenticity in their wine choices while engaging with global aesthetic trends. Instagram posts featuring wine drinking in aesthetic settings, candlelit tastings, and visits to rustic vineyards reflect global lifestyle trends. These practices raise questions about the authenticity of their cultural engagement—whether their actions constitute a genuine connection to tradition or are simply part of an aesthetic consumption cycle that emphasises style over substance. Overall, this study contributes to the literature on identity construction, social identity theory, and cultural capital by demonstrating how ideologies and unfulfilled desires can be reflected on new forms of consumption (Schmitt, Brakus, and Biraglia, 2022), and how Generation Z in Greece engages in wine consumption as a means of negotiating and reclaiming cultural identity. While previous research has explored the role of consumption in shaping social status (Bourdieu, 1984) and nostalgic engagement (Bi et al., 2024), this study highlights how digital platforms amplify these dynamics, blending global aesthetic trends with local cultural expressions. By integrating insights from consumer culture theory (Arnould, and Thompson, 2005; Joy, and Li, 2012) and digital identity formation, the research helps us understand how young consumers use wine as both a social marker and a tool for cultural reclamation in an era of globalisation. The findings have practical implications for the wine industry, marketers, cultural analysts, and policymakers. Given Generation Z's strong interest in learning and storytelling, wineries could position themselves as educational hubs, offering experiences that deepen consumers' understanding of Greek wine culture. Additionally, as this demographic values tradition, history, and authenticity, wine brands should integrate narratives about their heritage and traditional winemaking methods into their marketing strategies. However, as aesthetic appeal remains crucial, these efforts must be visually compelling and aligned with the elegant and aspirational imagery that resonates with young consumers.

References

Arnould, E. J., & Thompson, C. J. (2005). Consumer culture theory (CCT): Twenty years of research. *Journal of consumer research*, *31*(4), 868-882.

Bi, S., Pang, J., Chen, H., & Perkins, A. (2024). When feeling powerless, we crave nostalgia: The impact of powerlessness on the preference for nostalgic products. *Journal of the Academy of Marketing Science*, *52*(4), 998-1017.

Bordieu, P. (1984). *Distinction – A social critique of the judgment of taste*. Routledge.

Joy, A., & Li, E. P. H. (2012). Studying consumption behaviour through multiple lenses: an overview of consumer culture theory. *Journal of Business Anthropology*, *1*(1), 141-173.Karagiannis, E. (2020, November 16). *The silent rise of Greece as a Mediterranean power*. The Royal United Services Institute. https://rusi.org/explore-our-research/publications/commentary/silent-rise-greece-mediterranean-power

Koo, M., & Shavitt, S. (2010). *Cross-cultural psychology of consumer behavior*. In J. N. Sheth & N. K. Malhotra (Eds.), Wiley international encyclopedia of marketing online. John Wiley & Sons Ltd.

Santorinaios, A., Kosma, I. S., & Skalkos, D. (2023). Consumers' Motives on Wine Tourism in Greece in the Post-COVID-19 Era. *Sustainability*, *15*(23), 16225.

Schiele, K., & Venkatesh, A. (2016). Regaining control through reclamation: how consumption subcultures preserve meaning and group identity after commodification. *Consumption Markets & Culture*, *19*(5), 427-450.

Schmitt, B., Brakus, J. J., & Biraglia, A. (2022). Consumption ideology. *Journal of Consumer Research*, *49*(1), 74-95.

Shrum, L. J., Wong, N., Arif, F., Chugani, S. K., Gunz, A., Lowrey, T. M., ... & Sundie, J. (2013). Reconceptualizing materialism as identity goal pursuits: Functions, processes, and consequences. *Journal of Business Research*, *66*(8), 1179-1185.

Shrum, L., Wong, N., Arif, F., Chugani, S. K., Gunz, A., Lowrey, T. M., Nairn, A., Pandelaere, M., Ross, S. M., Ruvio, A., Scott, K., & Sundie, J. (2013). *Reconceptualizing materialism as identity goal pursuits: Functions, processes, and consequences*. Journal of Business Research, 66(8), 1179–1185. https://doi.org/10.1016/j.jbusres.2012.08.010

Spence, C. (2020). *Wine psychology: Basic & applied*. Cognitive Research: Principles and Implications, 5(1). https://doi.org/10.1186/s41235-020-00225-6

Sykalia, D., Chrisostomidou, Y., & Karabagias, I. K. (2023). *An exploratory research regarding Greek consumers' behavior on wine and wineries' character*. Beverages, 9(2), 43. https://doi.org/10.3390/beverages9020043

Consumption, perceptions and expectations: a comparative analysis of Brazilian national teams fans

Ana Cristina Picinin de Rezende Costa

Abstract

Fans of the most popular sport in the world in the "country of football" are little known, especially for the Brazilian football national teams. Studies on fans of the Brazilian men's team are rare and almost non-existent regarding the women's team. We interviewed 16 professionals who directly impact the Brazilian fan experience with different profiles: from managers to athletes. We also conducted three focus groups with fans to understand their relationship with the Brazilian teams based on their connections with idols, titles in major championships, experience in the stadium and media, and expectations for the future. The results revealed fans were disappointed with the men's team, especially due to the distance from the idol, lack of recent titles, and excessive commercialization of the sport while having positive expectations for the women's team considered a recent phenomenon capable of offering a new dimension of football by following an alternative development path. This exploratory research provides critical insights based on decolonial thought (Dussel 2000; Mignolo 2007) and theories of neoliberalism (Banett-Weiser 2018; Dúménil and Levy 2011) for football managers of the next country hosting the 2027 FIFA Women's World Cup interested in listening to fans to make the sport more attractive, especially for future generations who, according to participants, lose interest in football in the face of more diverse entertainment options.

1. Introduction

"There is a different logic in women's football. The relationships are different. There's more joy. People are going to the stadium to enjoy the game, not fight."

As this fan's declaration, which is part of the primary data of this study, reflects, there seems to be a different sentiment attached to women's football (WF), and this is corroborated by existing literature that explores the converging and diverging worlds of women's and men's football (MF) fans.

Studies reveal that fans of both share motivations, such as the desire for entertainment, social engagement, and appreciation for good on-field performance (Clarke, Geurin et al. 2022; Mazzei 2020; Rocco 2012). However, the context and perceptions differ significantly. Fans of WF,

particularly Gen Z, value the game's perceived authenticity and honesty, often seeing it as a rejection of the hegemonic masculine environment associated with the men's game. WF fans also highlight the greater accessibility and relatability of the players (Antonowicz et al. 2020; Cere 2002; Crawford and Gosling 2004; Jones 2008; Sveinson and Hoeber 2016; Schallhorn 2023; Simmers 2023). Conversely, fans of MF engage more deeply with aspects of rivalry and cultural identity tied to their teams (Dunn 2016; Pitti 2019), a tradition that is being challenged by Gen Z who is less likely to adhere to gender stereotypes and more open to diverse forms of participation in sport (Dixon 2015). Finally, MF fans often express a desire for authenticity and team connection that is not being delivered by the growing commercialisation of the sport (Dixon 2015; Dubal 2010).

This difference in the perception of the game is not only shaped by gender, personal values and experiences of individual fans. Still, it is also influenced by the distinct cultural and historical contexts. In Brazil, football's history is deeply rooted in hegemonic masculinity, with the men's team having one of the most lauded histories in MF, being a five-time champion in FIFA World Cups (Prates 2024) and accumulating seven Olympic medals, two of which are gold (Molina 2024). Therefore, the men's national team serves as a long-standing symbol of national pride. At the same time, their female counterparts - who do not have a gold medal in FIFA World Cups but one silver and another bronze medal (Zalcman 2023) besides three silver and three bronze medals in the Olympic Games (Perissé 2024) - are objects of marginalisation (Gastaldo 2005; Helal 2007).

Building upon this understanding of the challenges facing MF and the potential of the women's game, this study investigated the connections, perceptions, and expectations of Brazilian national team fans. This is explored by two key questions: 1) How is Brazilian football fandom addressed to their national teams? and, 2) What are the differences and similarities between Brazilian women's and men's national team fans?

Thematic analysis of 16 interviews with stakeholders of Brazilian football and 3 focus groups with fans, guided by a critical framework that encompasses decolonial thought (Dussel 2000; Mignolo 2007) and theories of neoliberalism (Banett-Weiser 2018; Dúménil and Levy 2011), were used to answer these questions. Results revealed that fans are disappointed with the influences of globalisation, neoliberalism, and neocolonialism in the men's game while excited by features of the women's game, such as fostering a more equitable and sustainable football culture.

The study addresses a gap in the existing literature, which has often overlooked the

Brazilian context, their national teams and the experiences of women fans (Pfister et al. 2013; Pitti 2019). By understanding both, and how different groups engage with the sport (Clarke, Geurin et al. 2022; Sveinson 2015), this research can help to inform strategies to mobilise support across a vast and diverse nation and create a more authentic, inclusive, and engaging experience for all. In addition, studies that include perspectives from Brazil, which will host the upcoming FIFAWWC27, present a unique opportunity to overcome current obstacles of the football landscape, recognise the potential of WF to foster alternative fan cultures (Guest 2018; Schallhorn 2023) that are perceived to be less toxic (Allison 2022, Schallhorn 2023) and more authentic (Delia 2020; Schallhorn 2023). Finally, it is also particularly relevant in light of concerns around commercialisation and alienation in the men's game (Dubal 2010; Numerato 2015) that turn football less appealing to younger generations.

2. Theoretical framework

The theoretical framework of this study was conceived following data assessment, where Brazilian fans identified that their experiences were primarily influenced by three interconnected hegemonies: Eurocentrism, Masculinity, and Globalisation. To address these hegemonic influences, a decolonial critical analysis was conducted, drawing on Mignolo's (2007) work on the Coloniality of Power and de-colonial thinking, Dussel's (2000) analysis of Eurocentrism, Duménil and Lévy's (2011) exploration of the Neoliberal Crisis, and Banet-Weiser's (2012, 2015, 2018) concept of gendered economies of visibility. These four axes provide a framework for understanding how fans experience their national teams and what expectations they hold for the future of football.

In this sense, Mignolo's (2007) concept of the Coloniality of Power and Dussel's (2000) analysis of Eurocentrism help to elucidate the Eurocentric nature of the Brazilian game. This framework will allow us to examine how European powers continue to dominate global football through colonial power structures that replicate an unequal system, where resources are extracted from the Global South to benefit the Global North (Bar-On 2019; Rozo 2024). This framework is also useful for looking over the growing alienation of fans from male players who move to Europe at a young age, a key concern for fans rooted in a desire to see a more authentic version of the game and closer ties with their teams.

2.1 Coloniality of Power and Decolonial Thinking

Mignolo (2007) introduces a decolonial perspective, arguing that modernity and coloniality are intertwined and continue to shape power dynamics, including economy, knowledge, and subjectivity. He challenges Eurocentric views, proposing a pluri-versal epistemology that acknowledges diverse experiences beyond a singular European narrative (Castro-Gómez 2001; Quijano 2000; Saldívar 2007; Tlostanova 2003), and advocating for border thinking to challenge these existing power structures. This lens is particularly relevant to the football landscape, revealing how the global system is deeply rooted in historical colonial power structures, where European powers maintain dominance through mechanisms such as the exploitation of talent and a global division of labour (Bar-On 2019; Rozo 2024). These dynamics demonstrate how traditions can mask coloniality, and how football acts as both a tool for neocolonisation by using economic and political pressure by a powerful country to control or influence another country, and a site of resistance (Pizarro et. al 2020), enabling fans to critique these systems and consider alternative forms of engagement. Furthermore, this decolonial perspective highlights how globalisation is not a neutral process but is often used to perpetuate Eurocentric norms, further reinforcing the dominance of European powers (Pizarro et. al 2020; Rozo 2024; Vasconcellos 2009). Indeed, the expansion of neoliberal policies and practices should be understood as part of this wider global process, where the drive for free markets, privatisation, and commodification often intersects with existing colonial power structures, further complicating the landscape of power within football.

2.2 Eurocentrism

Dussel (2000) further highlights the problem of Eurocentrism by challenging the concept of "Europe" as the centre of modernity, revealing how this ideology marginalises non-European experiences and conceals the violence of colonial history. This view, which establishes a global hierarchy, is a key factor in shaping the dominant discourse of football (Rozo 2024; Vasconcellos 2009), creating a system where European leagues are presented as superior, while other football cultures are devalued (Pizarro et. al 2020). This dominance is further manifested in how the sport is structured, with European leagues acting as centres of power, dictating standards and metrics for the global game (Bar-On 2019; Vasconcellos 2009). Finally, there is a last barrier that Europe needs to overcome to be sovereign: the tied game of national teams gold medal in FIFA Men's World Cups. Europe and South America are the two main powers in the world (Pizarro et. al 2020)

accumulating each continent eight gold medals in FIFA Men's World Cups.

2.3 The Neoliberal Crisis

Duménil and Lévy (2011) analyse neoliberalism as a strategy for restoring the power of the upper classes, highlighting how this has led to a financialised and globalised system characterised by recurrent crises and a transfer of wealth to the top, particularly in the US (Duménil and Lévy 2011). This analysis aligns with the discussion of neoliberal influence in the football landscape, which has seen a similar prioritisation of profit, spectacularisation, and the commodification of the fan experience (Andrews and David 2018), resulting in growing inequality between wealthier clubs and the rest, and increased alienation between fans and players (Dubal 2010; Numerato 2015). This framework helps to explore how neoliberalism has transformed football from a primarily sporting activity into a complex cultural and economic phenomenon, with corporatisation and commodification becoming core aspects of the game (Andrews and David 2018; Walsh and Giulianotti 2001). Neoliberalism also acts as a political rationality, shaping how individual athletes are perceived, creating a system where fans become more like consumers, with the spectacle prioritised over the sport (Andrews and David 2018; Davis 2015). This process also leads to the gentrification of stadiums and a commodified fan experience that often marginalises traditional supporters (Dubal 2010; Giulianotti 2002). This includes WF which experiences in Brazil and across the globe a remarkable growth and reveals a large and appealing fan base (FIFA 2023) who exercise alternative identities in safe spaces to be part of the world of football (Schallhorn et al. 2023). Indeed, the women’s game is being mainstreamed (Pope 2013) and commodified (Davis 2015) mostly benchmarked by the men’s game that still exhibits facets of hegemonic masculinity (Knijnik 2014).

2.4 Economy of Visibility

Banet-Weiser (2018), defines the Economy of Visibility as a rationale that uses social causes to promote economic aims. This may be exemplified by capitalising on players' post-feminist subjectivity as a market opportunity (Toffoletti and Thorpe 2018a). While increased participation in women's sports is important for gender equality, the focus on market-driven visibility raises questions about how much genuine policy objectives guide this process. When not all voices are equally amplified by the Economy of Visibility it can perpetuate a lack of inclusivity and representation rather than promote social justice. Therefore, a critical discussion

of WF must move beyond simply celebrating visibility, focusing instead on how these narratives may be shaped by commercial interests and power dynamics, while also considering the experiences of fans that are often excluded from these discussions (Dixon 2015; Pitti 2019).

References

Allison, R. (2021), "Privileging difference: Negotiating gender essentialism in U.S. women's professional soccer," *Sociology of Sport Journal*, 38(2), 158–166. https://doi.org/10.1123/ssj.2020-0016

Allison, R., and Barranco, R. (2021), "'A rich white kid sport?' Hometown socioeconomic, racial, and geographic composition among U.S. women's professional soccer players," *Soccer and Society*, 22(5), 457–469. https://doi.org/10.1080/14660970.2020.1827231

Antonowicz, D., Jakubowska, H., and Kossakowski, R. (2020), "Marginalised, patronised and instrumentalised: Polish female fans in the ultras' narratives," *International Review for the Sociology of Sport*, 55(1), 60–76. https://doi.org/10.1177/1012690218782828

Banet-Weiser, S. (2012), *Authentic: Politics and Ambivalence in a Brand Culture*. University Press.

Banet-Weiser, S. (2015), "'Confidence you can carry!': Girls in crisis and the market for girls' empowerment organizations," *Continuum*, 29(2), 182–193.

Banet-Weiser, S. (2018), *Empowered: Popular Feminism and Popular Misogyny*. Duke University Press.

Castro-Gomez, S. (2001), "Traditional theory and critical theory," *Cultural Critique*, 49, 139–154. Retrieved December 10 2024, from http://muse.jhu.edu/journals/cultural_critique/v049/49.1castro-gomez.html

Cere, R. (2002), "Witches of our age. Women ultras. Football and the media culture," *Sport and Society*, 5(3), 166–188.

Clarke, E., Geurin, A., and Burch, L. (2022), "Team identification, motives, and behaviour: A comparative analysis of fans of men's and women's sport," *Managing Sport and Leisure*. https://doi.org/10.1080/23750472.2022.2049455

Clarkson, B., Parry, K. D., Culvin, A., and Pope, S. (2021), "An institutional analysis of gender (in)equalities, COVID-19 and governance of elite women's football in Australia, England, and USA," *Sport, Business, and Management: An International Journal*. Retrieved December 10 2024, from https://eprints.bournemouth.ac.uk/36158/

Crawford, G., and Gosling, V. K. (2004), "The myth of the 'puck bunny': Female fans and men's ice

hockey," *Sociology*, 38(3), 477–493. https://doi.org/10.1177/0038038504043214

Davis, L. (2015), "Football fandom and authenticity: A critical discussion of historical and contemporary perspectives," *Soccer and Society*, 16(2–3), 422–436. https://doi.org/10.1080/14660970.2012.712159

Delia, E. (2020), "The psychological meaning of team among fans of women's sport," *Journal of Sport Management*, 34(6), 579–590. https://doi.org/10.1123/jsm.2019-0404

de Vasconcellos Ribeiro, C. H., and Dimeo, P. (2009), "The experience of migration for Brazilian football players," *Sport in Society*, 12(6), 725–736. https://doi.org/10.1080/17430430902944159

Dixon, K. (2013), "Learning the game: Football fandom culture and the origins of practice," *International Review for the Sociology of Sport*, 48(3), 334–348. https://doi.org/10.1177/1012690212441157

Dixon, K. (2015), "A woman's place recurring: Structuration, football fandom, and sub-cultural subservience," *Sport in Society: Cultures, Commerce, Media, Politics*, 18(6), 636–651. https://doi.org/10.1080/17430437.2014.982541

Dubal, S. (2010), "The neoliberalization of football: Rethinking neoliberalism through the commercialization of the beautiful game," *International Review for the Sociology of Sport*, 45(2), 123–146. https://doi.org/10.1177/1012690210362426

Duménil, G., and Lévy, D. (2011), *The Crisis of Neoliberalism*. Harvard University Press.

Dunn, C. (2016), *Football and the Women's World Cup: Organisation, Media and Fandom*. Palgrave Macmillan. https://doi.org/10.1057/9781137567338

Dussel, E. (2000), "Europe, modernity, and Eurocentrism," *Nepantla: View from the South*, 1(3), 465–478.

Escobedo, L., and Bar-On, T. (2019), "FIFA seen from a postcolonial perspective," *Soccer and Society* 20(1), 39–60. https://doi.org/10.1080/14660970.2016.1267632

FIFA (2023), *FIFA Women's Benchmarking Report 2023*. Retrieved December 10 2024, from https://digitalhub.fifa.com/m/4220125f7600a8a2/original/FIFA-Women-s-Benchmarking-Report-2023.pdf

Gastaldo, É. (2005), "Uma arquibancada eletrônica: Reflexões sobre futebol, mídia e sociabilidade no Brasil," *Campos - Revista de Antropologia*, 6, 113–123. https://doi.org/10.5380/cam.v6i0.4512

Giulianotti, R. (2002), "Supporters, followers, fans, and flaneurs: A taxonomy of spectator

identities in football," *Journal of Sport and Social Issues*, 26(1), 25–46. https://doi.org/10.1177/0193723502261003

Guest, A., and Luijten, A. (2018), "Fan culture and motivation in the context of successful women's professional team sports: A mixed-methods case study of Portland Thorns fandom," *Sport in Society*, 21(7), 1013–1030. https://doi.org/10.1080/17430437.2017.1346620

Helal, R., Soares, A. J., and Lovisolo, H. (2012), *A invenção do país do futebol*. Mauad X FAPERJ.

Jones, K. W. (2008), "Female fandom: Identity, sexism, and men's professional football in England," *Sociology of Sport Journal*, 25(4), 516–537. https://doi.org/10.1123/ssj.25.4.516

Knijnik, J. (2014), "Gendered barriers to Brazilian female football: 20th century legacies," in J. Hargreaves and E. Anderson, eds., *Routledge Handbook of Sport, Gender and Sexuality*. Routledge.

Meân, L. (2012), "Empowerment through sport? Female fans, women's sport, and the construction of gendered fandom," in K. Toffoletti and P. Mewett, eds., *Sport and Its Female Fans*, 169–192. Routledge. https://doi.org/10.4324/9780203101384

Mignolo, W. D. (2007), "Introduction: Coloniality of power and de-colonial thinking," *Cultural Studies*, 21(2–3), 155–167. https://doi.org/10.1080/09502380601162498

Molina, R. (2024), "Brazil in Olympic football: Relive the national team's performance in each edition," *Olympics.com*. Retrieved December 10 2024, from https://www.olympics.com/pt/noticias/brasil-futebol-jogos-olimpicos-relembre-o-desempenho-da-selecao-em-cada-edicao

Numerato, D. (2015), "Who says 'No to modern football?' Italian supporters, reflexivity, and neo-liberalism," *Journal of Sport and Social Issues*, 39(2), 120–138. https://doi.org/10.1177/0193723514530566

Perissé, A. (2024), "Relive the silver medal of the Brazilian women's football team in Paris 2024, the third in the Olympic Games," *Olympics.com*. Retrieved December 10 2024, from https://www.olympics.com/pt/noticias/reveja-prata-selecao-brasileira-futebol-feminino-paris-2024-terceira-jogos-olimpicos

Pfister, G., Lenneis, V., and Mintert, S. (2013), "Female fans of men's football – A case study in Denmark," *Soccer and Society*, 14(6), 850–871. https://doi.org/10.1080/14660970.2013.843923

Pitti, I. (2018), "Being women in a male preserve: An ethnography of female football ultras,"

Journal of Gender Studies, 28(3), 318–329. https://doi.org/10.1080/09589236.2018.1443803

Pizarro, J., Rial, C., and Rigo, L. (2020), "Decolonialidade e futebol: A quebra da lógica periferia-centro," *Campos Neutrais - Revista Latino-Americana de Relações Internacionais*, 2(1), 50–69. https://doi.org/10.14295/cn.v2i1.11695

Pope, S. (2013), "The love of my life: The meaning and importance of sport for female fans," *Journal of Sport and Social Issues*, 37(2), 176–195. https://doi.org/10.1177/0193723512455919

Prates, G. (2024), "Brazilian men's football team: See the main historical titles," *Olympics.com*. Retrieved December 10 2024, from https://www.olympics.com/pt/noticias/selecao-brasileira-futebol-masculino-principais-titulos-historicos

Quijano, A. (2000), "Coloniality of power and Eurocentrism in Latin America," *International Sociology*, 15(2), 215–232. https://doi.org/10.1177/0268580900015002005

Rocco Jr., A. J. (2012), *Marketing e gestão do esporte*. Atlas.

Rozo, K. (2024), "Eurocentric globalization of football: Coloniality, consumption, social distinction and identities of transnational fans in Latin America," *Soccer and Society*, 25(1), 1–13. https://doi.org/10.1080/14660970.2024.2332087

Saldívar, J. D. (2007), "Unsettling race, coloniality, and caste: Anzaldúa's *Borderlands/La Frontera*, Martinez's *Parrot in the Oven*, and Roy's *The God of Small Things*," *Cultural Studies*, 21(2–3), 339–367. https://doi.org/10.1080/09502380601162563

Sandvoss, C. (2003), *A game of two halves: Football fandom, television and globalisation*. Routledge. https://doi.org/10.4324/9780203561393

Schallhorn, C., Symons, K., Kunert, J., and Doreen Rose, L. (2023), "Inclusive, inviting, inspiring: Insights into the experiences of women's football fans in Australia and Germany," *International Review for the Sociology of Sport*. https://doi.org/10.1177/10126902231215296

Simmers, C., Rast, R., and Coleman, J. (2023), "Who says she's not a true fan? Perceptions of fan authenticity among Gen Z women sports fans," *Sport Marketing Quarterly*, 32(3), 189–206. https://doi.org/10.32731/SMQ.323.092023.02

Sveinson, K., and Hoeber, L. (2015), "Overlooking the obvious: An exploration of what it means to be a sport fan from a female perspective," *Leisure Studies*, 34(4), 405–419. https://doi.org/10.1080/02614367.2014.923496

Sveinson, K., and Hoeber, L. (2016), "Female sport fans' experiences of marginalization and empowerment," *Journal of Sport Management*, 30(1), 8–21. https://doi.org/10.1123/jsm.2014-0221

Tlostanova, M. (2008), "The Janus-faced empire distorting Orientalist discourses: Gender, race and religion in the Russian/(post)Soviet constructions of the 'Orient'." *[Fonte não informada — necessário completar com nome da revista ou coletânea, volume, páginas e link, se aplicável.]*

Toffoletti, K., and Thorpe, H. (2018), "Female athletes' self-representation on social media: A feminist analysis of neoliberal marketing strategies in 'economies of visibility'," *Feminism and Psychology*, 28(1), 11–31.

Valenti, M., Scelles, N., and Morrow, S. (2019), "The determinants of stadium attendance in elite women's football: Evidence from the UEFA Women's Champions League," *Sport Management Review*, 23(3), 509–520. https://doi.org/10.1016/j.smr.2019.04.005

Walsh, A. J., and Giulianotti, R. (2001), "This sporting Mammon: A normative critique of the commodification of sport," *Journal of the Philosophy of Sport*, 28(1), 53–77. https://doi.org/10.1080/00948705.2001.9714600

Zalcman, A. (2023), "Women's World Cup: Who are the biggest champions?" *Olympics.com*. Retrieved December 10 2024, from https://www.olympics.com/pt/noticias/copa-mundo-feminina-maiores-campeas-todas-vencedoras

Corporate Activism: A Measurement Proposal

Luiza D. Braga

Matheus G. Tardin

Marcelo G. Perin

The phenomenon of Corporate Activism (CA) refers to public demonstrations, through statements and/or actions, in support or opposition to partisan sociopolitical issues by various corporate agents (companies, brands, and/or leaders). It encompasses brand activism (Moorman 2020, Vredenburg et al. 2020), CEO activism (Chatterji and Toffel 2019, Hambrick and Wowak 2021), and corporate social advocacy (Dodd and Supa 2014, Wettstein and Baur 2016).

Despite its increasing relevance, the lack of a robust, reproducible measure for CA limits its theoretical and practical advancement. Empirical studies often rely on event-based analysis, binary classifications, or case-specific interpretations (Bedendo and Siming 2021, Bhagwat et al. 2020, Burbano 2021). To address this gap, this study aims to: (i) conceptualize CA comprehensively, and (ii) propose a validated scale to measure the CA construct. By advancing knowledge and tools to measure this phenomenon, this research contributes to both academic and practical applications, enabling the assess the corporate level of sociopolitical engagement of companies, brands, and its leaders.

Literature Review

Defining Corporate Activism

CA represents the intersection of business and sociopolitical discourse. It is characterized by corporations engaging in sociopolitical causes, driven by a combination of altruistic goals (e.g., promoting social change) and self-interested motives (e.g., gaining legitimacy or strengthening stakeholder relationships). Unlike CSR, which focuses on non-divisive issues, CA addresses polarizing topics that evoke strong reactions (Vredenburg et al. 2020, Özturan and Grinstein 2022). Furthermore, CA is distinct from corporate political activities like lobbying or campaign contributions, as it involves public advocacy rather than behind-the-scenes strategies (Bhagwat et al. 2020, Wettstein and Baur 2016).

CA manifests across various corporate agents, including leaders, brands, and companies. In this research, we take a comprehensive view of activism practice by corporate actors, referring to it as corporate activism (Braga et al. 2024). Whether through public statements, strategic initiatives, or sociopolitical campaigns, CA captures the evolving role of corporations in addressing societal challenges, balancing strategic interests with the pursuit of social change.

CA Strategic Characteristics and Measurement

Through the lens of signaling theory (Spence 2002), we can understand strategic characteristics of CA, reflecting its varying manifestations in corporate practice. CA involves not only communication efforts, such as media campaigns or public declarations, but also tangible actions that demonstrate genuine commitment to the advocated cause (Sarkar and Kotler 2020). These may vary in their degree of clarity and intensity, encompassing bold, explicit statements as well as softer or more ambiguous approaches (Bhagwat et al. 2020).

Additionally, the level of commitment over time is another critical feature of CA, where sustained engagement signals credibility and long-term dedication (Özturan and Grinstein 2022). Furthermore, the way a corporation's stance is presented—whether clear and transparent or emotionally impactful—influences how stakeholders perceive its authenticity and effectiveness (Mirzaei, Wilkie, and Siuki 2022, Vredenburg et al. 2020).

Prior studies have employed diverse approaches to measure CA, ranging from content analysis of corporate statements (Bhagwat et al. 2020), experimental manipulations of public responses (Appels 2022). Recently, Saracevic and Schlegelmilch (2024) introduced the Activist Brand Perception (ABP) scale, a two-dimensional instrument that evaluates consumer perceptions of activist brands through clarity and commitment. While their work provides valuable insights into brand-level activism, this study extends the scope by integrating companies, brands, and CEOs into a unified framework, offering a multidimensional tool to assess CA across diverse stakeholder perspectives.

Methodology

To achieve its objectives, this study follows a four-step scale development process (Netemeyer, Bearden, and Sharma 2003): (i) content domain and item generation, (ii) item purification, (iii) construct validation and reliability assessment, and (iv) replication.

Step one consisted of a deep, systematic literature review that identified seven dimensions of CA, leading to an initial pool of 41 items. Expert panels refined these dimensions and items for clarity and relevance, and it remained four dimensions (messaging, acting, issue controversy, and consistency) and 25 items, see Table 1. Step two consists in applying a survey of over 150 respondents to test the initial item pool using exploratory factor analysis (EFA). Step three applies confirmatory factor analysis (CFA) and structural equation modeling (SEM) to validate the scale's psychometric properties, using data from 400 respondents. Finally, step four

tests the scale's generalizability with sample of 400 respondents, employing back-translation to ensure cultural and idiomatic equivalence.

Funding Acknowledgement

This study was financed, in part, by the São Paulo Research Foundation (FAPESP), Brasil. Process Number 2022/13794-4.

	Dimension	Items English
	Messaging	The company (brand/CEO) publicly expresses support for (or opposition to) controversial sociopolitical causes.
	Messaging	The company (brand/CEO) clearly communicates its support for (or opposition to) sociopolitical causes.
	Messaging	The company (brand/CEO) promotes public discussions about the controversial sociopolitical causes it supports.
	Messaging	The company (brand/CEO) explicitly discloses its support for (or opposition to) controversial sociopolitical causes.
	Messaging	The company (brand/CEO) provides information about the impacts of the sociopolitical causes it supports to the public, including consumers and employees.
	Acting	The company (brand/CEO) demonstrates a commitment of significant financial resources, such as a portion of its revenue or profits, to support sociopolitical causes.
	Acting	The company (brand/CEO) engages in concrete actions that demonstrate its support for a sociopolitical cause.
	Acting	The company (brand/CEO) implements changes in its operations, processes, and daily practices to benefit a sociopolitical cause.
	Acting	The company (brand/CEO) partners with organizations that work on sociopolitical causes.
0	Acting	The company (brand/CEO) dedicates time and effort from its leadership and employees to support a sociopolitical cause.
1	Acting	The company (brand/CEO) develops internal policies aligned with the sociopolitical causes it supports.
2	Sociopolitical Issue Controversy	The company (brand/CEO) supports sociopolitical causes that generate divergent opinions in society.
3	Sociopolitical Issue Controversy	The company (brand/CEO) takes positions on sociopolitical causes that provoke strong reactions, divergent opinions, and heated debates across different segments of society.

4	Sociopolitical Issue Controversy	The company (brand/CEO) engages in sociopolitical causes that generate controversy and receive widespread media attention.
5	Sociopolitical Issue Controversy	The company (brand/CEO) supports sociopolitical causes that are interpreted differently by distinct groups and are not generally accepted by everyone or the majority.
6	Sociopolitical Issue Controversy	The company (brand/CEO) supports sociopolitical causes that challenge widely established practices or advocate for the preservation of social traditions.
7	Sociopolitical Issue Controversy	The company (brand/CEO) supports sociopolitical causes that frequently divide opinions among different social groups.
8	Consistency	The company's (brand's/CEO's) internal practices are aligned with the sociopolitical causes it supports.
9	Consistency	The company (brand/CEO) demonstrates a long-term commitment to the sociopolitical causes it supports.
0	Consistency	The company (brand/CEO) is willing to take reputational risks to support its sociopolitical causes.
1	Consistency	The company (brand/CEO) promotes significant and consistent changes that reinforce its sociopolitical activism.
2	Consistency	The company (brand/CEO) is willing to sacrifice part of its financial returns to the sociopolitical causes it supports.
3	Consistency	The company (brand/CEO) always takes a stance on controversial sociopolitical issues.
4	Consistency	The company (brand/CEO) makes a continuous effort to demonstrate its support for controversial sociopolitical issues.
5	Consistency	The company's (brand/CEO) activism is not perceived as opportunistic but as part of its values and identity.

References

Appels, Moritz (2022), "CEO Sociopolitical Activism as a Signal of Authentic Leadership to Prospective Employees," *Journal of Management*, 0 (0), 1–39.

Bhagwat, Yashoda, Nooshin L. Warren, Joshua T. Beck, and George F. Watson (2020), "Corporate Sociopolitical Activism and Firm Value," *Journal of Marketing*, 84 (5) 1–21.

Braga, Luiza, Amir Grinstein, Matheus Tardin, and Marcelo Perin (2024), "Understanding reaction to corporate activism: The moderating role of polarization," *PNAS Nexus*,3.

Mirzaei, Abas, Dean C. Wilkie, and Helen Siuki (2022), "Woke Brand Activism Authenticity or the Lack of It," *Journal of Business Research*, 139 (August), 1–12.

Netemeyer, Richard G., William O. Bearden, and Subhash Sharma (2003), *Scaling Procedures: Issues and Aplications*, *Sage*.

Özturan, Peren and Amir Grinstein (2022), "Impact of Global Brand Chief Marketing Officers' Corporate Social Responsibility and Sociopolitical Activism Communication on Twitter," *Journal of International Marketing*, 30 (3), 1–11.

Saracevic, Selma and Bodo B. Schlegelmilch (2024), "Activist brand perception: Conceptualization, scale development and validation," *Journal of Business Research*, 180 (August 2023), 114732.

Sarkar, Christian and Philip Kotler (2020), *Brand Activism From Purpose to Action*, Idea Beat Press.

Spence, Michael (2002), "Signaling in Retrospect and the Informational Structure of Markets," *The American Economic Review*, 92 (3), 434–59.

Vredenburg, Jessica, Sommer Kapitan, Amanda Spry, and Joya A. Kemper (2020), "Brands Taking a Stand: Authentic Brand Activism or Woke Washing?," *Journal of Public Policy and Marketing*, 39 (4), 444–60.

Corporate Social Irresponsibility in Sports Mega-Events: A Systematic Literature Review and Avenues for Future Research

Reynald Brion

Renan Petersen-Wagner

Mariana Bassi-Suter

Introduction

Sport mega-events (SMEs) are short-term events with long-term consequences (Roche, 1994) that continue to attract billions of people across the world. Despite being celebrated for their spectacle and their capability to attract global attention, SMEs are also known to be associated with irresponsible behaviors, such as environmental degradation, marginalization of local communities, workers' exploitation, minority exclusion, corruption and doping (Abeza et al., 2020; Horne, 2018; Van Rheenen, 2014).

Recently, research exploring motivations, processes and consequences of irresponsible actions has started to emerge under the term "Corporate Social Irresponsibility" (Clark et al., 2022). CSI appeared as a critique of corporate social responsibility (CSR) initiatives that were described as "too little, too late and too superficial, directed at the wrong object, and not resulting in an exercise or responsibility commensurate with the size and importance of the modern corporation" (Ferry, 1962, p. 67). Armstrong (1977, p. 185) defines corporate irresponsibility as "a decision to accept an alternative that is thought by the decision maker to be inferior to another alternative when the effects upon all parties are considered. Generally, it implies a gain for one party at the expense of the total system". CSI involves actions or behaviors by firms that intentionally or unintentionally cause harm to stakeholders and society (Jain & Zaman, 2020).

SMEs offer a special site for the study of CSI due to their immense visibility, complex stakeholder network, substantial economic impact (Martyn, 1969), and the significant environmental and social implications associated with hosting them (Muller, 2015). However, despite the apparent overlap between the two topics, research on SMEs has mostly adopted a case study approach, ignoring existing literature on corporate irresponsibility, while most CSI literature has adopted a more global approach to analyzing CSI practices. Understanding CSI brings in three main contributions as it helps: *i)* to better organize the event and mitigate irresponsible behaviors; *ii)* provide positive legacies; and *iii)* create events that not only benefit

SMEs' organizing committees and sport governing bodies but also the local population and economy, and society at large. This study aims answer the following research questions: *i)* What are the reasons for the appearance of CSI in SMEs?; *ii)* What are the manifestations of CSI in SMEs?; and *iii)* What are the consequences of CSI in SMEs for different stakeholders?

Methods

To better understand CSI within SMEs we have conducted a systematic literature review following the SPAR-4-SLR protocol (Paul et al., 2021) by employing a three-stage process: assembling relevant studies, organizing them, and analyzing emerging themes. An initial literature review on SMEs and CSI helped refine key concepts and search terms. Using systematic search methods (Campopiano et al., 2023), we sourced studies from Scopus, Google Scholar, Semantic Scholar, and CrossRef. After removing duplicates, 3,100 unique documents remained, which were filtered to 1,506 English journal articles. Screening by title reduced this to 246, then 111 after abstract analysis. Ultimately, 81 articles were included in our review. Each study was examined for its focus within the Antecedents – Decisions – Outcomes (ADO) framework (Paul & Benito, 2018), methods, theoretical background, and stakeholder involvement. Stakeholders were categorized into those responsible for and those impacted by CSI. We adapted Koenigstorfer et al.'s (2019) list, condensing 31 stakeholder types into 13, including athletes, commercial partners, consumers, government, media, and sponsors.

Results and discussion

In our systematic literature review, 23 papers (28.4%) explored CSI **antecedents,** primarily conceptual (N=17), focusing on governing bodies (N=17) and organizing committees (N=12). These antecedents were grouped into four themes: (i) economic pressures, (ii) governance and transparency, (iii) integrity and organizational culture, and (iv) media's dual role. Maennig (2002, 2005) described corruption in SMEs as a rational economic choice, highlighting weak sanctions. Governance issues, including secrecy and lack of accountability (Henne, 2015), foster bribery and unethical decisions. Organizational culture can normalize CSI, while weak fraud prevention measures (Verschuuren, 2021) remain ineffective. Media can promote transparency but also facilitate CSI (Numerato, 2009).

Regarding **CSI decision processes**, 38 papers were analyzed, mostly conceptual (N=20), examining governing bodies (N=24) and organizing committees (N=22). Three key themes emerged: (i) CSI in sponsorship/commercial decisions, (ii) governance and accountability, and (iii)

social, environmental, and ethical issues. Sponsorships can either perpetrate or fall victim to CSI (Fruh et al., 2023; Gorse & Chadwick, 2010), with concepts like "sportswashing" normalizing unethical actions. Governance concerns persist, with SMEs overestimating outcomes and governing bodies operating with secrecy (Jennings, 2011). CSI also affects social and environmental aspects, such as local displacement (Curi et al., 2011) and socioeconomic divides, though some argue SMEs can promote human rights (van Rheenen, 2014).

CSI consequences are the most studied aspect, with 58 papers identifying outcomes, 40 focusing on SMEs. These were categorized into (i) social impact and legacy, (ii) fan and consumer reactions, and (iii) organizational consequences. While SMEs can be activist platforms (van Rheenen, 2014), their human rights impact is mixed (Adams & Piekarz, 2015). Consumer concerns about CSI vary (Koenigstorfer, 2023), and marketing research highlights fans' coping mechanisms (Lee & Kwak, 2016). Governance scandals affect stakeholder reactions, reducing charitable donations (Hughes & Shank, 2008) and sponsor credibility (Kulczycki & Koenigstorfer, 2016). Preventative measures by sports organizations remain largely ineffective (Verschuuren, 2021).

The literature presents a multifaceted view of CSI in SMEs, emphasizing its economic, political, and social significance beyond sports, impacting broader society and business. This reinforces the idea that SMEs have a global influence, with both positive and negative consequences. Given their vast audience, CSI in SMEs extends beyond the sporting world, affecting governance and ethical standards in wider contexts. Addressing these complexities requires a focus on transparency, ethical management, and accountability. Rather than reacting to CSI, governing bodies, organizers, and sponsors should foster an environment that promotes ethical behavior.

References (full list of references identified by the SLR available under request)

Abeza, G., O'Reilly, N., Prior, D., Huybers, T., & Mazanov, J. (2020). The impact of scandal on sport consumption: Do different scandal types have different levels of influence on different consumer segments? *European Sport Management Quarterly*, *20*(2), 130–150. https://doi.org/10.1080/16184742.2019.1586974

Adams, A., & Piekarz, M. (2015). Sport events and human rights: Positive promotion or negative erosion? *Journal of Policy Research in Tourism, Leisure and Events*, *7*(3), 220–236. https://doi.org/10.1080/19407963.2014.997864

Armstrong, J. S. (1977). Social irresponsibility in management. *Journal of Business Research*, *5*(3), 185–213. https://doi.org/10.1016/0148-2963(77)90011-X

Campopiano, G., Gabaldón, P., & Gimenez-Jimenez, D. (2023). Women Directors and Corporate Social Performance: An Integrative Review of the Literature and a Future Research Agenda. *Journal of Business Ethics*, *182*(3), 717–746. https://doi.org/10.1007/s10551-021-04999-7

Clark, C. E., Riera, M., & Iborra, M. (2022). Toward a Theoretical Framework of Corporate Social Irresponsibility: Clarifying the Gray Zones Between Responsibility and Irresponsibility. *Business & Society*, *61*(6), 1473–1511. https://doi.org/10.1177/00076503211015911

Curi, M., Knijnik, J., & Mascarenhas, G. (2011). The Pan American Games in Rio de Janeiro 2007: Consequences of a sport mega-event on a BRIC country. *International Review for the Sociology of Sport*, *46*(2), 140–156. https://doi.org/10.1177/1012690210388461

Ferry, W. H. (1962). Forms of Irresponsibility. *The ANNALS of the American Academy of Political and Social Science*, *343*(1), 65–74. https://doi.org/10.1177/000271626234300109

Fruh, K., Archer, A., & Wojtowicz, J. (2023). Sportswashing: Complicity and Corruption. *Sport, Ethics and Philosophy*, *17*(1), 101–118. https://doi.org/10.1080/17511321.2022.2107697

Gorse, S., & Chadwick, S. (2010). Conceptualising corruption in sport: Implications for sponsorship programmes. *European Business Review*, *July/August*.

Henne, K. (2015). Reforming Global Sport: Hybridity and the Challenges of Pursuing Transparency. *Law & Policy*, *37*(4), 324–349. https://doi.org/10.1111/lapo.12044

Horne, J. (2018). Understanding the denial of abuses of human rights connected to sports mega-events. *Leisure Studies*, *37*(1), 11–21. https://doi.org/10.1080/02614367.2017.1324512

Jain, T., & Zaman, R. (2020). When Boards Matter: The Case of Corporate Social Irresponsibility. *British Journal of Management*, *31*(2), 365–386. https://doi.org/10.1111/1467-8551.12376

Jennings, A. (2011). Investigating corruption in corporate sport: The IOC and FIFA. *International Review for the Sociology of Sport*, *46*(4), 387–398. https://doi.org/10.1177/1012690211408845

Koenigstorfer, J. (2023). Human rights issues in host countries of the Olympic Games and resulting differences in consumer evaluations. *European Sport Management Quarterly*, *23*(1), 295–314. https://doi.org/10.1080/16184742.2020.1850825

Koenigstorfer, J., Bocarro, J. N., Byers, T., Edwards, M. B., Jones, G. J., & Preuss, H. (2019). Mapping research on legacy of mega sporting events: Structural changes, consequences, and stakeholder evaluations in empirical studies. *Leisure Studies*, *38*(6), 729–745. https://doi.org/10.1080/02614367.2019.1662830

Kulczycki, W., & Koenigstorfer, J. (2016). Why sponsors should worry about corruption as a mega sport event syndrome. *European Sport Management Quarterly*, *16*(5), 545–574. https://doi.org/10.1080/16184742.2016.1188839

Lee, J., & Kwak, D. (2016). Consumers' Responses to Public Figures' Transgression: Moral Reasoning Strategies and Implications for Endorsed Brands. *Journal of Business Ethics*, *137*(1), 101–113. https://doi.org/10.1007/s10551-015-2544-1

Maennig, W. (2002). On the Economics of Doping and Corruption in International Sports. *Journal of Sports Economics*, *3*(1), 61–89. https://doi.org/10.1177/1527002502003001005

Maennig, W. (2005). Corruption in International Sports and Sport Management: Forms, Tendencies, Extent and Countermeasures. *European Sport Management Quarterly*, *5*(2), 187–225. https://doi.org/10.1080/16184740500188821

Martyn, H. (1969). The Influence of Sports on International Tourism. *Business & Society*, *9*(2), 38–44. https://doi.org/10.1177/000765036900900205

Müller, M. (2015). What makes an event a mega-event? Definitions and sizes. *Leisure Studies*, *34*(6), 627–642. https://doi.org/10.1080/02614367.2014.993333

Numerato, D. (2009). The Media and Sports Corruption: An Outline of Sociological Understanding. *International Journal of Sport Communication*, *2*(3), 261–273. https://doi.org/10.1123/ijsc.2.3.261

Paul, J., & Benito, G. R. G. (2018). A review of research on outward foreign direct investment from emerging countries, including China: What do we know, how do we know and where should we be heading? *Asia Pacific Business Review*, *24*(1), 90–115. https://doi.org/10.1080/13602381.2017.1357316

Paul, J., Lim, W. M., O'Cass, A., Hao, A. W., & Bresciani, S. (2021). Scientific procedures and rationales for systematic literature reviews (SPAR-4-SLR). *International Journal of Consumer Studies*, *45*(4). https://doi.org/10.1111/ijcs.12695

Van Rheenen, D. (2014). A skunk at the garden party: The Sochi Olympics, state-sponsored homophobia and prospects for human rights through mega sporting events. *Journal of Sport & Tourism*, *19*(2), 127–144. https://doi.org/10.1080/14775085.2014.949287

Verschuuren, P. (2021). Assessing the whistleblowing policies of international sport organizations. *Sport, Business and Management: An International Journal*, *11*(4), 405–429. https://doi.org/10.1108/SBM-05-2020-0040

Credit Consumption and Indebtedness: Challenges and Implications for Macromarketing

Danielli Leite Campos Monteiro

Verónica Peñaloza

Luiz Alves Cruz

Introduction

During the 1960s and 1970s, scholars like Zygmunt Bauman and Jean Baudrillard dedicated themselves to studying a post-war phenomenon: The rise of consumer society and the consolidation of a new culture based on signs. This transformation was directly influenced by mass media and technological advances, which became the structuring forces of the contemporary system.

Thus, Baudrillard (1995 | 2008) presents a sharp analysis of consumer society, arguing that objects transcend their practical utility to become complex symbolic systems that shape social relations. Meanwhile, Bauman (2009, 2017) contends that the consumer goods market promotes the illusion that individuals achieve social belonging and fulfill their needs and desires through consumption. It is from this illusion that consumer culture emerges.

The rise in consumption is both financed and stimulated by the expansion of consumer credit. With the globalization of financial markets, governments began liberalizing their economies, making credit more accessible on an international scale. Today, credit has reached an unprecedented level of sophistication, driven by technological advancements and shifts in consumer behavior. Moreover, processes are now faster and less bureaucratic than ever, allowing individuals to access instant credit, financial products, personal loans, and even informal credit (loan sharking) through digital platforms (Omowole et al. 2024; Desyatnyuk and Ptashchenko 2024). Consequently, credit is not only more available and digitized but also presents significant challenges in terms of liability and risk management (Singh et al. 2024)

In this context, as they seek stability and economic growth, many emerging markets are relying on the expansion of consumer credit to stimulate consumption and, in turn, strengthen their economies (Garcia-Escribano and Han 2015). Anderloni et al. (2012) highlight that, while credit allows families to improve their standard of living by enabling greater consumption, concerns remain about outstanding debt among over-indebted individuals, which places them in a state of financial vulnerability.

Since the 1990s, macromarketing research has increasingly focused on problem-oriented explorations of the societal impacts of marketing processes. There has been rapid growth in interest in understanding the nature and consequences of consumer culture, as well as in assessing quality-of-life outcomes and measures (Layton and Grossbart 2006).

These theoretical reflections demonstrate that contemporary macromarketing requires an approach that extends beyond traditional market studies, incorporating social, ethical, and political issues arising from consumer behavior in complex contexts. Monieson (1981, 1989) highlighted the gap between marketing science and practice, emphasizing the urgency of an eclectic tradition in macromarketing and advocating for the integration of diverse perspectives to enhance the understanding of market phenomena.

This perspective underscores the importance of an approach that moves beyond mere technical analysis, incorporating ethical, social, and cultural dimensions—such as the role of credit and the risks of indebtedness—to better understand and reshape marketing systems for the benefit of society. In this context, Layton and Grossbart (2006) proposed an exercise on future perspectives in macromarketing research, presenting a theoretical framework based on twelve key challenges.

Given this context, the guiding question of this theoretical study is: How can credit consumption and indebtedness be studied as critical variables within the broader theoretical framework of macromarketing, considering their social, cultural, and broader impacts on market dynamics? By exploring this issue, we aim not only to understand the transformations driven by credit mechanisms in the economy and society, but also to contribute to the development of strategies and public policies that can mitigate their negative effects, balancing economic growth with the promotion of social welfare.

Consumer society

In post-modern times, the economy is shifting from a production orientation to a consumption orientation, supported by four key trends: the valorization of consumption as a social imperative, increasing purchasing power driven by the credit economy, a diverse market reflecting differentiated consumer choices, and a high level of education that fosters market sophistication and innovation (Venkatesh 1999). Marketing plays a significant role in this transformation (Ramanauskas et al. 2018; Shao et al. 2012).

Lipovetsky (2007, p. 31), in his philosophical reflection on happiness in the age of hyperconsumption, writes, “This is a type of society that replaces coercion with seduction, duty with hedonism, saving with spending, solemnity with humor, repression with liberation, promises of the future with the present.” It is a society that seeks to satisfy desire through consumption, propagated by advertising.

Credit expansion and its effects

In the past, credit was primarily granted by traditional banking institutions and focused on financing business activities, thus benefiting the upper classes. Access to these resources was restricted and contingent upon criteria such as personal credibility and pre-existing relationships between the individual and their lender, often represented by family members or friends. However, in the post-World War II period and with the intensification of the global economy, a significant transformation occurred: credit began to play a central role in modern economies, highlighted by the emergence of consumer credit and the widespread adoption of credit cards. Although the majority of loans were still directed towards financing durable goods—such as housing and automobiles—the second half of the 20th century witnessed a veritable explosion in credit use, fueled by both economic growth and innovations in financial services (Cohen 2007). These developments not only expanded access to financial resources but also altered consumption practices, necessitating more sophisticated financial management and deeper reflection on sustainable consumption and the risks of indebtedness

Thus, with increased access to credit and growing concerns about default, a portion of the population is finding itself in debt. Studies show that the effects of debt non-payment range from depression to suicidal ideation (Turunen and Hiilamo 2014; Blázquez and Budría 2018; Ferreira 2021). Moreover, according to Bett et al. (2007), in the past two decades, alongside the significant changes in financial regulations within the member countries of the Organization for Economic Co-operation and Development (OECD), which have facilitated the expansion of credit, there has also been an increase in consumer spending. Loans have become a more common source of financing for families, which has led to a substantial reduction in household savings

Maurer (2014) argues that the transformation of credit into a consumer product requires an approach that goes beyond the traditional logic of supply and demand. In this context, credit assumes a dual role: as a tool to stimulate consumption and as a source of potential social risks,

such as family and individual indebtedness. As such, credit consumption has an intrinsic relationship with marketing, since consumers are part of a consumer culture increasingly centered around the availability of credit. Therefore, concern with credit should not be confined to the realm of micromarketing but should extend to macromarketing practices and strategies, given the impact of these practices on social cohesion and well-being.

According to Bauman (2009, p. 36), no serious thought has been given to a society fueled by consumption and credit, as financial institutions and governments have yet to 'get to the root of the problem in their diagnoses.' However, it is known that modernity has made it easier for individuals to become consumers of credit, and escaping the condition of borrower has never been more difficult

Conclusion

Over the decades, the view of marketing has evolved from being a tool primarily focused on mass sales and consumerism to becoming a more critical and reflective discipline that seeks to balance economic interests with social and environmental well-being. This shift towards more critical marketing has been driven by the recognition that marketing practices possess significant power to shape society and must be employed responsibly, ethically, and sustainably (Tadajewski 2010; Layton and Grossbart 2006). Instead of encouraging rampant consumerism, marketing should foster more responsible consumption, which not only aims for economic profit but also considers its impact on society and the environment (Monieson 1981; Layton and Grossbart 2006).

In this context, it is evident that credit consumption emerges as a multifaceted phenomenon. While it facilitates access to goods and services, thereby stimulating market expansion, it also carries significant risks associated with over-indebtedness and the financial vulnerability of consumers. It is therefore crucial that these effects are thoroughly studied to develop policies and strategies that minimize potential harm and promote a sustainable balance between economic growth and social welfare.

Thus, this article proposes that credit consumption, extensively studied by economists (cite articles...), as well as the indebtedness resulting from this system and its effects today (cite...), be examined within the macromarketing framework, as these phenomena reflect significant transformations in contemporary socioeconomic relations. Integrating these analyses

into macromarketing discussions could provide a more comprehensive understanding of the social and economic impacts resulting from easier access to credit, highlighting, for instance, how such practices influence both market development and the social responsibility and well-being of individuals. Given the growing relevance of credit consumption and its potential negative effects, such as over-indebtedness, it is proposed that these studies be incorporated into the field of macromarketing, enabling the development of strategies and public policies aimed at mitigating associated risks and ensuring a balance between economic growth and social equity.

References

Anderloni, L., Bacchiocchi, E., and Vandone, D. (2012), "Household financial vulnerability: An empirical analysis," Research in Economics, 66(3), 284-296. https://doi.org/10.1016/j.rie.2012.03.001

Baudrillard, J. (2008). A sociedade de consumo (The consumer society). 2d edition. Lisbon: Edições, 70 (First edition published in 1995).

Bauman, Z. (2009). A arte da vida (The art of Life). São Paulo, Brazil: Schwarcz-Companhia das Letras.

Bauman, Z. (2017). Modernidade Líquida (Liquid Modernity). Rio de Janeiro, Brazil: Zahar.

Blázquez, M. and Budría, S. (2018), "The effects of over-indebtedness on individual health," Hacienda Pública Española, (227), 103-131.

Cohen, M. J. (2007), "Consumer credit, household financial management, and sustainable consumption," International Journal of Consumer Studies, 31(1), 57-65. https://doi.org/10.1111/j.1470-6431.2005.00485.x

Desyatnyuk, O., and Ptashchenko, O. (2024, September), "Impact of Digitalization on Financial Systems and Services," In 2024 - 14th International Conference on Advanced Computer Information Technologies (ACIT) (pp. 334-337). IEEE. 10.1109/ACIT62333.2024.10712540

Garcia-Escribano, M. M., and Han, M. F. (2015). Credit expansion in emerging markets: Propeller of growth?. International Monetary Fund.

Layton, R. A., and Grossbart, S. (2006), "Macromarketing: Past, present, and possible future," Journal of Macromarketing, *26(2),* 193-213. https://doi.org/10.1177/0276146706294026

Lipovetsky, Gilles (2007), A felicidade paradoxal: ensaios sobre a sociedade de hiperconsumo (The paradoxical happiness: Essay on hyperconsumption Society). São Paulo, Brazil: Companhia das Letras.

Maurer, B. (2014). Postscript: is there money in credit?. Consumption Markets and Culture, 17(5), 512-518. https://doi.org/10.1080/10253866.2013.850037

Monieson, D. D. (1981), "What constitutes usable knowledge in macromarketing*?,"* Journal of Macromarketing, 1(1), 14-22. https://doi.org/10.1177/0276146781001001

Monieson, D. D. (1989), "Intellectualization in macromarketing revisited: a reply to Hunt," Journal of Macromarketing, 9(2), 11-16. https://doi.org/10.1177/0276146789009002

Omowole, B. M., Urefe, O., Mokogwu, C., and Ewim, S. E. (2024), "Integrating fintech and innovation in microfinance: Transforming credit accessibility for small businesses," International Journal of Frontline Research and Reviews, 3 (1), 90-100. https://doi.org/10.56355/ijfrr.2024.3.1.0032

Ramanauskas, T., Matkenaite, S., and Rutkauskas, V. (2018), "Credit and money creation from the integrated accounts perspective," Bank of Lithuania Discussion Paper Series 5, Bank of Lithuania. Research Papers in Economics. Available in: https://ideas.repec.org/p/lie/dpaper/5.html

Shao, L. P., McKinney, R. E., and Shao, D. H. (2012). Purchasing power of credit, social mobility, and economic mobility. Available in: https://mds.marshall.edu/mgmt_faculty/116/

Singh, P., Dave, T., and Joshi, A. B. (2024), "Moderating role of digital consumer protection in impacting the intention to use digital financial services," International Review of Management and Marketing*, 14(5),* 222-234. https://doi.org/10.32479/irmm.16842

Tadajewski, M. (2010). Towards a history of critical marketing studies. *Journal of Marketing Management, 26(9-10),* 773-824. https://doi.org/10.1080/02672571003668954

Turunen, E. and Hiilamo, H. (2014), "Health effects of indebtedness: a systematic review," BMC public health, 14, 1-8.

Venkatesh, A. (1999), "Postmodernism Perspectives for Macromarketing: An Inquiry into the Global Information and Sign Economy," Journal of Macromarketing, 19 (2), 153-169. https://doi.org/10.1177/0276146799192006

Dark Sides of Financial Inclusion: Examining the Buy Now, Pay Later (BNPL) Industry through the Lens of the Integrative Justice Model (IJM)

Neleen Leslie Piper

Ficawoyi Donou-Adonsou

Tina Facca Meiss

Introduction

Financial technology (fintech) innovations have redefined access to credit and financial services, promising increased financial inclusion for underserved populations. Buy Now, Pay Later (BNPL) services exemplify this shift, offering consumers an alternative to traditional credit with flexible installment payments. Marketed as a democratizing force in financial access, BNPL services have gained widespread adoption, particularly among younger and lower-income consumers who may lack access to conventional credit products (Stavins 2024). Companies such as Afterpay, Klarna, Affirm, and Zip have capitalized on shifting consumer preferences and the rapid expansion of e-commerce, positioning BNPL as a modern credit solution (Aalders 2022; Kumar, Salo, and Bezawada 2024).

However, BNPL's implications for financial inclusion are complex. While these services enable increased purchasing power and potential credit-building opportunities, concerns have emerged regarding consumer over-indebtedness, opaque fee structures, and regulatory gaps (CFPB 2022). The lack of stringent oversight compared to traditional credit products raises ethical concerns about consumer protection and financial well-being (Lux and Epps 2022).

To assess BNPL's role in financial inclusion from an ethical and justice-oriented perspective, this study employs the Integrative Justice Model (IJM) (Santos and Laczniak 2009; Kaefer, Luz Mora and Santos 2024). The IJM offers a normative-ethical framework that evaluates market practices based on five key principles: authentic engagement with non-exploitative intent, co-creation of value, investment in future consumption, interest representation of all stakeholders, and long-term profit management. Applying IJM to BNPL enables a critical assessment of whether these services align with principles of socially responsible fintech, ensuring fair and just financial inclusion efforts.

This study builds upon the broader literature of Socially Responsible Marketing (SRM), which advocates for corporate citizenship, stakeholder orientation, and social/ecological sustainability as foundational principles for ethical marketing (Laczniak and Shultz 2021). A

socially responsible approach to fintech should move beyond profit maximization to embrace distributive justice and constructive engagement, ensuring financial products serve the common good (Laczniak and Murphy 2018).

The study is guided by three central questions:

1. How does BNPL affect access to credit for unbanked and underbanked populations?
2. What are the implications of BNPL for consumer financial behaviors and long-term creditworthiness?
3. What are the long-term implications of BNPL for consumer wellbeing?

Firstly, we present an analysis of BNPL usage and its consequences among American consumers using survey data collected by Prosper Insights and Analytics. In our analysis we examine BNPL usage's direct and indirect impact on social media buy now button usage, splurge purchasing and luxury brand purchasing, debt accumulation, financial security and consumer happiness. Secondly, we explore the ethical implications of these findings using the IJM. By analyzing BNPL through the IJM framework and grounding the discussion in socially responsible marketing (SRM), this study contributes to the macromarketing discourse on fintech ethics, financial empowerment, and consumer protection within emerging financial ecosystems. It also builds upon the work of Kaefer, Luz Mora and Santos (2024), who previously proposed guidelines for the ethical development of fintech, using the IJM. Our analysis illustrates the impact of a specific consumer focused fintech product and highlights the need for changes in the current industry structure and makes specific recommendations for the BNPL industry.

Literature Review

Financial Inclusion and Fintech: A Macromarketing Perspective

Financial inclusion, defined as access to essential financial services such as credit, savings, and insurance, is widely recognized as a driver of economic growth and poverty alleviation (Demirgüç-Kunt et al. 2018). Digital financial services, particularly fintech innovations, have expanded financial access by lowering barriers related to cost, geography, and financial literacy. The World Bank (2022) emphasizes that financial inclusion fosters economic participation, entrepreneurship, and household stability, particularly for marginalized populations.

Fintech solutions such as BNPL are often heralded as a mechanism for improving financial inclusion. By offering near-instant credit with minimal credit checks, BNPL services appeal to

consumers who may lack access to traditional lending due to insufficient credit histories or systemic financial exclusion (Stavins 2024; CFPB 2025). The seamless integration of BNPL with e-commerce platforms further facilitates participation in the digital economy. However, the ease of access and lack of stringent credit assessments pose risks, particularly for financially vulnerable consumers who may struggle with debt accumulation.

Buy Now, Pay Later and Financial Inclusion: Promise and Peril

BNPL services have emerged as a disruptive force in consumer finance, with projections indicating continued market growth at a compound annual growth rate of 26.1% through 2030 (Grand View Research, n.d.). The behavioral economics concept of mental accounting (Thaler 1985) helps explain BNPL's appeal: by breaking payments into smaller, manageable installments, consumers perceive purchases as more affordable, reducing psychological barriers to spending. However, this same framing can contribute to excessive borrowing and financial instability, particularly if consumers underestimate the cumulative burden of multiple BNPL obligations. The Consumer Financial Protection Bureau (CFPB) (2022) reported that 43% of BNPL users missed at least one payment, leading to late fees and penalties. Recent studies have also found relationships between BNPL use and impulsive buying behavior (Ah Fook and McNeil 2020; Susanto et al. 2024).

While BNPL may provide an alternative pathway to credit access, critics argue that its unregulated nature exacerbates financial vulnerabilities. Moreover, the lack of clear reporting mechanisms to credit bureaus means that responsible BNPL use does not necessarily contribute to positive credit histories, limiting its potential benefits for financial inclusion.

The Integrative Justice Model (IJM) and Socially Responsible Fintech

To evaluate BNPL within an ethical framework, this study draws upon the Integrative Justice Model (IJM) (Santos and Laczniak 2009; Kaefer, Luz Mora, and Santos 2024). Kaefaer, Luz Mora and Santos (2024) applied the IJM to socially responsible fintech and provided a normative structure for assessing fairness and justice in market exchanges, particularly for vulnerable consumers. It consists of five principles:

1. Authentic Engagement with Non-Exploitative Intent: BNPL providers should engage with consumers in a transparent and ethical manner, ensuring that services do not exploit financial vulnerabilities. This principle challenges the aggressive marketing tactics often used to promote BNPL as a risk-free payment option.

2. Co-Creation of Value: Ethical BNPL models should involve consumers in the design of responsible lending practices, incorporating user feedback to enhance financial well-being rather than simply maximizing transaction volume.

3. Investment in Future Consumption: BNPL services should promote long-term financial health, integrating financial education and literacy initiatives to support informed borrowing decisions.

4. Interest Representation of All Stakeholders: Regulators, consumer advocacy groups, and fintech providers must collaborate to establish fair lending standards that protect at-risk populations from predatory practices.

5. Long-Term Profit Management: Sustainable fintech practices should prioritize financial stability over short-term profit maximization, ensuring that BNPL services foster inclusion without encouraging unsustainable debt accumulation.

These principles align with Socially Responsible Marketing (SRM), which emphasizes corporate responsibility, sustainability, and stakeholder engagement (Laczniak and Shultz 2021). The SRM framework provides a macromarketing perspective that assesses BNPL's systemic effects, ensuring that fintech innovations contribute to economic well-being rather than financial harm.

Gaps in the Literature and Research Contributions

Despite growing interest in BNPL and financial inclusion, gaps remain in understanding the long-term effects of BNPL on financial behavior, credit building, and economic mobility. Existing research primarily examines consumer adoption and repayment behaviors (Kumar, Salo, and Bezawada 2024), with limited attention to differential impacts across demographic groups, regulatory responses, and ethical considerations.

By integrating IJM and SRM, this study extends the literature on fintech ethics, macromarketing, and consumer financial well-being. It contributes to the growing discourse on constructive engagement, distributive justice, and the social contract of financial services (Laczniak and Murphy 2018), advocating for regulatory frameworks and ethical fintech innovations that promote true financial empowerment.

Proposed Model and Hypotheses

In this study, we propose that BNPL is an enabler of impulsive, nonessential consumption online, specifically on social media. Online retailers who advertise on social media platforms,

often offer BNPL financing at the point of purchase, allowing consumers to secure credit and finalize transactions in a matter of minutes. We hypothesize that this will have a cascading effect, allowing consumers to engage in more "spur of the moment" purchases, including products. We further propose that this type of purchasing behavior will ultimately increase their debt levels and negatively impact their financial wellbeing and happiness. As such, we have proposed the following hypotheses:

H_1: Frequency BNPL use has direct effects on frequency of social media buy now button usage, splurge purchasing and luxury brand consumption.

H_2: Frequency of BNPL usage has significant direct and indirect effects on credit card debt and financial security.

H_3: Frequency of BNPL usage has a significant indirect effect on consumer happiness.

H_4: The direct and indirect effects of BNPL usage are significantly higher among consumers living in poverty.

The proposed model of the relationships among the variables are presented in figure 1.

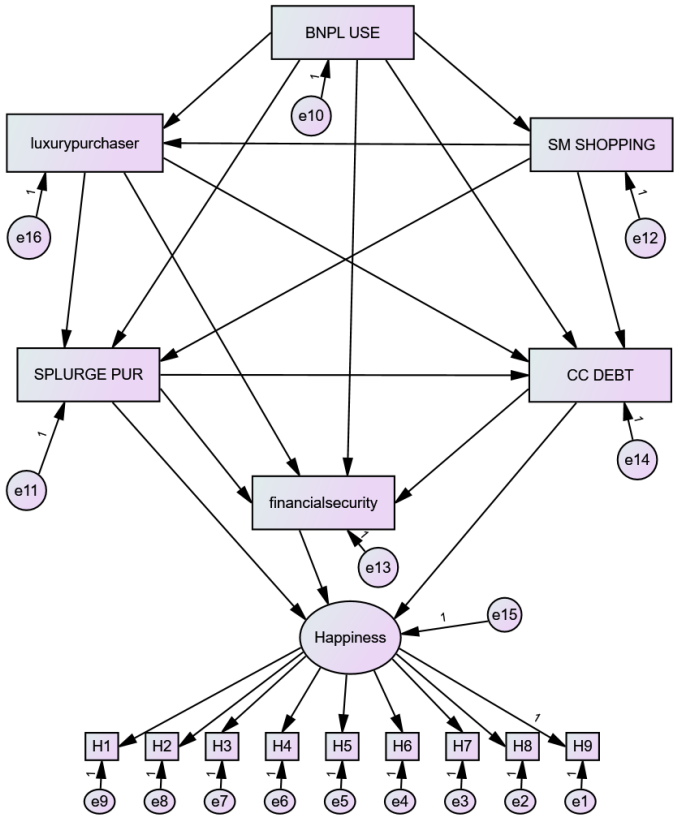


Figure 1 - Proposed Model of BNPL Impact on Happiness

Data and Methodology

Data

The data for this analysis was collected by Prosper Insights and Analytics in Worthington, Ohio in December 2024 as part of their monthly national Consumer Actions and Intentions study that they have been conducting since 2002. However, collection of data on BNPL usage did not begin until June 2021. Prosper's zero-party data approach aligns with both CCPA and HIPAA regulations. Survey respondents were recruited through opt-in consumer research panel providers and directed to Prosper's online survey platform to complete the survey. Participation in this survey was voluntary, and participants were instructed to skip any questions that they did not feel comfortable answering or did not know the answer to. All survey responses were anonymous and no personally identifying information was collected. The survey sample comprises adults 18 and older and was balanced according to age and gender to reflect the composition of the U.S. population. The margin of error is less than 1.1 percent.

Measures

Frequency of BNPL Use: Participants were asked whether they used BNPL services. The response options were (1) never, (2) occasionally, and (3) regularly. These responses allowed the researchers to operationalize frequency of BNPL usage.

Social Media Buy Now Button Usage: Participants were asked how often they used the "shop now" button to purchase products advertised on five social media platforms: Facebook, Instagram, Pinterest, Snapchat and TikTok. The response options were (1) never, (2) occasionally, and (3) regularly. A summed social media buy now button usage score was created using these scores.

Splurge Purchasing: Participants were asked to indicate if they felt that have been making more splurge type purchases than they have in the past. They were provided with 24 products categories and were asked to select all categories in which they have made splurge purchases. The resulting yes/no binary variables were used to create a summed score to indicate number of categories in which they made splurge purchases.

Luxury Purchasing: Participants were presented with a list of 40 brands, 17 of which were luxury brands and were asked if they had purchased any of those brands in the past 60 days. The resulting yes/no binary variables were used to create a summed score to indicate number of luxury brands they had purchased in the past 60 days.

Poverty: Household income, marital status, and number of children were used to classify participants as living above or below federal poverty lines based on the Department of Health and Human Services (HHS) 2024 Federal Poverty Guidelines[5]. For participants who reported being married or living with someone, it was assumed that there were two adults living in the household. This number was added to the number of children in the household to calculate household size. For participants who were single, divorced, separated or widowed, it was assumed that there was one adult living in the household and this number was added to the number of children in the household to compute the household size. It should be noted, however, that the estimates of household size are conservative, as the question only allowed participants to select 0-5 or more children. The estimate of household size also does not capture multigenerational households that may also include grandparents and other extended family. Secondly, the measurement increments for the household income variable did not perfectly align with the HHS income cutoffs for each household size. We were still able to use these variables to compute the poverty line, but this is a conservative estimate. It is possible that there are participants who, based on the Federal Poverty Guidelines, would be classified as living below the poverty line but were not classified as such due to the considerations noted above.

Debt Accumulation (Credit Card Debt): Participants were asked to indicate their credit card debt levels from options starting at $1- $2,500 to $20,000+. Participants who had no credit card debt could also select $0. We excluded participants who held over $20,000 in credit card from our analysis to maintain consistent increments in measurement of credit card debt. As a result, we were able to maintain $2,500 increments for each unit of credit card debt.

Financial Security: Respondents were asked to rate their financial security on a scale of 1-5 from very insecure/financially vulnerable (1) to very secure/financially stable (5).

Happiness: Ten Likert-type questions inspired by Lee et al. (2002) and Stighlitz, Sen and Fitoussi's (2009) work on consumer well-being were also included in this study. Items included in the happiness index are outlined in table 1 below.

Happiness	
On a scale of 1-5 with 5 being "Totally Happy" how would you rate your happiness level on each of the following	
Your health (H1)	Your religion/faith (H6)

[5] https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines

Your relationships with family (H2)	Your work life (H7)
Your relationships with friends (H3)	Your house/apartment/condo (H8)
Your love life (H4)	Your neighborhood (H9)
Your home life (H5)	Your government (H10)

Table 1 - Items measuring happiness

Preliminary Results

Consumer Happiness Reliability and Validity

Of the 10 proposed items for the consumer happiness measure, one item (H10) was removed due to low factor loadings (< .50). Construct Reliability was assessed using Cronbach's Alpha and Composite Reliability. Cronbach Alpha was 0.90 which is over the required limited of .70 (Nunnally and Bernstein, 1994) and the composite reliability was 0.90, which is above the 0.70 benchmark (Hair et al., 2010). Hence, construct reliability was established for happiness. Convergent validity was estimated using Average Variance extracted (Fornell & Larcker,1981). The average variance-extracted was 0.51, and displays adequate convergent validity (Fornell & Larcker,1981).

Overall Model Results

A structural equation model generated through AMOS was used to test the relationships among the variables in the model. A good-fitting model was accepted if the value of the CMIN/df, the goodness-of-fit (GFI) indices (Hair et al., 2010); the Tucker and Lewis (1973) index (TLI); the Confirmatory fit index (CFI) (Bentler, 1990) is $\geqslant$ 0.90 (Hair et al., 2010). In addition, an adequate-fitting model was accepted if the AMOS computed value of the standardized root mean square residual (SRMR) < 0.05, and the root mean square error approximation (RMSEA) is between 0.05 and 0.08 (Hair et al., 2010). While the CMIN/df (30.432) was outside acceptable range, all other fit indices for the model fell within the acceptable range: the goodness-of-fit (GFI) =0.947, TLI =0.911, CFI =0.931, SRMR =.0399, and RMSEA =0.069. Given that the sample size for this model was large (6,157) and the chi square statistic is sensitive to large sample size, the other fit statistics were accepted as indicators that the model fit the data well.

The results indicated significant positive direct effects of frequency of BNPL usage on social media buy now button usage (b=0.514; p<.001); luxury consumption (b=0.215; p<.001);

splurge purchasing (b=0.141; p<.001) and credit card debt (b= 0.215; p<.001)., which supports H_1 and H_2. Results also showed significant negative direct effect of frequency of BNPL usage on financial security (b=-0.156; p<.001).

Social media buy now button usage and significantly mediated the effect of BNPL use frequency on luxury brand purchasing (b=0.312; p<.001) and luxury brand purchasing significantly mediated the effect of BNPL use frequency on splurge purchasing (b=0.103; p<.001). Furthermore, frequency of BNPL usage significantly had significant indirect effect credit card debt, financial security and consumer happiness through social media shopping, splurge purchasing, credit card debt, financial security and consumer happiness. Preliminary model results are presented in table 2 below.

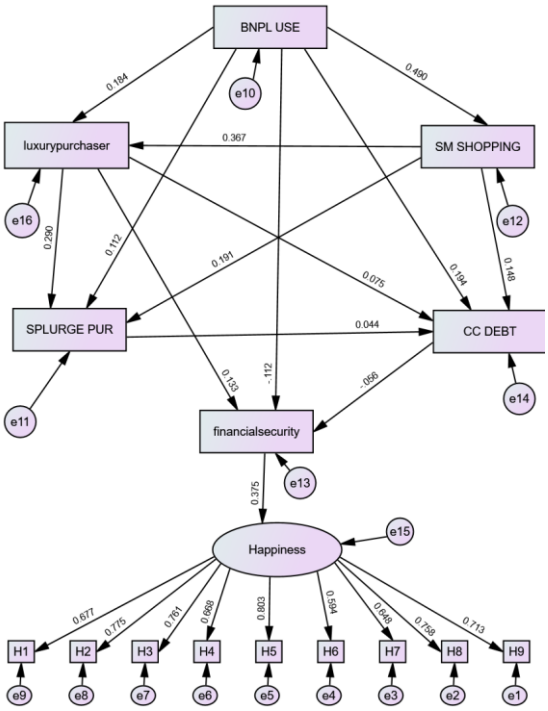


Figure 2 - CFA Model Results

Next Steps

The next step of our analysis will be a comparison of this model between consumers living above and below the federal poverty line. We will also compare BNPL usage between the banked and unbanked.

Discussion

The results of this study demonstrate the direct and indirect effects of frequency of BNPL use on online purchasing, impulse purchasing, debt accumulation, financial security and

consumer happiness. Given these findings, it is clear that the current BNPL industry, is unlikely to be positively transformative for low-income customers. What is probable, based on our findings is increased non-essential consumption that increases consumers debt levels and decreases their future creditworthiness.

From the perspective of the IJM, there are a number of points of note:

1. *Authentic Engagement with Non-Exploitative Intent:* As shown in our results, BNPL has a significant impact on social media buy now button usage, splurge purchasing and luxury brand purchase. BNPL loans are offered at the point of purchase, giving consumers the opportunity to make purchases they would otherwise be unable to afford. In these transactions they have very little time to conduct detailed evaluations of the offerings or to fully consider the consequences of their purchase decision. Lack of transparency regarding fees levied on missed or returned payments creates opportunities for exploitation of consumers to take place.

2. *Co-Creation of Value:* There are opportunities for greater collaboration among stakeholders in the industry. Currently, very few BNPL lenders report to credit bureaus, or share information among themselves. Greater collaboration is required among both traditional and BNPL lenders.

3. Investment in Future Consumption: The current structure of the BNPL industry results in asymmetric information, which prevents users from being fully informed users of their services. Rather than investing in future consumption, the current structure of the industry makes future *dependence* a more likely outcome, that traps consumers in a cycle of BNPL debt.

4. *Interest Representation of All Stakeholders:* Current laws are insufficient to regulate the BNPL industry. Industry players have advocated for self-regulation through codes of conduct. However, there are no clear mechanisms for consumer's interests to be represented in the current framework. A public-private partnership that combines regulation and clear industry standards is needed to ensure adequate representation of all stakeholders and to protect the rights of consumers.

5. *Long-Term Profit Management:* While Kaefer, Luz Mora and Santos (2024) have advocated for sustainable fintech practices that prioritize financial stability over short-term profit maximization, the BNPL industry does not meet that criterion. Without reforms, there will be negative consequences for both customers and lenders.

References

Aalders, R. (2023), Buy now, pay later: redefining indebted users as responsible consumers. Information, Communication & Society, 26(5), 941-956.

Bentler, P. M. (1990). "Comparative fit indexes in structural models." Psychological Bulletin, 107(2), 238–246. https://doi.org/10.1037/0033-2909.107.2.238

Consumer Financial Protection Bureau (CFPB), (2022). Buy Now, Pay Later: Market trends and consumer impacts. Retrieved from CFPB.gov

Consumer Financial Protection Bureau (CFPB), (2025). Consumer Use of Buy Now, Pay Later and Other Unsecured Debt. Available at https://www.consumerfinance.gov/data-research/research-reports/consumer-use-of-buy-now-pay-later-and-other-unsecured-debt/

Demirgüç-Kunt, A., Klapper, L., Singer, D., Ansar, S., and Hess, J. (2018), The Global Findex Database 2017: Measuring Financial Inclusion and the Fintech Revolution. Washington, DC: World Bank.

Fornell, Claes, and David F. Larcker. (1981) "Evaluating Structural Equation Models with Unobservable Variables and Measurement Error." Journal of Marketing Research, 18(1) 39–50. https://doi.org/10.2307/3151312.

Grand View Research. (n. d.). Buy Now Pay Later Market Size, Share & Trends Analysis Report By Channel (Online, POS), By End-use (Retail, Automotive), By Enterprise Size, By Region, And Segment Forecasts, 2023–2030. Available at https://www.grandviewresearch.com/industry-analysis/buy-now-pay-later-market-report#

Hair, J.F., Black, W.C., Babin, B.J. and Anderson, R.E. (2010). Multivariate Data Analysis. 7th Edition, Pearson, New York.

Kaefer, Frederick, Guillermina Luz Mora and Nicholas J.C. Santos (2024), "Socially Responsible Fintech Using Open Social Innovation." Journal of Macromarketing, 45(1), 105-112.

Kumar, A., Salo, J., and Bezawada, R. (2024), "The effects of buy now, pay later (BNPL) on customers' online purchase behavior." Journal of Retailing, 100(4), 602-617.

Laczniak, Gene R. and Clifford Shultz (2021), "Toward a Doctrine of Socially Responsible Marketing (SRM): A Macro and Normative-Ethical Perspective," Journal of Macromarketing, 41(2), 201-231.

Lee, D. J., Sirgy, M. J., Larsen, V., and Wright, N. D. (2002). “Developing a Subjective Measure of Consumer Well-Being.” Journal of Macromarketing, 22(2), 158–169.

Lux, M., & Epps, B. (2022). Grow Now, Regulate Later? Regulation urgently needed to support transparency and sustainable growth for Buy-Now, Pay-Later. M-RCBG Associate Working Paper Series.

Santos, Nicholas JC, and Gene R. Laczniak. (2009). “Marketing to the poor: An integrative justice model for engaging impoverished market segments.” Journal of Public Policy & Marketing 28(1)3-15.

Stavins, J. (2024). “Buy Now, Pay Later: Who Uses It and Why.” Federal Reserve Bank of Boston Current Policy Perspectives No. 24-3. Available at https://www.bostonfed.org/publications/current-policy-perspectives/2024/buy-now-pay-later-who-uses-it-why.aspx

Stiglitz, J. E., Sen, A., &and Fitoussi, J.-P. (2009). “Report by the Commission on the Measurement of Economic Performance and Social Progress.” www.stiglitz-sen-fitoussi.fr

Thaler, R. H. (1985). “Mental Accounting and Consumer Choice.” Marketing Science, 4(3), 199-214.

Tucker, L. R., and Lewis, C. (1973). “A reliability coefficient for maximum likelihood factor analysis.” Psychometrika, 38(1), 1–10. https://doi.org/10.1007/BF02291170

World Bank. (2022). Financial Inclusion Overview. Retrieved from https://www.worldbank.org/en/topic/financialinclusion/overview

Degrowth, Post-Growth, and Equitable Growth: Unsustainable Marketing Practices at the End of a Quarter Century

Alberto Henriques de Araújo Pereira

Renata Andreoni Barboza

What marketing practices could be linked to the growth ideology at the end of a quarter century (2025)? Which of these could be deemed (considered) unsustainable?

Annual model launching, excessive market segmentation, unreflective product differentiation, and planned product obsolescence are unsustainable mainstream marketing practices that were extensively observed in the premium smartphone market of Brazil in the period 2023-2024 (Pereira 2024). The research led to the conclusion that, paradoxically, such mainstream practices destroy value and harm marketing relationships in the medium and long run (Pereira 2024). Despite those shortcomings, the practices continue in the market, justified at the cultural-ideological level and by financial markets.

Furthermore, from a Macromarketing perspective, associated to the degrowth movement, these unsustainable practices ought to be challenged before it is too late. Effectively, more than fifty years have passed since

"the original Limits to Growth (1972) study used systems dynamics modeling to conclude that 'if the present growth trends in world population, industrialization, pollution, food product, and resource depletion continue unchanged, the limits to growth on this planet will be reached sometime within the next 100 years'" (Meadows et al. 1972 apud Bishop and Hines 2012, p. 65).

In accordance to that estimate, approximately fifty years are left before those growth limits will be reached. Gorz (1980) emphasized that to conserve the available resources for future generations, we must consume less and less. Kallis, Demaria, and D'Alisa (2015) support this notion of urgency in the preservation of resources. Although the topic had been brought since the mid 70's, the first international conference on the subject of degrowth and the prospect of a more sustainable and just society was held in Paris, 2008, according to Flipo and Schneider (2015).

To "articulate a self-reflexive and critical discourse" (Skålén et al. 2008) in Marketing, it is imperative that a "beyond-consumerist culture"[6] (Helfrich and Bollier 2015, p. 77) challenge the

[6] Degrowth helps us to understand the urgency of getting out of the "iron prison of consumerism," while commoning shows what a "beyond-consumerist-culture" looks and feels like.

mainstream marketing practices at the macro cultural level. Such practices are connected to the growth ideology of the system paradigm, neoliberal capitalism. At such aggregate levels, ideology also impacts business ethics.

The macro reflects and continues at the micro level, i.e., the organizations, particularly enterprises. The *ETHOS* of 'shareholder primacy' continues to be centered around the objectives of efficiency, productivity, earnings, and return margins. All the while, the primacy of the stakeholder remains set aside. At the same time, the lemma of growth remains hegemonic both at the level of discourse and practice. Despite the ESG (Environmental, Social and Governance) agenda, it is observable that the criteria of Corporate Finance continue to dictate which goals are more important than others. Here, profits surpass equity.

Capital and financial markets utilize metrics that stress growth: sales growth, profit growth, and market-share growth, among other indicators[7]. In many circumstances, such criteria are cultivated in an unreflective and automatic mode, putting a heavy burden on administrators. Consequently, the above burden propagates through marketing practices conducted by marketers inside and outside businesses and corporations. Thoughtless goals lead to non-reflective practices, which, in turn, reinforce the excesses in the consumer-culture status quo. Since the Journal of Macromarketing states that "Macromarketing represents the interaction among markets, marketing, and society", it could be inferred that society suffers when marketing ignores warnings not heard by the markets. In this case, marketing practices are ignoring early signals sent by market tendencies like the recent drop in sales experienced by Apple iPhone 16.

So, why do we consider such mainstream practices - product differentiation, market segmentation, planned obsolescence, and annual model launching - unsustainable?

Because these marketing practices are summed up at the macro level, they lead to unnecessary resource overconsumption and, in the medium run, to the overshooting of Nature's biophysical limits. In The 30-Year Update of The Limits to Growth, Meadows et al. (2004) estimated that the planet is perhaps 20% above the limit of sustainable carrying capacity (Bishop and Hines 2012).

At the same time, such marketing practices do not contribute to a better life, nor do they contribute to the individuals who thoughtlessly adhere to the annual modeling of consuming and

[7] Above all, when it comes down to companies' valuations, there is a strong tendency to put present value on future growth perspectives.

discarding. In support of this sentence, Shankar, Whittaker, and Fitchett (2006) used the term "miserable rich" to refer to those who, despite all the accumulation, remain frustrated ("heaven knows how I'm miserable now"). Alvesson (2013) alluded to the idea that economic development leads to "the interactive dynamics of positional goods, grandiosity, and illusion tricks" in his The Triumph of Emptiness (2013, p. 23).

Furthermore, "the logic of growth is dominant in the contemporary political economy and in various notions of social and cultural prosperity" (Chatzidakis et al. 2014, p. 753). They quote Castoriadis, for whom "the fetishism of growth is broader than the fetishism of GDP[8] and has deep structural political-economic and cultural roots" interconnected at the macro level (Castoriadis apud Chatzidakis et al. 2014, p. 753).

Excessive consumption also does not contribute to the collectivity in which overconsumption occurs. Over-tourism is an example of aggregate behavior leading to the critical overshooting of natural and social capacities. Milano et al. (2019) define it as a rapidly evolving phenomenon, characterizing excessive visitation to destinations associated with tourist commodities. Thus, the 'commoditization' of cultural and architectural sites imposes a heavy burden on inhabitants, who fall victim to uncontrolled growth tourism strategies.

To illustrate our idea about the unsustainability of such marketing practices, we present an example of the behavior of marketers and suppliers in a specific local market: the Brazilian premium smartphone market (Pereira 2024). The results led us to conclude that, currently, there is a set of such practices that are lenient and affiliated with the Macromarketing ideology of growth and overconsumption.

The research (Pereira 2024) was based on the reflective method, where the *focii* are interpretation, reflection, metatheoretical understanding, self-criticism, intersubjectivity, language analysis, and recognition of cultural, ideological, and political contexts. The method required numerous back-and-forths between theory and empirical observation and

[8] In order to help promote the degrowth, our practices need to be radically different. To begin with, we should reflect upon how we measure Gross Domestic Product (GDP), which is the *value* (measured in terms of the prices of) all *final* goods and services produced in one country within a given period. The usual time reference is the year, i.e., usually, the most important measure of GDP pertains to the annual production and offer of final goods and services within the economy.

Therefore, there is a problem with measuring economic growth, whether at the micro or macro level. This misguided way of measuring things leads to various evils, including forcing a type of measurement of what can be considered economic growth. Thus, only what is produced for the first time or provided at a certain price is considered growth.

documentary analysis of the cell phone market in Brazil. Such back-and-forths were mediated by reflection and interpretation, both of the theory consulted and of the observed reality.

During the research, it was found that such practices were detrimental to the very consumers who wanted to exhibit the goods and services bought because they took value away from consumers. The research concluded that the launching of annual models destroys value (Pereira 2024). For instance, a consumer who has just bought a top premium smartphone in 2023 faces a sudden loss of value when the company launches a campaign for next year's model within the second semester of 2023. One of the research conclusions was that such practices not only cause a loss of value in marketing relationships but also erode trust and loyalty (Pereira 2024).

So, why are companies and marketers still worshiping practices created in the 1950´s[9] as marketing strategies (Jones et al. 2005)? What animates (inspires) such cultural behavior of accumulation of commodities (Featherstone 1990)? O'Connor (2010) wrote the following about the anima of capitalism:

"Capitalism is animated by the principle of unlimited accumulation at the expense of all other values" (O'Connor 2010, p. 9).

The track chairs initially stated the panel's lead evoking environmental crises and socio-economic inequalities: "In the face of escalating environmental crises and socio-economic inequalities, scholars and practitioners alike are reconsidering the traditional focus on (economic) growth" (Vicdam, Nikula, and Beninger 2025, p. 17). In other words, should economic growth still be a significant eligible goal for our societies? Alternatively, should it be viewed as a lemma serving an ideology (neoliberal capitalism)?

According to Klikauer (2013), "ideologies are used to engineer complacency and compliance so that the victims of ideological socialization do not rebel but support the given ideology (Scott and Hart 1991, p. 41 apud Klikauer 2013)". When a person seeks to acquire the next model of a premium smartphone, even though she has the latest model, she complies with offerings based upon marketing strategies both anachronic and unsustainable.

That is precisely what is going on with marketing practices nowadays. They solemnly abide by the ideology of accumulation as a form of self-realization. Consumerism is the higher form of

[9] "Wendell Smith's (1956) notion of 'product differentiation and market segmentation as alternative marketing strategies'" (Jones et al. 2003, p.43).

materialism in which growth justifies significant differences in wealth accumulation, distribution of income, and unacceptable social divide.

Here (in Brazil) and abroad, launching annual models is among the marketing practices that no longer make sense today because it destroys value – exchange and relationship value (Pereira 2024) – and brings the limits of growth even closer. In the Brazilian cell phone market, the three leading cell phone manufacturers by market share (Samsung, Motorola, and Apple) adopt the marketing practice of launching annual models in the period 2023-2024.

Often, the launch of next year's model campaign occurs just months after the launch of this year's model. In other words, the supplier anticipates a campaign announcing the probable characteristics of the next annual model during the second semester. If a person has just spent thousands of Reais (Brazil's currency) on the current year's model, she will see the exchange value of her new top smartphone drop considerably because of the anticipation of next model's features. For, indeed, a marketing campaign is already on the air praising the following year's model, which implies a clear downgrading of the previous choice.

In the so-called premium segments, whether the devices at the top of the market or the devices that make up the premium intermediate segment, this practice is interpreted literally by the suppliers, their managers, and marketers as if it were a socio-economic and productive dogma. No matter how significant the technological advances in handset functionality have been, new models will be launched every year for the following year. It's as if there were no limits to this practice, even in the face of functional advances that are merely incremental and of little relevance to differentiating the models from one year to the next. Sometimes, it is even observed that, in the eagerness to offer new annual models, a new model leaves behind a better feature in favor of a questionable or even worse one contained in the new device. This phenomenon has been recurrent concerning the quality of cameras in top-of-the-line devices, especially regarding the reliability with which photos reproduce natural colors.

Launching annual models produces aberrations such as the extravagant numbering of models by product line, as seen in Motorola and Samsung's cases. Apple has mistakenly adhered to this strategy, attaching numbers to the annual models, which are already number 16, and differentiating models in the same line even by additional adjectives and letters.

In sum, in addition to being anachronistic, launching annual models violates a duty of conduct towards a global society, the planet, and Nature. It is one of the roots (Kilbourne 2019)

of the problem of marketing practices' ecological unsustainability. Breaking with the paradigm of annual models means transitioning from hyper-consumption to sustainable consumption (Kilbourne 2019, p. 99).

Having identified such practices, the research recommended a sustainability test (Pereira 2024). In this case, sustainability is seen both from the perspective of the impact on the continuity of the marketing relationships and the impact on the availability of the scarce natural resources used to produce the goods. The same logic applies to its twin practice, that of planning the premature obsolescence of the goods offered. So, if the marketing campaign does not pass the test of planned obsolescence, it contributes incrementally to the unsustainability of social and economic practices. Thus, it jeopardizes the legacy of better conditions that we must give future generations, regardless personal interests.

The research also revealed two twin practices in the premium (i.e., premia) segments of high-end and mid-range cell phones. These are the practices of thoughtless and unjustifiable product differentiation and excessive market segmentation. They are simultaneous and self-reinforcing, doubling their effects on consumers, who become confused, and on brands, which lose their identity. Both effects damage trust in marketing relationships and result in a loss of quality in relationships between people, brands, and suppliers.

Taking the concrete example the national (Brazil's) cell phone industry (market), this practice has been taken to the point where Motorola's launches are already reaching numbers like 65, 85, and 100 by the end of 2024, depending on the confusing differentiation and segmentation of market extracts, in an apparent loss of meaning (Pereira 2024). Similarly, Samsung's releases reached meaningless numbers such as A15, A25, A35, A54 or A55, M35, M55 and S23, among others, also by the end of 2024. Apple adhered to excessive product differentiation, abandoning one of the crucial elements that served as mortar for building and maintaining strong relationships with its consumers, the launch of just one model, whose prices differed only because of more or less (i.e., the quantity of) memory offered within the product (Pereira 2024).

This excess of numbers and specifications confuses people and makes choices much more difficult, according to the YouTubers specialized on the smartphone market who were directly observed during research (Pereira 2024). It takes quite an effort to discern all the subtle differences in specifications between the models and their prices.

Therefore, product differentiation is too a practice that should be the subject of deep reflection by everyone: academia, society, consumers, non-consumers, and those interested in a fairer, more sustainable, and harmonious planet. Differentiation involves the purposeful modification of products that are essentially the same or similar (in functional terms), with the explicit purpose of making people consider them preferable to other products. It should be noted that, in the case of this differentiation, we are not talking about products or services that may have partially antagonistic functionalities, such as tennis rackets designed for greater power or control, running shoes designed for more extraordinary performance or comfort, or durability, guitars more suited to jazz or rock, schools whose curricula are more conservative or more innovative. This is a false differentiation, which often results from the intentional substitution of higher-quality components for lower-quality elements, even if this substitution only minimally affects the margin between price and cost of production and supply.

Marketing practices affect the engineering of the products offered. The mistaken decision and practice of maintaining the annual launch of models is made viable because, at the engineering level, another significant harm to sustainability takes form: planned obsolescence, which, it should be added, is practiced daily. Obsolescence is planned into the products on offer to encourage premature abandonment and new consumption of products to be produced and offered shortly.

Finally, Pereira (2024) considered that the cloud of services surrounding cell phones was also contaminated by unsustainable marketing practices. Among such practices, the offering of free security packages for only one, two or three years stood out. Considering that the useful life of devices, from a hardware point of view, could reach five, six or even seven years, the above practice contributed to premature disposal of the products. Similarly, free updates to operating systems generally did not last more than three years. This decision also caused the premature loss of functionality of devices, leading to unnecessarily more frequent replacements and stressing the environmental gap.

In conclusion, it is stated that there are unsustainable marketing practices, identified by research in the Brazilian premium cell phone market, but which are common to various present markets. These are the practices of annual model launches associated with planned obsolecence, excessive market segmentation and thoughtless product differentiation, which together contribute to the rapid and unjustifiable depletion of the planet's natural resources.

References

Alvesson, Mats (2013) The Triumph of Emptiness: Consumption, Higher Education, and Work Organization. London: Oxford University Press.

Bishop, Peter, and Andy Hines (2012) Teaching about the Future. Hampshire (UK): Palgrave Macmillan.

Chatzidakis, Andreas, Gretchen Larsen, and Simon Bishop (2014) Farewell to consumerism: Countervailing logics of growth in consumption. Ephemera, volume 14(4): 753-764.

D'Alisa, Giacomo, Federico Demaria, and Giorgos Kallis (2015) Degrowth: A vocabulary for a new era. New York: Routledge.

Flipo, Fabrice and Francois Schneider (2015) Foreword to D'Alisa, Giacomo, Federico Demaria, and Giorgos Kallis, eds. Degrowth: A vocabulary for a new era. New York: Routledge.

Gorz, André (1980) Ecology as Politics. Boston, MA: South End Press. First published in 1977 as Écologie et liberté, Paris: Galilée.

Helfrich, Silke and David Bollier (2014) Commons. In D'Alisa, Giacomo, Federico Demaria, and Giorgos Kallis (2015) Degrowth: A vocabulary for a new era. New York: Routledge.

Jones, Brian, and Eric Shaw (2005) A history of marketing thought. Marketing Theory, vol. 5 (3), p. 239-281.

Kallis, Giorgios; Demaria, Federico and D'Alisa, Giacomo (2015) Introduction to D'Alisa, Giacomo, Federico Demaria, and Giorgos Kallis, eds. Degrowth: A vocabulary for a new era. New York: Routledge.

Kilbourne, William (2019) Critical macromarketing, sustainable marketing, and globalization. *In*: *The Routledge Companion to Critical Marketing*, p. 98-114.

Klikauer, Thomas (2013) What is Managerialism? *Critical Sociology*, vol. 0 (0), p. 1-17.

Meadows, Donella, Dennis Meadows, Jorgen Randers, and William Behrens III (1972) The Limits to Growth: a report for the Club of Rome's project on the predicament of mankind. New York: Universe Books.

Meadows, Donella, and Jorgen Randers, and Dennis Meadows (2004) The Limits to Growth: The 30-Year Update. London: Earthscan.

Milano, Claudio, Marina Novelli, and Joseph Cheer (2019) 'Overtourism and degrowth: a social movements perspective. *Journal of Sustainable Tourism*, 27 (12), 1857–1875. https://doi.org/10.1080/0966958 2.2019.1650054

O'Connor, Justin (2010) *The cultural and creative industries: a literature review, Creativity, Culture and Education*.

Pereira, Alberto (2024) Marketing do Bem: um roteiro analítico. Dissertation for the Masters of Management. Rio de Janeiro: IBMEC Rio – Centro Universitário Ibmec.

Skålén, Per, Martin Fougère, and Markus Felleson (2008) Marketing Discourse: a critical perspective. Milton Park: Routledge.

Shankar, Avi, Julie Whittaker, and James Fitchett (2006) Heaven knows I'm miserable now. Marketing Theory, Volume 6(4): 485-505.

Shove, Elizabeth, Matt Watson, and Mika Pantzar. "The dynamics of social practice: Everyday life and how it changes." (2012): 1-208.

Vicdam, Handan; Nikula, Pii-Tuulia, and Beninger, Stefanie. Degrowth, Post-Growth, and Equitabel Growth Track for the 50th Macromarketing Conference, 2025.

Dematerialization of Marketing Objects: A Narrative of Marketing History's Future

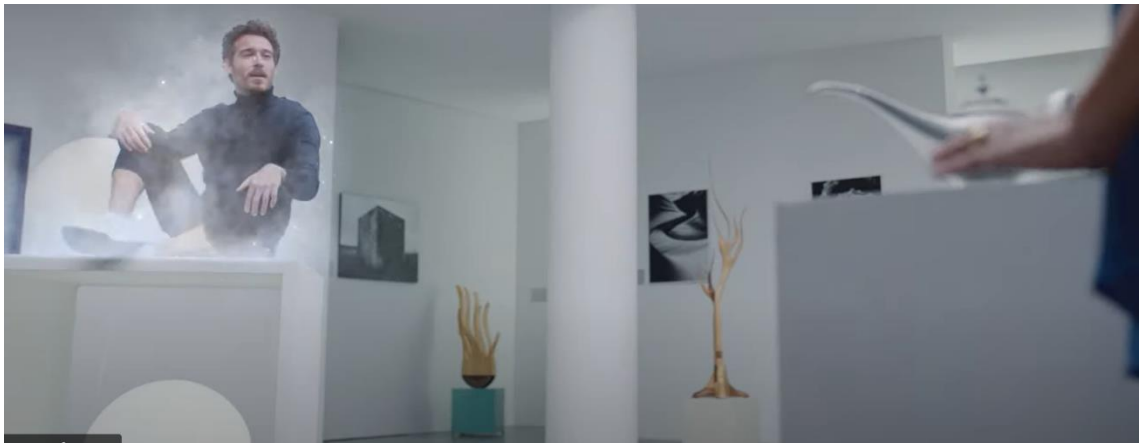
Alberto Henriques de Araújo Pereira

Renata Andreoni Barboza

Historical perspectives in Marketing depend on the choice of narrative, just as well as other historical accounts. We chose a particular path in this extended abstract, just like the poet (Robert Frost) did in 'The Road Not Taken'. That makes all the difference from other possible and more mainstream accounts of Marketing evolution. In our account, the surge of the Creative Economy in the Post-Industrial Era already demands marketers at the macro level a step (forward and) beyond usual forms of Service-Dominant Logic (SDL) or Service-Base Logic (S-BL) (concept devised by Vargo and Lusch 2004). It is a step towards a symbolic, cultural experience, very independent of tangible exchanges involving goods and services.

That way, over here, we foresee Marketing's future and consider it is already standing on a marble pedestal inside the Modern Art Museum of the Discipline (Marketing), parodying one of the latest commercials made by the Samsung team in Brazil, which features Artificial Intelligence (AI) marvelous features in the brand's smartphones observed in Figure 1:

Figure 1: AI Commercial from Samsung.



Source: Samsung.[10]

In this ad[11], Samsung AI evokes the frontiers of imagination[12], when a young woman enters what appears to be an exhibit in a modern museum. She comes across an Aladdin's lamp.

[10] Available at: https://adnews.com.br/samsung-transforma-inteligencia-artificial-em-genio-da-lampada/. Access 22 nov. 2024.

[11] Available at: https://adnews.com.br/samsung-transforma-inteligencia-artificial-em-genio-da-lampada/. Access 22 nov. 2024.

[12] Available at: https://news.samsung.com/br/samsung-transforma-galaxy-ai-em-genio-da-lampada-em-nova-campanha-da-marca . Access 25 nov. 2024.

When she rubs it, a genie in the form of a young man comes out and sits on one of the pillars of the exhibit. When the man appears, a dialogue takes place between the two youngsters. He tells the young woman that she is allowed three wishes, evoking the magical stories of Arab genies, the pure magic of life. Then, she first says that she has always wanted to know how to speak foreign languages. He shows the Samsung Galaxy Fold model, instantly translating what appears to be German into Portuguese. Second, she says that she has always wanted to know how to design clothes (i.e., fashion). He gives her the S Pen so she can sketch a woman's dress in rough lines on the open foldable phone. Immediately, some AI program turns the sketch into an image of a well-finished woman's dress, complete with slight variations. Third and finally, she expresses her desire to know anything in seconds. He gives her an S24 cell phone and circles a little-known word ('athleisure') with his finger, and Google immediately explains the evolution of that.

At the forefront of this new technological revolution, the supposed encounter between imagination and reality is promoted, that is, new experiences are provided through AI-enabled technology. In other words, the relationship in marketing is expanding towards new and unlimited frontiers. In fact, according to Samsung Brazil's Newsroom, Samsung's Artificial Intelligence (AI) offers "unlimited solutions" for an incredible range of practical problems:

Title: Samsung transforms Galaxy AI into a genie in a lamp in the brand's new campaign

Turning wishes into reality can be easier than you think with the use of Galaxy AI*, Samsung's Artificial Intelligence. This is the motto of the company's new campaign, which personifies the Galaxy AI in the famous mythical figure of the genie in the lamp to explore the connections and similarities between the technology and the legend.

The film, which has an irreverent, fun and playful approach, presents the Galaxy AI as a modern genie, demonstrating the ability of Artificial Intelligence to make people's lives easier by making everyday tasks simpler and more efficient. But just as the genie depends on a master to free it from the lamp, the Galaxy AI depends on users to explore its full potential.

The magic happens when the character visits an art gallery and comes across a friendly genie who grants her three wishes. She chooses to have the power to communicate in other languages, design clothes and learn information in seconds. The genie promptly grants her wishes using Samsung smartphones and Galaxy AI Artificial Intelligence features: the Interpreter1 on the Galaxy Z Flip6, the Drawing Assistant on the Galaxy Z Fold6, and Circle to Search2 on the Galaxy S24 FE.

"While the genie in the lamp grants a limited number of wishes, Galaxy AI offers unlimited solutions in an agile manner," says Lucia Bittar, Director of Mobile Experience Marketing at Samsung Brazil. "Our Artificial Intelligence is the result of a complex combination of technology, mathematics and algorithms very well applied to offer features that facilitate communication, make photos incredible and bring more productivity, while respecting ethical and safety limits," she explains.

The Era of Relationship Marketing: A narrative excerpt

Regarding the notion of relationship in Marketing, this theoretical framework begins with Gummesson (1987), who proposed a New Concept of Marketing (Gummesson 1987, p. 10, 12, 19, and 20), in which the emphasis of Marketing falls on relationships and interactions. According to the author, this emphasis resulted from the (then) new theories on service marketing but also came from "practical experience" (Gummesson 1987, p. 10). In short, his attention fell on the development of interactive relationships in the long term. Here, there are three key ideas to guide the framework that will underpin the analytical framework: the idea of relationship in marketing, the idea of interaction, and the idea of long-term.

Next, Grönroos (1994) advocated the adoption of a new paradigm in marketing, one that was based on building and managing relationships. The author argued in favor of a change of focus in the discipline, which, in his view, at the time, was guided mainly by a theoretical model focused on the concept of the marketing mix and the concepts of the 4Ps (product, price, place, promotion). According to him, these were the key variables of analysis for research, knowledge reproduction, and practice in marketing.

In other words, by definition the mix concept applies to any marketing situation without any exception: consumer marketing, B2B marketing, nonprofit marketing, service marketing, retail marketing, etc. The mix concept even applies by definition also to less traditional sub-fields such as e-marketing (Möller, 2006) and relationship marketing (Waterschoot and Foscht 2010, p. 190 apud Grönroos 1994*).*

However, Grönroos (1994) stated that one of the mainstream's analytical references, the marketing mix, including the 4 Ps, was nothing more than a "list of variables" (Grönross 1994, p. 349). Therefore, the author pointed out the fallacies (shortcomings) of using them to describe

marketing phenomena, which should help fulfill the paradigm proposed by the marketing concept.

Despite this conceptual evolution, Baker (2010) states that Grönross' (1994) notion of relationship is still linked to the notions of market, company, and profit:

Grönroos refers to his own (1990) definition of relationship marketing: 'Marketing is to establish, maintain and enhance relationships with customers and other partners, at a profit, so that the objectives of the parties involved are met. This is achieved by mutual exchange and fulfilment of promises' (Baker 2010, p. 17).

Gummesson (1987) could locate in the United States the context from which marketing theories on consumer goods emanated 'almost exclusively.' Citing his experience with European consultants, Gummesson (1987) states that the North American matrix theory forgot what was vital for Europeans. As for services, the author also states that companies' production has a dual nature, goods, and services, although in varying proportions depending on the business sector. Thus, by studying companies where the provision of services or supply to other companies (then called industrial marketing) was predominant, it would be possible to observe certain marketing facets more clearly and develop a more realistic theory of the Marketing Concept.

Vargo and Lusch (2004) contribute to the theory in the sense that value comes from the concept of service they adopt: a set of qualities associated with the expertise (specialized skills) of those who offer products and services.

Rather, we define services as the application of specialized competences (knowledge and skills) through deeds, processes, and performances for the benefit of another entity or the entity itself. Although our definition is compatible with narrower, more traditional definitions, we argue that it is more inclusive and that it captures the fundamental function of all business enterprises.) Thus, the service-centered dominant logic represents a reoriented philosophy that is applicable to all marketing offerings, including those that involve tangible output (goods) in the process of service provision (Vargo and Lusch 2004, p. 2).

In other words, Vargo and Lusch (2004) consider that, from the beginning of the century, the history of Marketing entered a new era, dominated by the complex notion of a service logic that can be extended to any marketing offering. From this conceptual moment onwards, offers of goods, such as cell phones, began to be seen no longer from the point of view of tangible products but rather from the perspective of abstraction: a product surrounded by a cloud of

services, which are responsible for assigning value to the whole, the product-service set. Skilled services enhance marketing relationships.

More than that, the service cloud – a real source of value – depends significantly on the skills and expertise of those behind the offering of the product's associated service package. The greater these talents and skills, the greater the value that can be developed through the relationship between supplier and demander. Co-creation itself is, in a way, conditioned by this power of innovation originating from the skills and expertise of those who offer the inseparable binomial of associated goods and services. This is what happens, for example, with the services offered by cell phone manufacturers, such as applications, subscriptions, and security packages, which is why the creative economy – especially what is called the creative industry – plays such an important role in this type of offering, because creativity is a source of innovation. Moreover, innovation was the basis for establishing a strong relationship between Apple and its customers until recently.

For all this and, perhaps more, Baker (2010, p. 18) states that, currently, relationship marketing is accepted as reflecting the essence of the marketing concept: "*Today, relationship marketing is widely accepted as reflecting the essence of the marketing concept*." Furthermore, Baker (2010, p. 23) defended the idea that, in essence, marketing is the process through which organizations facilitate exchanges through collaborative relationships that create mutual value.

It is my view that an emphasis on value as opposed to 'service' is more consistent with the original conceptualization of marketing as a philosophy of exchange focused upon 'mutually satisfying relationships'. This view is supported by a subsequent definition offered by Lusch and Vargo (2006) to the effect that 'marketing is the process in society and organisations that facilitates voluntary exchange through collaborative relationships that create reciprocal value through the application of complementary resources' (p. 5).

Tadajewski, Maclaran, Saren and Stern (2019) summarized the significance of Vargo and Lusch's (2004) contribution to Marketing theory, from a critical point of view, focused on the conceptual foundations of the discipline:

The Service Dominant Logic (SDL) approach is outlined by Steve Vargo and Robert Lusch (2004, 2006, 2008) in the next chapter. As a new contender for dominance in marketing theory, in a short time SDL has raised strong interest and discussion about theory development in marketing. The focus of SDL is on marketing as a value co-creation process that is service-based.

Marketers can only provide value propositions, embedded in offerings, and their value depends entirely on the experiential evaluation of customers. They contend that service is the fundamental basis of exchange and 'goods are distribution mechanisms for service provision'(Tadajewski, Maclaran, Saren and Stern 2010, p. 10).

Bagozzi (2010), when looking back at the Discipline's theoretical evolution, states that, after placing emphasis on transactions and exchanges, Marketing theory must focus on exchange relationships as its dependent variable of analysis or its process under scrutiny.

Lisa O'Malley (2019) described the branch of Relationship Marketing as a discourse, more precisely, as an important contemporary discourse in marketing. In doing so, the author praised the aspect of theoretical narrative in the discipline. According to O'Malley (2019, p. 243),

The language of transactions has also been eschewed in favor of the management of marketing relationships (Dwyer et al. 1987; Hunt and Menon 1995; Webster 1992 apud O'Malley 2019, p. 249).

For O'Malley (2019), contemporary marketing discourse, through a series of metaphors, transfers attributes of marriages to marketing relationships.

In 2013, Pine II and Gilmore wrote that:

"It has been almost 20 years since we first described the next emerging wave of economic history as an experience economy. At the time, no one spoke of "experiential marketing" (its precursor was "marketing aesthetics")".

Bendassolli, Wood Jr., Kirschbaum and Pina-e-Cunha (2009), when analyzing how creative industries transform symbolic meanings into cultural commodities, start from two premises linked to our narrative:

The first premise is that immaterial production chains (Negri and Lazzaratto 2001) predominate, in terms of economic relevance, in a post-industrial context marked by the preponderance of the service sector and the economy of signs (Lash and Urry 1994). The second premise is that the consumption of symbols or meanings prevails over the consumption of material goods, as they were produced and consumed in industrial society (Bolin 2005; Blythe 2001; Hartley 2005; Lawrence and Phillips 2002 apud Bendassolli et al., 2009, p. 12-13).

Experience almost always also has an irrational quality because it emanates partly from an unconscious substrate (substratum). Artistic creations, including innovative architectural works, musical and theatrical performances, cinema, and crafts, display this ambiguous quality,

which blends rational technique and irrational inspiration. From this blend emerges the most genuine innovation. In short, human experience is inseparable from its intrinsic unconscious component.

This unconsciousness is reflected in people's choices. Loro and Barboza (2024) wrote that "*it is estimated that between 85 and 95% of our consumer decisions are unconscious (Lindstrom 2017; Zaltman 2003 apud Loro and Barboza 2024, p. 253).*"

Back to the starting point, let's return to the idea of a museum of present novelties.

According to our narrative outline, we already know that marketing essentially means developing relationships. If we want these relationships to be strong, then they must be long-term. Relationships often involve shared experiences. Therefore, these concepts, however important they may be, only place us in the past of the conceptual evolution of the Discipline. What is in the present? The present is the dematerialization of the underlying substrate of the exchanges promoted by marketing. In fact, thanks to the social communication technologies that we have today, assisted by Artificial Intelligence (AI), relationships have become increasingly symbolic, intangible, and immaterial. In other words, relationships in marketing occur at increasingly abstract, cultural, symbolic levels, independent of the goods and services that may eventually be offered. This process of dematerialization of relationships in marketing refers to the experience of a new type, greatly assisted by AI resources. In the context of this new paradigm, we envision a Macromarketing detached from material supports – the service-product binomial – and focused on promoting ideas and values with high social impact.

References:

Baker, Michael J. "Marketing: philosophy or function." *Marketing theory: A student text* (2010): 3-25.

Bagozzi, Richard P. "The Evolution of Marketing Thought: From Economic to Social Exchange and Beyond." In *The SAGE Handbook of Marketing Theory*, edited by Pauline Maclaran, Michael Saren, Barbara Stern, and Mark Tadajewski, 244–65. London: SAGE Publications Ltd., 2010.

Bendassoli, P. F., et al. "Indústrias criativas: definição, limites e possibilidades." *RAE* 49, no. 1 (January–March 2009): 10–18.

Gummesson, Evert. "The New Marketing: Developing Long-term Interactive Relationships." *Long Range Planning* 20, no. 4 (1987): 10–20.

Grönroos, Christian. "Quo vadis marketing? Toward a relationship marketing Paradigm." *Journal of Marketing Management* 10, no. 5 (1994): 347–60.

Louro, F. G., & Barboza, R. A. (2024). Neuromarketing: explorando o lado inconsciente do consumo. *ReMark - Revista Brasileira De Marketing*, *23*(1), 252–299. https://doi.org/10.5585/remark.v23i1.23541

O'Malley, Lisa. "Metaphor and Relationship Marketing Discourse." In *The Routledge Companion to Critical Marketing*, 243–55. London: Routledge, 2019.

Pine II, Joseph, and James Gilmore. "The experience economy: past, present, and future." *Strategic Horizons*, September 2013, 21–44.

Tadajewski, Mark, Matthew Higgins, Janice Denegri-Knott, and Rohit Varman, eds. *The Routledge Companion to Critical Marketing*. London: Routledge, 2019.

Vargo, S.L., and R.F. Lusch. "Evolving to a new dominant logic for marketing." *Journal of Marketing* 68, no. 1 (January 2004): 1–17.

Easy Money? How Digital Influencers Promote Online Gambling to Brazilian Consumers

Luiz Arthur Neves Lopes

Lucia Salmonson Guimarães Barros

In 2023, online casinos gained permission to operate in Brazil (Brasil 2023). Digital influencers often promote them, which raises significant ethical and legal concerns. Influencers, with their vast reach, primarily impact a young audience, who may be inexperienced regarding the risks of gambling. Online gambling expenses in Brazil exceeded R$ 50 billion in 2023. To put it in perspective, this amount surpasses the country's beef export revenue during the same period (Research XP 2024).

This scenario raises concerns about how gambling promotion by digital influencers amplifies their social, psychological, and economic impacts, especially on more vulnerable audiences. This study investigates the discourse of digital influencers in videos that promote online gambling platforms to their followers, focusing on Instagram. The objective is to identify speech patterns and group similar discourses to gain insights into their disclosure strategies and observe whether gambling risks are highlighted.

The methodology employed in this study involved collecting videos from digital influencers promoting gambling platforms through Instagram from March to August 2024. A total of 130 videos were selected, featuring the following digital influencers: Oruam, Mc Ryan Sp, Mc Ig, Mc Poze do Rodo, Mc Gabb, Boca de 09, Mc Paiva, Mel Maia, Lara Jucah, Nathalia Valente, Gabilly, Orochi, Menor Toddy, and Dfideliz. These influencers were chosen for promoting gambling and having at least 2 million followers.

The collected materials were transcribed with the assistance of the Good Tape artificial intelligence. After transcription, the videos were subjected to a coding process using the qualitative analysis software MAXQDA, where 25 specific codes were established. These codes were designed to explore the strategies used by influencers in promoting gambling and attracting players to the platforms based on recurring phrases and similar meanings, which characterize a content analysis (Bardin 2011).

The speeches of the digital influencers were organized into 25 distinct codes. These codes were grouped into six different categories: (1) gains and their probabilities, (2) wealth magnitude, (3) platform characteristics, (4) call to action, (5) closeness to the audience, and (6) responsibility, where they mention, for example, the risk of gambling.

In the category “gains and probabilities”, influencers share their successful gaming experiences, highlighting substantial wins. They present a narrative in which playing and winning are synonymous. In addition to promoting an optimistic view of gambling gains, influencers often conduct giveaways associated with gaming platforms and independently. These giveaways offer attractive prizes, such as cash or high-value items. The main message conveyed through these actions is that making money is easy and accessible, further reinforcing the appeal of gambling.

The category “wealth magnitude” focuses on the display of a luxurious lifestyle, such as exotic trips, luxury cars, impressive houses, private parties, and the consumption of sophisticated beverages. By doing so, they suggest that their successful bets could be a source of wealth, promoting the idea that gambling can provide a life of comfort and opulence. Influencers often use an ironic tone to illustrate the apparent ease with which they achieve such status. This display of wealth can reinforce the idea that gambling is a path to prosperity.

Influencers provide practical information in the “platform characteristics” category, such as the minimum deposit required and withdrawal amount. They also highlight the variety of games available, mentioning their names and specific features. This approach aims to demystify the functioning of gambling platforms, making them more accessible and less intimidating for followers. By presenting this information clearly and directly, influencers help reduce entry barriers for new players, encouraging them to try the platforms without hesitation.

The category “call to action” (CTA) refers to eliciting an immediate response or encouraging a quick sale (Osten 2023). Influencers use CTAs to turn followers' interests into concrete actions. They also promote so-called "paying hours", suggesting that there are specific periods when the platform is more generous with its players. Influencers also embed affiliate links in their videos or posts, directing followers to a platform's registration page. The combination of persuasive language, promotion of specific times, and use of affiliate links strongly encourage followers to act immediately.

The category “closeness to the audience” refers to how influencers cultivate an intimate and trusting relationship with their followers. Using warm and friendly language, they address the audience with affectionate terms like "family," "my dears," or "my loves." These words suggest that followers are part of an intimate community. This tone seeks to establish a trusting relationship between influencers and their followers. This trust relationship is reinforced when

influencers assure that the gambling platforms they promote are reliable and safe. They state that they would never put their followers in unfavorable situations.

The category "responsibility" refers to how influencers address risk issues in gambling, such as risk warnings, age restrictions, personal limits, and reports of financial losses. This category examines the communication of care and precautions to followers, contrasting with the predominantly optimistic approaches of the previous categories. However, it is worth noting that the occurrences in this category are quite limited. Only five videos show experiences of loss, contrasting with the predominantly gain-focused content.

To conclude, our research underscores how influencer marketing shapes public perception of gambling. It emphasizes quick gains and distorts the perception of real probabilities of success, which fosters risky gambling behaviors. The glamorous narrative makes it seem that wealth is easily attainable, creating a misleading aspirational connection. It often omits the risks, failing to warn about the importance of responsible gambling.

References

Bardin, Laurence (2011). *Análise de conteúdo.* São Paulo: Edições, 70, 276.

Brasil (2023). LEI Nº 14.790, DE 29 DE DEZEMBRO DE 2023. https://www.planalto.gov.br/ccivil_03/_ato2023-2026/2023/lei/l14790.htm

Osten, Barbara (2023). What is a Call-to-Action? Examples and Reasons to Use Them in Marketing Strategies. Rock Content. www.rockcontent.com/blog/call-to-action/

Research XP (2024). Apostas esportivas (bets) são investimentos? https://conteudos.xpi.com.br/aprenda-a-investir/relatorios/apostas-esportivas/

Enriching Marketing Education with Non-Growth Centric Approaches: A Pilot Study

Annette Hoxtell

This contribution explores the integration of sustainability content into a master's-level product management course within a business management program, focusing on how students respond to and adopt non-growth-centric approaches.

Many marketing-related courses such as product management class are rooted in perspectives of capitalist market economies, which prioritize growth—a concept central to much of marketing and business. However, this growth-centric approach is inherently unsustainable, as it places profit above people and the environment, ignoring the finite nature of Earth's resources (Göpel 2021, 2022; Hickel 2021; Lessenich 2016; Schmelzer and Vetter 2021). Scholars within macromarketing have consistently advocated for sustainability (see Lloveras and Quinn 2017; Macromarketing Society 2024; Shapiro 2006, among many others), and expect more academics to include it in their teaching (Kemper et al. 2022; Shapiro et al. 2021). Recently, even mainstream marketing scholars have called for sustainability to be embedded as an ontological cornerstone of the discipline (Meffert et al. 2024). Incorporating sustainability into marketing courses requires a critical examination of economic systems and their terminology. "The destruction of our planet must not be termed growth. Mere money-making must not be termed value creation" (Göpel 2021, p. 97).

Sustainable alternatives to growth-centric models, such as degrowth, post-growth and circular economies, offer promising pathways for rethinking business practices and marketing strategies (Kopnina and Bedford 2023; Kemper et al. 2022). To engage students effectively with these concepts, it is essential that they be both informed and encouraged to reflect on and apply sustainable marketing principles (Peterson 2022). For these ideas to reach the widest student audience, they should be integrated into mandatory marketing courses which currently often lack a normative focus on sustainability and non-growth-centric approaches. A notable challenge is that course titles and descriptions are frequently fixed for several years, making it difficult to integrate such topics immediately.

Research questions

- How can non-growth centric approaches be integrated into an existing product management course?

- How do students respond to these approaches?
- To which situations do students apply these approaches?

Method

A pilot trial was conducted in a mandatory product management course for first-year master's students specializing in marketing. Following the approach proposed by Watson et al. (2022), the course combined conventional product management instruction with sustainability content in both micro and macro-level sessions. Data was collected via student feedback in person and through an online evaluation platform, capturing both general course satisfaction and specific reflections on the sustainability integration. Quantitative methods were used to analyse online evaluation data regarding general course satisfaction, while qualitative responses—both online and in person—were categorized inductively using Mayring's (2022) qualitative content analysis.

Results

Non-growth-centric approaches were incorporated throughout the course design, including the syllabus, content, and assessment structure:

- Students were informed in advance about the revised content through the elearning platform.
- The syllabus integrated conventional and sustainability-focused sessions in the following sequence:
  - Planetary boundaries, climate justice and degrowth
  - Product and product policy
  - Circular economy
  - Product management tasks
  - Product development models
  - Applied sustainable product development
  - Product controlling and
  - Product elimination
- Sustainability materials were drawn from a range of sources, including:

- **Planetary boundaries, climate justice, and degrowth**: *endlich-wachstum.de* resources, climate justice presentations, adapted quizzes, and comics on rebound effects (Konzeptwerk Neue Ökonomie 2024)
- **Circular economy**: materials from the European Parliament and outdoor brands such as Globetrotter, Patagonia, and VAUDE (European Parliament 2021, 2023; Globetrotter Ausrüstung GmbH n.d.; Patagonia 2024; VAUDE 2024a)
- **Sustainable product development**: case studies and initiatives by Patagonia and VAUDE (Kotler et al. 2023; VAUDE 2017; VAUDE 2019; VAUDE 2024b)

- Conventional product management topics were addressed using standard textbooks (Aumayr 2024; Erne 2024; Hoffmann 2023), with particular emphasis on product elimination (Erne 2024).
- Assessment was based on group projects where students either developed sustainable products/services or created strategies to reduce the consumption of unsustainable products/services. Assessment included a mix of individual and group components:
  - An individual short presentation on a scientific article related to non-growth-centric marketing at the start of the semester
  - Four brief progress reports throughout the semester
  - A longer interactive group presentation at the end of the semester.

Students responded positively both to the course overall and to the integration of sustainability content. Three key themes emerged:

- satisfaction with the balance of traditional marketing and sustainability content,
- perceived applicability of sustainability and non-grwoth concepts to marketing and personal consumption
- appreciation for including sustainability as a timely and relevant topic.

Of the five student groups:

- Two applied non-growth-centric approaches to the development of sustainable products and services—one designed a lemonade using damaged regional fruit; the other proposed a “leftover week” to reduce food waste.
- Three focused on reducing the consumption of unsustainable products and services—projects included transitioning from combustion to electric vehicles, minimizing fast

fashion consumption, and imagining a meat-free society to reduce food waste and promote healthier diets.

Implications

The findings suggest that incorporating non-growth centric principles into compulsory marketing courses is both feasible and well-received by students. It empowers students to innovate or reduce unsustainable consumption by applying these principles to real-world contexts. While the results are limited due to the small sample size, lack of a control group, and specific course context, they align with prior findings by Reppel and Beninger (2025) and Watson et al. (2022).

Encouraged by the positive outcomes, plans are underway to incorporate non-growth centric perspectives into additional mandatory marketing courses across both undergraduate and postgraduate levels. Future efforts will include revising course titles and descriptions to better reflect sustainable marketing content and exploring the introduction of mandatory macromarketing courses. Additionally, further research will involve pre- and post-testing to assess the effectiveness of these interventions (Watson et al. 2022) as well as the adoption of successfully tested teaching concepts and materials.

This initiative aims to inspire fellow educators to adopt similar approaches and create a platform for sharing insights that could drive a broader transformation in marketing education toward sustainability and non-growth centric principles. As the project progresses, applying teaching and learning theories will help frame studies and better understand how students engage with non-growth centric marketing concepts.

References

Aumayr, Klaus J. (2024), Erfolgreiches Produktmanagement: Toolbox für das professionelle Produktmanagement und Produktmarketing [successful product management: a toolbox for professional product management and product marketing]. Wiesbaden: Springer Fachmedien Wiesbaden.

European Parliament (2021), “Wie will die EU bis 2050 eine Kreislaufwirtschaft erreichen?,” (How does the European Union want to achieve a Circular Economy until 2050?] Themen | European Parliament, (accessed April 10, 2025), [available at

https://www.europarl.europa.eu/topics/de/article/20210128STO96607/wie-will-die-eu-bis-2050-eine-kreislaufwirtschaft-erreichen].

European Parliament (2023), “Kreislaufwirtschaft: Definition und Vorteile,” [Circular Economy: Definitions and Advantages] Themen | European Parliament, (accessed April 10, 2025), [available at https://www.europarl.europa.eu/topics/de/article/20151201STO05603/kreislaufwirtschaft-definition-und-vorteile].

Erne, Rainer (2024), Produktmanagement klipp & klar [Product Management Plainly and Simply], WiWi klipp & klar. Wiesbaden: Springer Gabler.

Globetrotter Ausrüstung GmbH (n.d.), “RE:THINK - Globetrotter Nachhaltigkeit” [RE:THINK – Globetrotter Sustainability] (accessed April 10, 2025), [available at https://www.globetrotter.de/ueber-globetrotter/nachhaltigkeit/].

Göpel, Maja (2021), Unsere Welt neu denken: Eine Einladung (16th ed.) [Thinking our World Anew: An Invitation]. Berlin: Ullstein.

Göpel, Maja with Marcus Jauer (2022), Wir können auch anders: Aufbruch in die Welt von morgen [We can do things differently: Let's set out into tomorrow's world]. Berlin: Ullstein.

Hickel, Jason (2021), "What does degrowth mean? A few points of clarification", Globalizations, *18*(7), 1105–1111.

Hoffmann, Sascha (Ed.) (2023), Digitales Produktmanagement: Methoden – Instrumente – Praxisbeispiele [Digital Product Management: Methods - Instruments - Practical Examples]. Wiesbaden: Springer Fachmedien.

Kemper, Joya A., Emily M. Moscato, and Ann-Marie Kennedy (2022), “Hacking the Marketing Education System: Using Macromarketing and the Circular Economy to Make a Better World,” Journal of Marketing Education, 44 (3), 311–21.

Konzeptwerk Neue Ökonomie (n.d.), “Endlich Wachstum - Bildungsmaterialien für eine sozial-ökologische Transformation,” [Finite Growth - Educational Resources for a Socio-ecological Transformation], (accessed September 15, 2024), [available at https://endlich-wachstum.de/'https://endlich-wachstum.de].

Kopnina, Helen and Timothy Bedford (2024), “From Pseudo to Genuine Sustainability Education: Ecopedagogy and Degrowth in Business Studies Courses,” Australian Journal of Environmental Education, 40 (3), 574–87.

Kotler, Philip, Kevin Lane Keller, Alexander Chernev, and Marc Oliver Opresnik (2023), Marketing-Management: Konzepte - Instrumente - Unternehmensfallstudien [Marketing-Management: Concepts - Instruments - Corporate Case Studies]. Munich: Pearson.

Lessenich, Stephan (2016), Neben uns die Sintflut: Die Externalisierungsgesellschaft und ihr Preis [The Deluge next to us: The externalizing society and its price]. Berlin: Hanser.

Lloveras, Javier and Lee Quinn (2017), "Growth and Its Discontents: Paving the Way for a More Productive Engagement with Alternative Economic Practices". Journal of Macromarketing, *37*(2), 131–142.

Macromarketing Society (2024), President's Welcome, The Macromarketing Society. http://www.macromarketing.org/about/

Mayring, Philipp (2022), Qualitative Inhaltsanalyse: Grundlagen und Techniken [Qualitative Content Analysis: Basis and Techniques], Weinheim Basel: Beltz

Meffert, Heribert, Christoph Burmann, Manfred Kirchgeorg, and Maik Eisenbeiß (2024), Marketing: Grundlagen marktorientierter Unternehmensführung Konzepte – Instrumente – Praxisbeispiele [Marketing: Principles of market-based Management Concepts - Instruments - Practical Examples]. Wiesbaden: Springer Fachmedien.

Patagonia (2024). Turning Trash into Treasure: Voices from Chile's Fast Fashion Graveyard in the Atacama Desert, (accessed April 10, 2025) [available at https://www.youtube.com/watch?v=4DV-rtpj2tY].

Peterson, Mark (2022), "Using Macromarketing to Teach Business Sustainability". Journal of Marketing Education, *44*(3), 390–401.

Reppel, Alex and Stefanie Beninger (2025), "Reflections on Holixec Education: A Macromarketing Response to Contemporary Educational Challenges?," Journal of Macromarketing, 02761467251315113.

Schmelzer, Matthias and Andrea Vetter (2021), Degrowth/Postwachstum zur Einführung (3rd ed.) [An introduction to degrowth/postgrowth]. Hamburg: Junius.

Shapiro, Stanley, Stefanie Beninger, Christine Domegan, Alexander Reppel, Julie Stanton, and Forrest Watson (2021), "Macromarketing Pedagogy: Empowering Students to Achieve a Sustainable World," Journal of Macromarketing, 41 (1), 104–15

Shapiro, Stanley J. and Göran Svensson (2006), "Macromarketing: Origins, development, current status and possible future direction", European Business Review, *18*(4), 307–321.

VAUDE (2017), Research and development, (accessed April 10, 2025) [available at https://www.youtube.com/watch?v=n_eqjgAi25U].

VAUDE (2019), #yourspirit, (accessed April 10, 2025), [available at https://www.youtube.com/watch?v=_0MSc-FZTMI].

VAUDE (2024a), Outdoor-Produkte neu gedacht in Richtung Kreislaufwirtschaft, (accessed April 10, 2025) [available at https://www.youtube.com/watch?v=A-_JMaczQ9w].

VAUDE (2024b), Claudi Rohrer's Eco-Conscious Life: Embracing Sustainability Every Day, (accessed April 10, 2025), [available at https://www.youtube.com/watch?v=A-_JMaczQ9w].

Watson, Forrest, Julie Stanton, Stefanie Beninger, Christine Domegan, Alexander Reppel, and Stanley Shapiro (2022), "Teaching What Society Needs: 'Hacking' an Introductory Marketing Course With Sustainability and Macromarketing," Journal of Marketing Education, 44 (3), 375–89.

Entrepreneurship for Peace in Post-Conflict Colombia: Social, Female, and Ex-Combatant Entrepreneurship in Chocó and Montes de María

Ulf Thoene

Roberto García

James Pérez

Entrepreneurship has been recognized as a critical driver of economic recovery, social cohesion, and peacebuilding in post-conflict settings (Hoelscher & Miklian, 2025). This paper explores how social, female, and ex-combatant entrepreneurship contributes to sustainable peace in Colombia, focusing on two regions heavily affected by conflict: Quibdó, the capital of the Chocó Department on the Pacific coast, and the Montes de María region on the Caribbean coast. Drawing on survey data and in-depth interviews, we analyze how entrepreneurial initiatives create economic opportunities, foster trust among former adversaries, and mitigate the risk of conflict recurrence.

We assess the economic, social, and institutional conditions that shape entrepreneurial activities in these post-conflict areas. Our findings reveal that entrepreneurship plays a dual role: it serves as a tool for economic inclusion and personal transformation, particularly for women and former combatants seeking reintegration. However, systemic barriers such as financial exclusion, lack of formal market access, the digital divide and persistent stigmatization continue to hinder the full potential of these initiatives (Pérez et al., 2023). Additionally, we examine how local entrepreneurs navigate security, governance, and community trust challenges, highlighting best practices for fostering sustainable businesses in fragile environments.

Building on insights from the literature on business-for-peace (B4P) and entrepreneurship in conflict zones (Joseph et al., 2023), we argue that targeted support mechanisms—such as microfinance, skills training, and market linkages—are essential to enhancing the long-term impact of these enterprises. Our research contributes to the growing discourse on post-conflict economic development by demonstrating how entrepreneurship, when strategically supported, can facilitate social cohesion and economic resilience in Colombia's most vulnerable regions.

References:

Hoelscher, K. and Miklian, J. (2025). Small business leadership, peacebuilding, and citizen perceptions of businesses as peacebuilders: theory and evidence from Colombia. *Society and Business Review*, 20(1), 103-132.

Joseph, J., Katsos, J. E., & Van Buren, H. J. (2023). Entrepreneurship and Peacebuilding: A Review and Synthesis. *Business & Society*, 62(2), 322-362.

Pérez-Morón, J., Thoene, U., & Alonso, R. G. (2023). Sustainability and women entrepreneurship through new business models: the case of microfranchises in post-peace agreement Colombia. *Management Research: Journal of the Iberoamerican Academy of Management*, 22(3), 324-342.

Evolution of Public Administration: from the theory of bureaucracy to digital transformation

Moacir Santana de Almeida

Ana Carolina Gouvêa Dantas Motta

In the current global technological development landscape, there is an increasing demand for organizations to provide high-quality digital services and solutions. The implementation of digital technologies in public organizations has been growing significantly, and the adoption of the Government as a Platform (GaaP) model has allowed for greater agility, simplification, and the creation of new services. The main objective of this research is to analyze the historical evolution of government digitization and understand the role of the Federal Public Administration (FPA) in the transformation of the State into a Digital Platform, identifying the key aspects of Government as a Platform. In this context, the paper presents a review of the main concepts to synthesize the state-of-the-art in the field, mapping how both classical literature and recent approaches address the topic.

Keywords: Government as a Platform; Digital Government; Digital Transformation; Public Service.

1. Introduction

Digital platforms constitute a powerful mechanism through which various groups of users engage in personalized interactions, create markets, and generate value, relying on digital infrastructures and the circulation of algorithmically processed data (Poell et al. 2000). Furthermore, their emergence has introduced new dynamics of innovation, disruption, and economic cycles, which can be disruptive, driving, or responsible for paradigm shifts (Ferreira et al. 2021).

Throughout the evolution of digital technologies and the popularization of the internet, governments have also undergone transformations, changing their operational structures to prioritize collaboration, citizen participation, and the creation of public value. This process is known as Government as a Platform, a model in which public administration operates as an open platform, adopting modular and open standards to enhance interactions between government, the private sector, and society (Repette et al. 2020).

This approach is understood as a broader, global perspective on the digital transformation in public administration (Reck and Hubner, 2021). In this model, the government takes on the

role of the platform provider, responsible for establishing its core (Seo and Myeong, 2021), defining rules to ensure the proper functioning of applications and their interactions (Seo and Myeong 2021), ensuring interoperability and the adoption of open standards (Filgueiras et al. 2022), and promoting governance as well as effective mediation between various actors, both internal and external to the government (Filgueiras et al. 2022).

To gain a deeper understanding of the Government as a Platform concept, it is essential to explore its key theoretical references, including the theory of bureaucracy, managerial administration, New Public Management (NPM), the principles of transparency and platformization, as well as approaches to digital transformation in public administration. This research aims to investigate the historical trajectory of government digitization and analyze the role of the Federal Public Administration (FPA) in the transition to a digital platform state, identifying the key aspects that characterize the Government as a Platform model.

1.1 The Theory of Bureaucracy and its Main Characteristics

Bureaucracy, as a management model and organizational structure, has been widely studied in academia. Given that the focus of this work is on public administration, it is essential to address this topic by considering some of the perspectives developed around this model.

Initially, it is important to highlight that bureaucracy had already been adopted as a management model since the 16th century in Europe, evolving alongside social, economic, and political transformations, as well as the development of the market economy (Silva et al. 2019). According to Tojal and Carvalho (1997), the term "bureaucracy" emerged in the 18th century to designate the body of officials in the administration of the absolutist French state.

In the 19th century, after its refinement in structuring and operating private organizations, bureaucracy was gradually adopted as a management model in public organizations as well, as pointed out by Silva et al. (2019). The goal was to apply this experience to public administration and its relationship with the governed. The process of bureaucratization in public organizations aimed to meet the basic needs of the population and ensure a satisfactory level of development for industrialized nations.

Two distinct theoretical currents recognize bureaucracy as a phenomenon from both a historical-structural and organizational perspective. Tojal and Carvalho (1997) trace the emergence of bureaucracy and the formation of the modern state through the public-private and

political-economic dichotomies. In this context, they identify three fundamental reasons: the emergence of the idea of sovereignty, which separated power from the princes; the depatrimonialization of power through the taxation system, which would support the state; and the depersonalization of power, which came to be seen as subordinated to the law, distancing the divine and dynastic character of the ruler. Similarly, Silva et al. (2019) understand bureaucracy as a phenomenon that encompasses social, political, and economic aspects, in addition to reflecting the structure of modern administrations.

For Tojal and Carvalho (1997), Weberian bureaucracy is closely tied to the legal-rational type of domination, emphasizing that the development and expansion of bureaucracy were driven by the growth of democratic practices, among which the administration by autonomous officials was particularly prominent. Along the same lines, Saraiva and Capelão (2000) view bureaucracy as a form of domination based on technical knowledge, characterized by “formal rules that facilitate standardization and equality in dealing with cases, precisely defining command and subordination relations through the systematic distribution of tasks to be carried out, aiming at specific goals” (Saraiva & Capelão 2000, p. 2).

This viewpoint is shared by De Almeida and De Souza Diniz (2020), who argue that the bureaucratic form of domination opposed earlier forms of domination, such as patriarchal and patrimonial. The first was grounded in tradition, while in the second, there was no clear separation between the public and private spheres from the perspective of the official. The authors also highlight that technical knowledge is what grants rationality to the model, ensuring, at the same time, administrative efficiency. According to the bureaucratic ideal, this provides the means to guarantee democracy by preventing bureaucratization from becoming a tool of power for rulers. In this sense, the separation between the private sphere of the official and the exercise of their public duties enabled the "professionalization of officials and the assignment of an objective character to the position, thereby unlinking it from a personal relationship with the ruler and establishing the norm — not the will of the sovereign — as the foundation of subordination and discipline" (Olivieri 2011, p. 1400-1401).

The modern bureaucratic domination, based on rational-legal authority, emerged with the purpose of combating previous forms of domination, in which officials served their sovereign, configuring the model of patrimonial bureaucracy (Olivier, 2011). This process of bureaucratization delegated to the state the concentration and centralization of functions,

characterized by "the rigidity of procedures and the excess of norms and regulations" (De Faria and De Fari, 2017). Furthermore, it established a strict hierarchy of subordination for officials, both to the norms and procedures as well as to their hierarchical superiors within the organization (Olivieri 2011).

This movement was directly related to one of the central goals of bureaucracy: the depersonalization of power (Silva et al. 2019). Another example of how bureaucracy sought to mitigate the concentration of power in a single individual was the structuring of public positions, which were supposed to be endowed with objectivity, loyalty, and impersonality (Saraiva and Capelão 2000; De Almeida and De Souza Diniz 2020).

The authors mentioned also emphasize that one of the goals of bureaucracy was the separation between public and private matters, a principle reflected in the characteristics of public positions, as mentioned earlier. Weber (1982) describes this segregation between the two spheres as follows:

In principle, the modern organization of public service separates the office from the private domicile of the official, and in general, bureaucracy segregates official activity as something distinct from the sphere of private life. Public funds and equipment are divorced from the private property of the authority. This condition is, everywhere, the result of a long development. Nowadays, it is observed both in the public sector and in the private sector; in the latter, the principle extends even to the entrepreneur. In principle, the executive office is separate from the residence, business correspondence is separate from personal correspondence, and the company's assets are distinct from private fortunes. The coherence of modern business administration has been proportional to this separation (Weber 1982, p. 231).

The passage highlights the dichotomy between what is public and what is private as one of the central characteristics of bureaucracy. Weber (1982) observes that the first examples of this separation occurred in urban communities when periodic elections began to define positions of power in the States. Alongside the development of bureaucracy, the distinction between the areas of law emerged, with the creation of Public Law and Private Law. As Weber expresses:

Only with the bureaucratization of the State and of law in general do we see a defined possibility to clearly and conceptually separate an 'objective' legal order from the 'subjective rights' of the individual, which it guarantees; to separate 'Public Law' from 'Private Law'. The first regulates the interrelations of public authorities and their relations with the 'subjects'; Private

Law regulates the relations of governed individuals with each other. This conceptual separation presupposes the conceptual separation of the 'State', as an abstract bearer of sovereign prerogatives and the creator of 'legal norms', from the 'personal authorizations' of individuals. These conceptual forms are necessarily distant from the nature of the structures of pre-bureaucratic authority, and especially from patrimonial and feudal structures. This conceptual separation between the private and the public was conceived and realized, first, in urban communities, because as soon as the occupants of positions were determined by periodic elections, the individual holder of power, even if occupying the highest position, was evidently no longer the same as the man who had authority 'on his own account'. Nevertheless, it was left to the total depersonalization of administrative leadership by bureaucracy, and the rational systematization of law, to make the separation between the public and the private, thoroughly and in principle" (Weber 1982, p. 276-277).

The separation between public and private affairs was one of the bureaucratic ideals proposed by Weber (1982), also serving as a key strategy to combat patrimonialism (Faria and Faria 2017; Silva et al. 2019). Patrimonial administration can be understood as the way in which the ruler organizes the state apparatus as if managing their own property, using the prerogatives of the office to gain personal benefits at the expense of collective well-being and to maintain their social privileges (Silva et al. 2019).

In this context, the creation of impersonal rules allowed the criteria for state action to become more prescriptive, formal, and inflexible, reducing informality while ensuring that the objectives of the rules were met more objectively (Saraiva and Capelão 2000). Thus, the authors emphasize that state employees are subordinated to the norm itself. However, this rigidity "does not guarantee either speed, good quality, or low cost for the services provided to the public; in fact, it is slow, expensive, self-referential, and little or not at all oriented towards meeting the demands of citizens" (Saraiva and Capelão 2000, p. 2).

Bureaucracy has also been understood as a fundamental component of the state's capacity, being one of the mechanisms "(...) capable of enabling the power of the state and expanding it to various social and territorial groups" (Souza 2017, p.28). In this sense, its professionalization is seen as an essential aspect of state capacity and one of the institutional pillars for the functioning of the democratic system (Cavalcante and Carvalho, 2017). This movement is interpreted as a strengthening of the state against the private interests of certain

groups, as "the bureaucratic apparatus is responsible for ensuring the legal rules that sustain the political system" (Olivieri 2011, p. 1398).

This brief overview of bureaucracy highlights its importance in the structuring of the state, in a process of rupture with the previous model of state organization, centered on the figure of the ruler. With the transformations that occurred in the 20th century, the bureaucratic model also underwent modifications, adapting to new social, economic, and political demands. The following will address the characteristics of managerial administration and New Public Management (NPM).

1.2 Managerial Administration and New Public Management

During the 20th century, with the emergence of new social, political, and economic demands driven by globalization, bureaucracy proved unable to efficiently address emerging needs, resulting in the wear and tear of the model itself. As a consequence, there arose the need to reorient the role of the state and redefine its level of interference in societies, especially in the economic sphere (Reis 2014).

Managerial administration aims to adopt more flexible practices, focused on achieving results, through the enhancement of administrative efficiency (Silva et al. 2019). The emergence of this new model aimed to overcome, in public administration, the forms of patrimonial and bureaucratic management (Faria and Faria, 2017). Although it presents a counterpoint to the bureaucratic model:

(...) this view does not exclude or overcome the application of the bureaucratic dimensions that were affirmed and remain in the state organizations to this day, even contributing to the fact that managerial practices have apparatuses that can be used to perform a management focused on results" (Silva et al. 2019, p. 9).

From the perspective of the authors, it is understood that the implementation of a new management model, succeeding older models, does not imply abandoning the previous ones. Faria and Faria (2017) emphasize that the new forms of administration aim to correct the eventual distortions present in the predecessor models, within an evolutionary approach that sought to show that the latest model would undoubtedly be the most appropriate. The relationship between bureaucracy and managerial administration is not one of rupture but of utilization and

continuity, incorporating the improvements brought by managerial practices (Silva et al. 2019; BRASIL 1995).

The managerial model brought with it three important effects: the implementation of ex-post controls, increased autonomy, and the view of the citizen as a client, not just a taxpayer (Tojal and Carvalho 1997; Coelho 2000; Faria and Faria 2017). This model is characterized as a form of rationality that emphasizes the logic of the market, modernization, and the preparation of the state to achieve greater efficiency (Castro et al. 2017; BRASIL 1995). The goal was not only to imitate the practices of the private sector in the market but also to allow the state to evolve alongside this reality (Silva et al., 2019). However, while the administration of private entities is focused on achieving profit, public administration is oriented by the collective interest (BRASIL 1995).

In the document "Plano Diretor de Reforma do Aparelho do Estado de 1995" (BRASIL 1995), the managerial model was defined as follows:

Managerial Public Administration – Emerges in the second half of the 20th century, in response, on one hand, to the expansion of the state's economic and social functions, and on the other, to technological development and the globalization of the world economy, as both exposed the problems associated with the previous model. The efficiency of public administration – the need to reduce costs and improve the quality of services, with the citizen as the beneficiary – becomes essential. The reform of the state's apparatus becomes predominantly guided by the values of efficiency and quality in the delivery of public services and the development of a managerial culture within organizations (BRASIL 1995, p. 15-16).

One of the essential changes brought by this model is the transformation of the control approach: instead of focusing on processes, the focus shifts to results, although the rigorous professionalization of public administration remains a fundamental principle (BRASIL 1995, p. 16). In this context, the state should adopt objective indicators that allow for greater validation and visualization of the achievement of results, in place of process control (Alves and Gomes 2020). Coelho (2006) supports this understanding by stating that managerial administration incorporates a set of more modern forms of public management, including the reformulation of public service control criteria.

The idea of efficiency is tied to the need to reduce costs while aiming to improve the quality of services provided to the population, especially in activities typically assigned to the

state (Coelho, 2006). In this sense, the perspectives adopted by managerial administration are similar to practices commonly found in private companies, such as cost containment and the promotion of a competitive nature.

Managerialism can be considered a technique through which public policies developed by the state can be instrumentalized and put into practice (Coelho, 2006). Thus, it can be classified as a means of implementation, similar to the bureaucratic model. Both models share a procedural focus aimed at public objectives, with the managerial model tending to be more flexible and focused on results, while the bureaucratic model is more rigid, with an emphasis on means.

To illustrate these differences, the table below presents a comparison between the characteristics of the bureaucratic model and the managerial model.

Bureaucratic Administration	**Managerial Administration**
Rigidity	Flexibility
Control of procedures	Control of results
A priori controls (established in advance by rules)	A posteriori controls
Limited autonomy	Increased autonomy
Person viewed as a citizen	Person viewed as a customer
Focus on the quality of procedures	Focus on the quality of deliverables

Table 2 - Comparison between the characteristics of the bureaucreatic model and the managerial model

Source: authors' own elaboration

Based on the discussion about managerialism and its characteristics, it is possible to understand that it represented an improvement over the bureaucratic model, as well as paving the way for the emergence of New Public Management (NPM).

After the introduction of managerialism in the public sector, a new theoretical-conceptual movement emerged, known as New Public Management. Hood (1991) pointed out that this

movement emerged as a result of successive waves of managerialism, which carried the central idea of transferring professional management practices to the public sector. The first to adopt this model were the British and the Americans, with the United Kingdom embracing it when Margaret Thatcher became Prime Minister in 1979, and in the United States with Ronald Reagan (Coelho 2000; Maia and Correia 2022). In the case of the United Kingdom, Thatcher brought a private sector administrator to the government (Reis 2014). In both cases, the movement represented a victory for right-wing politics (Maia and Correia 2022). New Public Management began gaining momentum between the 1980s and 1990s (Peci et al., 2008).

Among the reasons that justified the emergence of NPM, Maia and Correia (2022) highlight the state's resource contingencies due to high public spending, changes in conceptions about the functioning of public administration, and the correlation between public administration efficiency and national economic growth. Correia et al. (2022) also point to the fiscal crisis of states, the search for more efficient and better-quality services, advances in organizational and technological knowledge, the spread of neoliberal ideologies, and the growing complexity and demands of societies as causes of the emergence of NPM.

The main objectives of New Public Management (NPM) were two essential points: 1) to propose solutions for public administration and 2) to adapt and transfer managerial knowledge developed in the private sector to the public sector (Peci, Pieranti, and Rodrigues, 2008). According to the authors, NPM aimed to reduce the size of the administrative apparatus, increase its efficiency, and create mechanisms for holding political actors accountable. Along similar lines, Correia et al. (2022) argue that NPM is characterized as "an attempt to implement business management concepts and techniques in the public sector, with an emphasis on public services" (Correia et al., 2022, p. 55). They highlight the premise that management in the private sector would be superior to that in the public sector and, therefore, should be applied to promote improvements in the latter.

Coelho (2000) also shares a similar view on the search for efficiency, stating that the fundamental principle of NPM is "that public organizations can be managed by meeting performance imperatives, combining efficiency, effectiveness, and quality in responding to the demands for public services, provided that adequate institutional arrangements enable such a combination" (Coelho, 2000, p. 260).

In her work, Coelho (2000) also defines two important terms: management public and managerialism. The first, management public, is considered a recent concept related to how an organization can be managed based on the market and its relationship with it. The goal of this concept is to align the public sector with the global trend of administrative reforms. The main idea is to bring public organizations closer to private organizations through a structure focused on performance and results. Peci et al. (2008) also recognized this approach, characterizing these practices as intra-organizational.

According to Coelho (2000), management public aims to use knowledge and practices previously applied in companies, adapting them to the public service reality and thus turning them into instruments of innovation in public management. When discussing management public, the author highlights that it is characterized by:

An autonomous discipline that combines public demands, which are translated through the rules of organizations with specific operational structures, globally linked to the notion of public service, and a concern for efficiency and effectiveness that leads those in charge to have to carry over examples from private companies, without, however, denying the innovative character of public management. (Coelho 2006, p. 260).

In turn, managerialism is described as a "(...) technique for instrumentalizing and operationalizing previously developed and accepted public policies within the organization. It is, therefore, a means of implementation" (Coelho 2000, p. 260). Thus, the author emphasizes that managerialism does not incorporate the political element as a central characteristic of its concept, drawing a comparison with bureaucracy, which also did not present this element, as argued by Peci et al. (2008). The author suggested that what truly distinguishes these two models is the flexibility or rigidity of each, and/or the greater emphasis on means or results.

Several fundamental principles are associated with the study of New Public Management (NPM). According to Maia and Correia (2022), these principles can be organized into four dimensions: efficiency, changes in structures, pursuit of excellence, and public service. The emphasis on efficiency was predominant in the early 1980s, a period when the aim was to bring public administration closer to private management, as public administration was seen as problematic, rather than a solution. The dimension related to changes in structures includes reducing large vertically integrated organizations (downsizing), aiming for greater flexibility, decreased standardization, decentralization, increased strategic and budgetary responsibility, as

well as intensifying external hiring (Maia and Correia 2022). For the authors, the dimensions of efficiency and structural changes reflect an effort to rationalize public administration by reshaping its structures toward more flexible and autonomous modes.

In the dimension of the pursuit of excellence, Maia and Correia (2022) observed the emphasis on organizational culture, the rejection of the rationalist approach, and the growing interest in themes related to change management and innovation. The final dimension, public service, describes a new relationship between Administration and citizens, integrating the ideas of both public and private sector management, in addition to adapting influences from Total Quality Management and Learning Organizations. The dimensions of pursuit of excellence and public service reflect a growing concern with organizational culture, a consequence of the exhaustion of exclusively applying efficiency and effectiveness criteria.

The new public administration places citizens' rights on equal footing with administration, ensuring that the latter respects those rights and is held accountable (Saraiva and Capelão, 2000). In this perspective, the authors argue that NPM ends bureaucratic arbitrariness by promoting the identification of citizens and ensuring that administration is responsive to them. Correia et al. (2022) suggest that this transformation occurred due to the attempt to abandon bureaucracy and its dysfunctions, evolving into NPM. In the view of these authors, the following elements enabled this transition:

Public managers should be guided by the establishment of clear goals and subsequent evaluation of results; the dichotomy between politics and administration is softened, as there is a decentralization of decision-making power, involving the community and field bureaucrats (public employees) in the design of public policies, thus the focus is directed towards implementation and evaluation (the public policy cycle); the government must make decisions (decision-making function) and be evaluated based on the results produced in the community or collective; trying to replicate in the public sector the techniques that allow for the efficiency of business management, aiming for the technical rationality of efficiency and promoting accountability of managers based on the evaluation of their actions and the results generated from them (accountability); management processes supported by market logic and a less interventionist state, adjusted to the context, allowing greater autonomy for public services, while always resorting to the private sector when necessary, to satisfy public needs. (Correia et al. 2022, p. 55-56)

Based on the excerpt above, it can be inferred that NPM, in general, aims to make the government more efficient by promoting greater participation in the decision-making process and holding managers accountable for the results achieved. Maia and Correia (2022) highlight that although NPM has reconfigured public administration management, it has also brought with it a series of contradictions, such as:

NPM introducing contradictions, trade-offs, limitations, and dilemmas in public management, such as: containing public spending vs. improving the performance of public services; holding the government accountable vs. privatization; motivating staff and promoting cultural change vs. weakening tenure and downsizing; improving service quality vs. cutting costs; increasing political control over bureaucracy vs. freedom to manage vs. empowering public service users; fragmenting public administration structures by creating agencies with single purposes (specialization) vs. improving horizontal coordination. And, last but not least, the relationship between citizens and public administration is being reduced to a market function. (Maia and Correia, 2022, p. 126)

The characteristics observed in countries that adopted NPM include significant structural changes in public administration, with an emphasis on the pursuit of greater efficiency and transparency, decentralization of administrative decisions, and the introduction of managerial practices inspired by the private sector. Furthermore, these countries began to value accountability, holding public managers responsible for the results achieved, and implementing strategies for continuous monitoring and evaluation of public services, with a focus on outcomes and citizen satisfaction.

They lie in the power of professional public sector management, the use of explicit performance standards and measures, the emphasis on controlling outputs rather than procedures, contradicting the Weberian logic of organization, the shift towards disaggregation of large public sector units, under the maxim "the small is beautiful," the introduction of greater competition in the public sector, the supremacy of management styles and practices from the private sector (abandoning military styles and utilizing proven private sector management tools), and finally, the emphasis on discipline and frugality in the use of resources, that is, "doing more with less." (Maia and Correia, 2022, p. 127)

The NPM movement has been fundamental in spreading the idea of transparency within public administration, promoting the adoption of practices aimed at opening government actions to public oversight and societal scrutiny.

1.3 Government Transparency

Government transparency involves a range of challenges, benefits, and opportunities. Among the main benefits, the increase in accountability, the strengthening of citizen participation, and the expansion of efforts to combat corruption stand out. To gain a deeper understanding of the concept of transparency, the following will present authors' views on the subject.

Rodrigues (2020) notes that since the 19th century, the concept of transparency has been studied, debated, and understood as the publicity of state actions. During that period, there were viewpoints that saw publicity as an antidote to the abuse of power, considering that public oversight would be more effective. However, Rodrigues (2020) argues that these ideas, still in their early stages, did not address important issues such as:

the difficulties of information exchange and the formation of public opinion. They mistakenly assume that everyone has the same capacity to understand all kinds of information and fail to consider the existence of closed ideological groups that do not access information that does not support their point of view (Rodrigues 2020, p. 239).

From the second half of the 20th century, Rodrigues (2020) highlighted two key aspects related to transparency. The first was informational asymmetry, which gained prominence in the studies of economists of the time. At the same time, transparency began to be seen as a powerful tool in the fight against corruption. Around the 1990s, with the shift in the state's role to a coordinator of solutions, there was an increased demand for greater social control. This period coincided with the NPM movement, which caused transparency to align with the principles of this movement.

Several authors argue that the concept of transparency goes beyond the simple disclosure of data to the public (Possamai and Gonzatti de Souza 2020; Rodrigues 2020; Oliveira and Beck 2022; Dos Santos Maciel 2020; Visentini et al. 2021; Viegas et al. 2022).

In this context, Possamai and Gonzatti de Souza (2020) state that transparency is crucial for understanding and citizen participation. Furthermore, by promoting the accountability of

public agents, it contributes to the expansion of democracy. Rodrigues (2020) emphasized the importance of two central elements of transparency: visibility and inferability. Visibility refers to the ease of searching and finding the information, while inferability concerns the ability to make deductions and accurate conclusions from the data. The author argues that for transparency to be effective, the information must be of high quality, accessible, and useful.

Oliveira and Beck (2022) highlighted that the information must be understandable to the entire society, in addition to having attributes such as relevance, reliability, and timeliness. Moreover, public administration must ensure that the information is presented in an integral and honest manner. The authors also revisited a discussion dating back to the 18th century, during the Enlightenment period, when the idea of reducing governmental opacity was advocated, seeking to combat the secrecy of the political system prevailing in absolutism.

Following this line, Dos Santos Maciel (2020) reinforced the need to make information accessible and understandable for the entire society. For this to happen, the authors suggest that the language used should be clear, which facilitates access to information, and that open format tools should be made available, allowing for proper analysis and interpretation of the data.

Visentini (2021) also opposed opaque policies and emphasized that public matters should be managed transparently. Additionally, he stressed that the information should be clear and objective, allowing for more effective monitoring by citizens. In line with this perspective, Viegas (2022) argued that the language used should be clear, objective, and accessible, avoiding the use of technical jargon that may be incomprehensible to the general population.

Outro grupo de autores explorou a relação entre transparência, accountability e participação cidadã (Silva, Hoch e Righi, 2013; Bossi e Fialho, 2021; Cavalcante, 2018; Luciano, Wiendhoft e Dos Santos, 2018; Bairral, Silva e Alves, 2010; Navas, Morales e Lalinde, 2021).

Transparency is understood as a broad concept, encompassing two main forms: active transparency and passive transparency (Silva, Hoch, and Righi, 2013; Oliveira and Beck, 2022). In the case of active transparency, information is provided spontaneously, without the need for a citizen request. The information is made available automatically. On the other hand, in passive transparency, information is not offered proactively but rather in response to a public request. The authors argue that both forms are essential for the consolidation of democracy.

In a complementary manner, Luciano, Wiendhoft, and Dos Santos (2018) argued that the effectiveness of government transparency is amplified by the use of Information and

Communication Technologies (ICTs), as these tools have great potential for geographical reach, facilitating citizen participation.

Within this context, Navas et al. (2021) argued that, since transparency must be an ongoing process of providing information, it serves as an incentive for active citizen participation in the democratic environment. For these authors, the information provided must not only be constant but also relevant and useful to citizens.

Understanding transparency as one of the essential processes of accountability in public administration, Cavalcante (2022) emphasized that, by using Information and Communication Technologies (ICTs), governments can increase transparency in the public sector, as also pointed out by Luciano, Wiendhoft, and Dos Santos (2018). The reason for this is that transparency allows society to assess public management and, at the same time, verify its relation to social needs (Bairral, Silva, and Alves, 2010). In this context, active citizen participation goes beyond the simple obligation of paying taxes, engaging them meaningfully in governance issues.

By applying the methodology in his study, Visentini (2020) identified two forms of transparency: by activities and by objectives. In the first case, transparency covers activities related to decision-making, the formulation of public policies, and the results of these policies. Transparency by objectives, on the other hand, refers to administrative/institutional, political, and budgetary objectives that guide government actions.

Although it has already been mentioned, it is important to highlight again the relevance of ICTs in promoting transparency. This relationship is crucial for public administration to develop in a more efficient, accountable, and citizen-centered way (Moura, Brauner, and Muniz, 2020). It is through digital tools, such as transparency portals, open data platforms, and social media, that transparency becomes a concrete reality in the context of public management (Luciano, Wiendhoft, and Dos Santos, 2018; Visentini, 2021).

The use of ICTs and digital platforms expands the possibilities for closer interaction between government and citizens. The transformation of governments from an electronic to a digital model involves a broader transformation in which public administration embraces digital platforms to seek greater efficiency, effectiveness, and transparency.

1.4 Platformization

Before delving into the debate on platformization, it is essential to understand the concept of a "platform." According to Seo and Myeong (2021), a platform is considered “a useful tool that can reduce costs and increase value by connecting providers and users through a tangible or intangible base” (Seo & Myeong 2021, p. 2). Filgueiras, Palotti, and Nascimento (2022) highlighted the integrative and relational nature of platforms, stating that they are “virtual spaces that offer services in an integrated manner and establish interaction models with different types of users” (Filgueiras et al. 2022, p. 521). From a more technological perspective, a platform can also be defined as “an extensible software code base, supported by a system that provides core functionality shared by modules and interfaces that interoperate with it” (Repette et al. 2020, p. 2).

Poel (2019) noted that the concept of a platform emerged in the early 2000s when, even before the rise of major technology companies, the term was already being discussed in studies conducted in Japan, France, and the United States. Over time, several large companies gained prominence globally, becoming leading examples of the platform model in their respective markets.

Around 2005, with the rise of Web 2.0, the idea emerged that the internet had transformed into a platform, creating an environment where both users and businesses could thrive (Poel, 2019). One of the key contributions of this phase was the understanding that platforms function as two-sided markets. This concept originated from video game consoles, where platforms connected end users (buyers) with game creators (sellers). Parallel to the discourse on Web 2.0, the early concepts of platforms had a strong economic focus: attracting end users while simultaneously concealing the underlying business models and technological infrastructures. The goal was to encourage users to organize their activities around profit-driven platforms (Poel, 2019).

The literature on platform concepts is vast and diverse. To simplify understanding, these concepts can be grouped into several categories: platforms as intermediaries (Andrea, 2020; Frenken & Funfeschilling, 2021; Trinca, Papi & Albagli, 2022; Liang, 2022); platforms as infrastructures (Poel, 2019; Andrea, 2020; Stark & Pais, 2020; Van Dijck, 2020; Grabher, 2020; Frenken & Funfeschilling, 2021; Liang, 2022); platforms as ecosystem participants (Poel, 2019; Andrea, 2020; Van Dijck, 2020; Blank & Pybus, 2020; Grabher, 2020; Bonina, 2021); and platforms

as tools of power and/or control (Andrea, 2020; Stark & Pais, 2020; Van Dijck, 2020; Grabher, 2020; Blank & Pybus, 2020; Frenken & Funfeschilling, 2021; Bonina, 2021; Trinca, Papi & Albagli, 2022; Liang, 2022).

As intermediaries, studies discuss platforms as “time banks” (Liang 2022), a concept related to the sharing economy, where platforms are used to avoid the monetization of market transactions and promote a more equitable relationship between parties, treating time as a unit of value similar to community currency. Beyond this perspective, platforms have been understood as elements that reorganize interpersonal relationships, including aspects such as consumption and politics (Andrea 2020).

Still within the intermediation perspective, platforms have been analyzed as intermediaries of digital media and infrastructures between users (Trinca, Papi & Albagli, 2022). For these authors, the concept of "users" is broad, encompassing not only end users but also businesses and governments. Frenken and Funfeschilling (2021) explored a similar idea, emphasizing that online platforms function as market intermediaries, akin to traditional intermediaries such as taxi companies and media outlets, but with the additional ability to track participant data.

Regarding platforms as infrastructures, they have been studied as holders of software infrastructure, tools, rules, and services (Liang 2022); providers of digital, adaptable, and reprogrammable structures to facilitate interactions among users (Poell et al. 2020). Andrea (2020) observed that these platforms have a computational architecture based on connectivity and data exchange. Frenken and Funfeschilling (2021) also emphasized that platforms act as infrastructures, utilizing mediation and digital governance.

Grabher (2020) contributed the idea that platforms can act as providers of infrastructures that enable project development and application implementation for content selection. This concept aligns with Dijck's (2020) thinking, which highlighted the constant possibilities for change offered by platforms, paying particular attention to the adaptive dynamics required by users. Stark and Pais (2020), in turn, analyzed how the infrastructures created by platforms propose a new model of social organization, aggregating assets that do not belong to the company and creating economic-social value.

Platforms have also been considered integrators of an ecosystem. Van Dijck (2020) stated that platforms operating together form a platform ecosystem. This functioning can occur through

the interoperability between platforms (Andrea 2020) and their interconnection (Poell et al. 2020). The ecosystem environment brings together users, private and public actors (Blank and Pybus 2020); the participation of interdependent actors (Grabher 2020); and encompasses the participation of stakeholders and economic forces, including organizational and institutional forces (Bonina 2021).

Finally, in the last category mentioned, studies indicated that platforms also function as tools of power or control over people and the economy. In this context, platforms were perceived as operating in the technological, economic, and political dimensions, creating the conditions for exchanges made online (Andrea, 2020). Their influence in the economic field occurs through the capture and monetization of user data via algorithms (Trinca et al. 2020), which fosters the commodification of social spheres, shaping the economy and promoting markets and new business strategies by platform operators (Grabher 2020). These operators use the language of sharing to create a new economic narrative (Liang 2022).

Regarding control over individuals, Van Dijck (2020) highlighted the growing power of private platforms over people's lives. One way this power manifests is through the limitation of workers' well-being, influenced by the data and algorithms used. It is also important to note that the use of algorithmic management creates power asymmetries between individuals and institutions (Stark and Pais, 2020) and between knowledge, especially due to the expansion of editorial platforms (Trinca et al. 2022).

Another relevant point is that, as monopolies, platforms seek to dominate the web (Blank and Pybus, 2020), expanding their reach. In this context, platformization emerges as a process that favors technical integration, benefiting the monopolies already established in platform operations. The power gained by these platforms is so significant that they are eventually seen as private regulators (Frenken and Funfeschilling, 2021). In this role, they challenge institutions, actors, and other technologies (Bonina, 2021).

The concept of platformization is highly relevant and complex. On several occasions, it is observed that the same authors identify multiple aspects associated with platforms, which seems to reflect the impact of the various technological and social applications generated by the dynamics of creation, development, adaptation, and influence of platforms in society at large.

One of the developments of this topic in the governmental context is the idea of Government as a Platform, which will be addressed in the next section.

1.4.1 Government as a Platform

The emergence of the idea of 'Government as a Platform' occurred alongside the development of large global digital platforms. Tim O'Reilly was the one who introduced this concept, arguing that "encouraging the private sector to create applications that the government has not yet considered or does not have the resources to develop is the essence of a government as a platform" (BRASIL 2023).

In Brazil, a series of decrees materialized the legal concept of Government as a Platform, with the main ones being: Decree No. 8,777/2016, Decree No. 8,789/2016, and Decree No. 8,936/2016. These regulations aimed to establish the foundations for the creation of policies related to open data, data sharing in public administration, and the creation of platforms that facilitate the exercise of digital citizenship (Filgueiras et al. 2022).

Decree No. 10,046/2019 (BRASIL 2019) establishes the governance norms and guidelines for data sharing in federal public administration. Article 2 of this Decree presents a series of essential considerations for its understanding and application, including actions and roles of the institutions involved. This article consists of 25 items, and reading each of them clarifies their own implications. Below are the definitions of items VIII, XII, XIII, XVII, XVIII, XX, XXI, XXII, and XXIV, which illustrate the data sharing actions:

VIII - Data sharing: the availability of data by its manager to a specific data recipient;

XII - Availability: the property that information is accessible and usable on demand by an individual or a specific system, agency, or entity;

XIII - Data manager: the agency or entity responsible for the governance of a specific set of data;

XVIII - Interoperability: the ability of various systems and organizations to work together, ensuring that people, organizations, and computer systems exchange data;

XX - Data sharing mechanism: a technological resource that allows integration and communication between applications and services of the data recipient and data management agencies, such as web services, data copying, shared data lakes, and interoperability platforms;

XXI - Interoperability platform: a set of environments and technological tools, with controlled access, for sharing federal public administration data between agencies and entities specified in Article 1;

XXII - Data recipient: an agency or entity that uses data after being granted access permission by the data manager;

XXIV - Data requester: an agency or entity that requests access permission from the data manager. (Text amended by Decree No. 10.332, 2020).

More recently, Law No. 14,129/2021, known as the Digital Government Law (BRASIL 2024), introduced a new approach to the concept of Government as a Platform, establishing important guidelines for digital transformation in the public sector. This legislation aims to modernize public administration, making it more efficient, transparent, and accessible to citizens, by integrating technological solutions that promote the digitization of public services and the use of platforms to facilitate interaction between the government and society, as highlighted below:

Art. 4º (...) VII – Government as a platform: technological infrastructure that facilitates the use of publicly accessible data and promotes interaction among various agents, in a secure, efficient, and responsible manner, to stimulate innovation, economic activity, and the provision of services to the population.

Additionally, the same Law established that the concept of Government as a Platform is one of the principles and guidelines listed in item XXIII of Article 3. In this regard, the legislation emphasizes that data should preferably be anonymized to ensure compliance with the General Data Protection Law (LGPD), while also aiming at the formulation of public policies, the promotion of scientific research, the generation of business opportunities, and the strengthening of social control.

1.5 Digital Transformation

Digital transformation is seen as a strategy that relies on '[...] constant innovations in the digital technologies used by customers, with the aim of serving them in a customer-centric

manner' (Garcia 2020). According to the author, there are four key components that sustain this strategy: digital technology, demand, supply, and technological feedback.

In this way, digital transformation presents itself as a process of continuous adaptation to contemporary reality (Costa 2020). This process enables significant gains in productivity, greater agility in service delivery, cost reduction, and improvement of relationships with consumers.

It is important to emphasize that digital transformation is not limited to the application of technologies by organizations, but primarily involves '[...] the redesign of systems, workforce training, process automation, and strengthening the relationship with the ecosystem (suppliers, companies, citizens, and other government entities)' (Costa 2020, p. 39).

However, the process of digital transformation was initially treated as a simple technological innovation (Resnick 2002), also defined as the implementation of new digital technologies or the development of digital capabilities (Sandberg et al.2014). Over time, however, the concept of digital transformation has evolved and come to be understood as a broader approach, involving both the adoption of technologies and the transformation of the stages of processes and business models. This approach enables companies to position themselves more effectively as competitors in the global digital landscape (Kane et al.2017).

Authors such as Resego Morakanyane, Audrey Grace, and Phillip O'Reilly (2017) proposed a more robust and comprehensive concept, in which digital transformation is understood as an evolutionary process that adds value to customers by leveraging digital capabilities and using technologies to enable new business models.

On the MGI website (Brazil 2021b), the definition of digital transformation highlights three essential aspects: the delivery of quality services and the promotion of savings, both in terms of time and financial resources for citizens, as will be explored below.

Digital transformation in government means offering quality public services with less time and money spent by citizens, aiming to improve the lives of those who live and work in the country. The potential of digital transformation in the public sector is enormous. With the automation of services, the country substantially reduces its annual expenses and makes citizens' lives easier. The provision of these services and their improvements are better monitored, making the relationship between the state and the Brazilian people more direct and transparent (Brazil 2023).

This definition seems to focus more on the intended goals and benefits than on a more conceptual definition. However, it is important to remember that digital transformation can be materialized through digital tools that have great potential to transform the public sector and promote institutional changes that, in turn, transform governance practices. Digital transformation in governments is essential for public policy research (Filgueiras e Silva 2022, p. 509).

Additionally, when considering the concepts of digital transformation, it is important to highlight that this is a process through which organizations adopt a responsive approach to various environmental shifts. They have the ability to build, or even rebuild, the delivery of public value, which represents the value generated by the government (Filgueiras e Silva 2022).

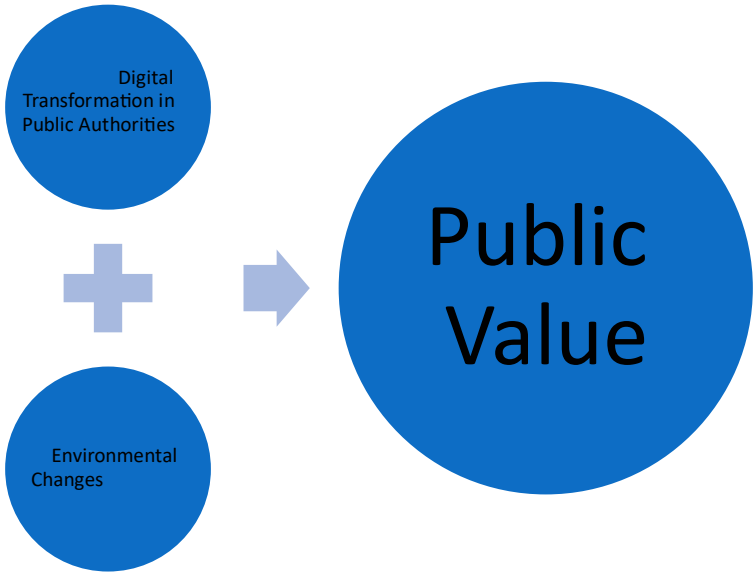


Figure 3 - Public Value

Source: authors' own elaboration

While digital technology tools promote the transformation of public institutions, the citizens benefiting from them receive better quality information and services at reduced costs (Brazil 2023). This idea is supported by De Moura (2020), who emphasizes that digital transformation has the potential to bring about such profound changes in institutions that they redefine their own strategies: “[...] their functioning and interpersonal and interorganizational relationships through the introduction of digital technology tools” (De Moura 2020, p. 199).

Given that digital technologies allow the integration of people and public organizations, even when geographically distant, two main benefits can be observed: citizens in remote locations can connect to public bodies that have digitized their work processes. This virtualization is facilitated by the evolution of cloud communication and the increased accessibility to technological devices. Furthermore, the expansion of internet services has been crucial for optimizing the exchange of information between citizens and government bodies (De Moura 2020).

In other words, digital transformation has had a significant social impact, “[...] changing the way businesses and the public sector are organized and managed, changes that are particularly evident in the implementation of new ICTs and the digitization of services” (De Moura 2020, p. 200).

In the specific case of the Brazilian government, Decree No. 9319, dated March 21, 2018, "Establishes the National System for Digital Transformation and sets the governance structure for the implementation of the Brazilian Strategy for Digital Transformation" (Brazil 2018). It is worth noting that this regulation:

[...] consists of a document with guidelines for the public sector and society, to coordinate various government initiatives related to the topic around a single, synergistic, and coherent vision, in order to support the digitization of production processes and capacity-building for the digital environment, promoting value generation and economic growth (Brazil 2023).

Although the goal of this paper is not to analyze the aforementioned document, it should be noted that this regulation reveals a conceptual alignment with the ideas mentioned in the previous paragraphs of this same section. One of the points to be observed is precisely § 1 of Art. 1. This excerpt highlights the objective of the present legislation. For better understanding, here is the transcription:

§ 1 The E-Digital, based on the thematic axes listed in Annex I of this Decree, aims to harmonize the initiatives of the federal Executive Branch related to the digital environment, with the goal of harnessing the potential of digital technologies to promote sustainable and inclusive economic and social development, with innovation, increased competitiveness, productivity, and employment and income levels in the country.

The text reveals the intention to use digital technologies innovatively, aiming to increase competitiveness and productivity. As this is a public policy that guides and structures the actions

to be followed by the Brazilian government, and as seen earlier, digital technologies are recognized for their relevance in today's world, with the government showing its intention to make the most of them. This will also have a positive impact on public agencies and the delivery of their services.

This aspect is highlighted in Annex I of Decree No. 9.319/2018, which addresses the thematic axes of the Brazilian strategy for digital transformation. In item II, which refers to the Digital Transformation Axes, the second axis concerns Citizenship and Government Digital Transformation. It is conceptualized as follows:

The purpose of digital transformation in government is to make it more dynamic and closer to the population, using digital technologies to catalyze social forces and productive dynamics for the benefit of society. The state must effectively integrate into the digital environment, providing efficient citizen service, integrating services and public policies, and ensuring transparency (Brazil 2018).

In other words, regarding this aspect, the Brazilian government has reinforced its stance on the use of digital technologies as a means to increase benefits to society. Among the objectives mentioned for digital transformation in this second axis, there are some that stand out and can be interpreted more broadly to encompass the idea of Government as a Platform, which is addressed in this research. The aforementioned regulation includes the following:

Provide broad access to information and open government data to enable the exercise of citizenship and innovation in digital technologies;Promote the integration and interoperability of government data bases; Implement the General Data Protection Law within the federal government and ensure the security of digital government platforms; Adopt cloud-based technologies for government processes and services as part of the technological infrastructure of federal public administration services and sectors (Brazil 2018).

These actions seem to align with the government's approach to the Government as a Platform strategy, though they should not be understood as exclusively limited to it. Next, we will move on to the methodology section.

Conclusion

Digital transformation in the context of government, through the adoption of the Government as a Platform (GaaP) model, has proven to be a crucial step toward modernizing

public institutions, providing greater efficiency, agility, and accessibility to the services provided. The literature review revealed that, over the past years, digitalization in the public sector has not been limited to the simple implementation of new technologies but has involved a profound transformation in governance structures, administrative processes, and citizen interaction.

The historical evolution of digitalization in government showed that the concept of GaaP goes beyond merely applying digital tools; it represents a paradigmatic shift that redefines power relations, public management, and public policy formulation. The participation of the Federal Public Administration (FPA) in this process has been central, with initiatives aimed not only at technological integration but also at strengthening the government's role as a facilitator of services and social innovation.

By mapping classical and recent approaches to the topic, it became clear that Government as a Platform is a growing trend that has been solidifying as a model capable of meeting the demands of contemporary digital society. However, for digitalization in the public sector to be truly effective, a continuous commitment to innovation, transparency, data protection, and the promotion of collaborative governance among different levels of government and citizens is required.

Therefore, digital transformation in government, by configuring itself as a digital platform, not only facilitates the delivery of services but also offers a new way of governing—more inclusive and participatory, aligned with the needs of an increasingly connected and digitalized society.

References

Andréa, C. d'. (2020). *Researching online platforms: Concepts and methods*. EDUFBA.

Bairral, M. A. da C., Silva, A. H. C. e, and Alves, F. J. dos S. (2015). Transparency in the public sector: An analysis of the annual management reports of federal public entities in 2010. *Revista de Administração Pública, 49*(3), 643–675. https://doi.org/10.1590/0034-76121457

Blanke, T., and Pybus, J. (2020). The material conditions of platforms: Monopolization through decentralization. *Social Media +*

Society, 6(4), 2056305120971632. https://doi.org/10.1177/2056305120971632

Bossi, A., and Fialho, A. (2021). Accountability and transparency in public administration in Brazil and SDG 16: Recent developments and future perspectives. *Cadernos da Escola do Legislativo, 23*(40), 82–112.

Bonina, C., Eaton, B., and Gawer, A. (2021). Digital platforms for development: Foundations and research agenda. *Information Systems Journal, 31*(6), 869–902. https://doi.org/10.1111/isj.12333

Brazil. (2019, April 11). *Decree No. 9,756 of April 11, 2019: Establishes the unified portal "gov.br" and sets forth the rules for unifying the federal government's digital channels.* https://www.planalto.gov.br/ccivil_03/_ato2019-2022/2019/decreto/d9756.htm

Brazil. (2023). *Government as a platform*. Brazilian Government – Digital Government. https://www.gov.br/governodigital/pt-br/governanca-dedados/governo-como-plataforma

Brazil. (2023). *GOV.BR reaches 90% of digitalized public services*. Brazilian Government: Digital Government, News section. https://www.gov.br/governodigital/pt-br/noticias/gov-br-alcanca-90-dos-servicos-publicos-digitalizados

Brazil. (2024). *National Digital Government Strategy*. Brazilian Government: Digital Government, Strategies and Digital Governance section.
https://www.gov.br/governodigital/pt-br/estrategias-e-governanca-digital/estrategianacional

Brazil. Presidency of the Republic. State Reform Chamber. (1995). *Master Plan for the Reform of the State Apparatus*. Brasília.

Castro, D. G., Kubo, E. K. M., & Farina, M. C. (2018). The performance of business administrators in public agencies: Organizational identification in a business-oriented educational context. *Cadernos EBAPE.BR, 16*, 186–203. https://doi.org/10.1590/1679-395168314

Cavalcante, P., & Carvalho, P. (2017). Professionalization of the Brazilian federal bureaucracy (1995–2014): Advances and dilemmas. *Revista de Administração Pública, 51*, 1–26. https://doi.org/10.1590/0034-7612154570

Cavalcante, P. (2018). Innovations in the federal government during the post-new public management era. *Revista de Administração Contemporânea, 22*, 885–902. https://doi.org/10.1590/1982-7849rac2018170240

Coelho, D. M. (2000). Essential elements of the managerial administration concept. *Revista de Informação Legislativa, 37*. Brasília.

Correia, P. M. A. R., Cardoso, R. L., Rosa, F. S. D., and Botelho, L. (2020). The evolution of the concept of public service in the context of state changes and political-administrative concessions: An integrative view. *Revista da FAE, 23*(1), 45–64.

De Almeida, V. A., and De Souza Diniz, B. (2020). Bureaucracy in public administration and the difficulty of its implementation in Brazil. *Revista Conexão Acadêmica, 11*(Dec.), 53–62.

De Faria, J. R. V., and De Faria, J. H. (2017). The conception of the State and Public Administration in Brazil within the scope of the Master Plan for State Reform. *Administração Pública e Gestão Social, 9*(3), 140–147. https://doi.org/10.21118/apgs.v9i3.4616

Dos Santos Maciel, C. S. F., Nascimento, E. C., and da Silva, D. F. (2020). Digital governance and public transparency: Advances, challenges and opportunities. *Liinc em Revista, 16*(2), e5240. https://doi.org/10.18617/liinc.v16i2.5240

Ferreira, W. S. S., Vale, G. M. V., and Bernardes, P. (2021). Innovation, disruptions, and economic cycles in technological platforms: Proposal of an analytical model. *Organizações & Sociedade, 28*, 495–518. https://doi.org/10.1590/1984-92302021v28n0023en

Filgueiras, F., Palotti, P. L. M., and Nascimento, M. I. B. (2022). Policy design and evidence use: The case of the GOV.BR platform 1, 2. *Revista de Administração Pública*, *56*(2), 324–348. https://doi.org/10.1590/0034-7612154570

Frenken, K., and Fuenfschilling, L. (2020). The rise of online platforms and the triumph of the corporation. *Sociologica*, *14*(3), 101–113. https://doi.org/10.2383/102385

Grabher, G., and König, J. (2020). Disruption, embedded: A Polanyian framing of the platform economy. *Sociologica*, *14*(1), 95–118. https://doi.org/10.2383/102379

Liang, Y., Aroles, J., and Brandl, B. (2022). Charting platform capitalism: Definitions, concepts, and ideologies. *New Technology, Work and Employment*, *37*(2), 308–327. https://doi.org/10.1111/ntwe.12185

Luciano, E. M., Wiedenhoft, G. C., and dos Santos, F. P. (2018). Barriers to enhancing transparency in Brazilian public administration: Structural and cultural issues or lack of strategy and governance? *Administração Pública e Gestão Social*, *10*(1), 45–68. https://doi.org/10.21118/apgs.v10i1.4616

Maia, T. S. V., and Correia, P. M. A. R. (2022). Challenges in implementing new public management. *Lex Humana*, *14*(2), 121–138. https://doi.org/10.21118/lexhumana.v14i2.4616

Moura, L. M. F. de, Brauner, D. F., and Janissek-Muniz, R. (2020). Blockchain and the technological perspective for public administration: A systematic review. *Revista de Administração Contemporânea*, *24*, 259–274. https://doi.org/10.1590/1982-7849rac2020190223

Oliveira, D. J. S., and Ckagnazaroff, I. B. (2022). Transparency as a key principle of open government. *Administração Pública e Gestão Social*, *14*(2), 45–68. https://doi.org/10.21118/apgs.v14i2.4616

Olivieri, C. (2011). Political controls over bureaucracy. *Revista de Administração Pública*, *45*, 1395–1424. https://doi.org/10.1590/S0034-76122011000600005

Peci, A., Pieranti, O. P., and Rodrigues, S. (2008). Governance and New Public Management: Convergences and contradictions in the Brazilian context. *Organizações & Sociedade*, *15*, 39–55. https://doi.org/10.1590/S1984-92302008000100004

Poell, T., Nieborg, D., and van Dijck, J. (2019). Platformisation. *Internet Policy Review*, *8*(4), 1–13. https://doi.org/10.14763/2019.4.1423

Possamai, A. J., and de Souza, V. G. (2020). Transparency and open government data: Possibilities and challenges from the access to information law. *Administração Pública e Gestão Social*, *12*(2), 45–68. https://doi.org/10.21118/apgs.v12i2.4616

Reis, M. L. (2014). State reform: From bureaucratic administration to managerial public administration: The Brazilian case. *Revista Foco*, *7*(1), 45–68. https://doi.org/10.1590/S1984-92302008000100004

Reptte, P. F. R., Sell, D., and Bastos, L. C. (2020). Government as platform: Critical success factors. In *Proceedings of the 10th International Congress on Knowledge and Innovation* (pp. 45–68). Ciudad del Saber, Panama. https://doi.org/10.1590/S1984-92302008000100004

Rodrigues, K. F. (2020). Unveiling the concept of transparency: Its limits, varieties, and the creation of a typology. *Cadernos EBAPE.BR*, *18*, 237–253. https://doi.org/10.1590/1679-395168314

Saraiva, L. A. S., and Capelão, L. G. F. (2000). The new public administration and the focus on the citizen: Bureaucracy vs. marketing? *Revista de Administração Pública*, *34*(2), 45–68. https://doi.org/10.1590/S0034-76122000000200004

Seo, H., and Myeong, S. (2021). Determinant factors for adoption of government as a platform in South Korea: Mediating effects on the perception of intelligent information technology. *Sustainability*, *13*(18), 10464. https://doi.org/10.3390/su131810464

Silva, R. L. da, Hoch, P. A., and Righi, L. M. (2013). Public transparency and the normative action of the National Justice Council. *Revista Direito GV*, *9*, 489–514. https://doi.org/10.1590/S1678-89312013000200004

Silva, E. F. B., Júnior, J. I., and Ceolin, A. C. (2019). Bureaucracy and public administration in the Brazilian state. *Revista de Administração Pública*, *53*(3), 45–68. https://doi.org/10.1590/0034-7612154570

Souza, C. (2017). State modernization and the construction of bureaucratic capacity for implementing federalized policies. *Revista de Administração Pública*, *51*, 27–45. https://doi.org/10.1590/0034-7612154570

Stark, D., and Pais, I. (2020). Algorithmic management in the platform economy. *Sociologica*, *14*(3), 47–72. https://doi.org/10.2383/102380

Tojal, F., and Carvalho, W. (1997). Theory and practice of state bureaucracy. *Revista de Administração Pública, 31*(1), 50–68.

Trinca, T. P., Papi, M. E. S., and Albagli, S. (2022). Platform capitalism and platformization in science. In *XXII National Research and Graduate Studies Meeting in Information Science*. https://enancib.ancib.org/index.php/enancib/xxiienancib/schedConf/presentations

Van Dijck, J. (2021). Seeing the forest for the trees: Visualizing platformization and its governance. *New Media & Society, 23*(9), 2801–2819. https://doi.org/10.1177/1461444820940293

Viegas, R. R., Barbosa, D. M. S., Silva, D. R. M., and Moraes, L. F. D. (2022). Communication by audit courts and public prosecutor's offices on social media: Accountability challenges in digital democracy. *Revista de Administração Pública, 56*, 324–348. https://doi.org/10.1590/0034-761220210132

Visentini, M. S., Barbosa, A. P. R., Dalmau, M. C. T., and Ferreira, L. M. D. (2021). Transparency in public management: Evidence from national scientific production and research agenda. *Revista Gestão & Conexões, 10*(1), 73–101. https://doi.org/10.13071/regec.2317-5087.2021.10.1.36794

Weber, M. (1982). *Essays in Sociology* (5th ed.). Rio de Janeiro: LTC Livros Técnicos e Científicos.

Welch, C., Piekkari, R., Plakoyiannaki, E., and Paavilainen-Mäntymäki, E. (2011). Theorising from case studies: Towards a pluralist future for international business research. *Journal of International Business Studies, 42*, 740–762. https://doi.org/10.1057/jibs.2010.55

Expanding the Concept of Entrepreneurship as a Boundary Object: Space and Community in Low-Resource entrepreneurship fairs in Latin America

Thiago Gomes de Almeida

Camila Braga Soares Pinto

Tatiana Dornelas de Oliveira Mendes

Cristina Sayuri Cortes Ouchi Dusi

Giovani Peterson Alves Mendes

Giovana Pedrette

Victoria Santos

Luiza Crispin Murta

Low-resource entrepreneurship fairs in Latin America represent a multifaceted phenomenon, acting as spaces of economic resistance, social inclusion, and community transformation in contexts of vulnerability. Despite the growing attention given to entrepreneurship in low-resource contexts (Morrish et al. 2019) and to the individual entrepreneur and their well-being in informal economies (Sridharan et al. 2014) within the field of Macromarketing, the literature lacks an in-depth analysis of how these informal markets, specifically formed by fairs, organize themselves to function as boundary objects (Fajardo et al. 2019) that facilitate the collaborative integration of these entrepreneurs—individuals made vulnerable in the formal economy and society—thereby contributing to the design of public policies promoting such activities.

This study aims to fill this gap by investigating how low-resource entrepreneurship fairs in Latin America operate as boundary objects that transcend the social, economic, and spatial barriers faced by such individuals. Drawing inspiration from the articulations of boundary object theories (Fajardo et al. 2019), theories on inequality and erasure presented by Epistemologies of the South (Santos et al. 2009), as well as the reflections of Brazilian geographer Milton Santos on city spaces and belonging (Santos 1978), the interconnections within the dynamics of overcoming boundaries and collaboration were analyzed, along with the political and economic modes of resisting inequality and seeking social, spatial, and cultural/symbolic representation inclusion through these markets.

In this sense, the central question guiding this research is: how do low-resource entrepreneurship fairs in Latin America transform into boundary objects that enable the

economic, spatial, social, and cultural inclusion of vulnerable entrepreneurs, overcoming existing barriers? Thus, the study's objective is to identify how low-resource entrepreneurship fairs are formed to overcome social, cultural, economic, and spatial barriers and create new opportunities for belonging in the city, strengthen collaborative support networks for ventures, and promote a sense of collective ethos among low-resource entrepreneurs.

To answer the research question and achieve the proposed objective, our interpretivist research, exploratory in nature, consists of an ethnographic investigation planned for 2 years, the first 7 months of which have already yielded partial results, reported herein. Six different low-resource entrepreneur fairs were identified, and the methodological path involved the following steps: 1) participant observation during the fairs over 7 months; 2) a first round of interviews with the founders and leaders of the fairs, aiming to understand their life stories and the fairs' trajectories; 3) a second round of interviews with the founders and leaders of the fairs, aiming to understand the operational mechanisms, performance, opportunities, and difficulties of the fairs.

The research is being conducted in Juiz de Fora, Minas Gerais, Brazil, where a growing movement of creating new entrepreneurial fairs has been identified, culminating in the creation of the League of Entrepreneurship Fairs (Liga das Feiras de Empreendedorismo). The researchers gained access to the League's leadership and, through them, accessed the entrepreneurs of each fair. The choice of Juiz de Fora as the research locus is justified by its relevance as a medium-sized urban center, with a Human Development Index (HDI) of 0.778 and a diversified economy, hosting a vibrant scene of informal markets. The city has approximately 600,000 inhabitants and stands out for its excellent logistical infrastructure and a progressive municipal regulatory environment, marked by the publication of several decrees between 2021 and 2024 to reduce bureaucracy for business startups, foster the creation of local productive arrangements, stimulate entrepreneurial culture, and promote local development. Among the decrees is the recent law (Law 14.746/2023) establishing the Municipal Innovation System. The strong presence of educational and research institutions, combined with the partnership between the city government and the university, further enhances the municipality's development, offering a rich context for analyzing the dynamics of low-resource fairs.

The study has relied on content analysis and participant observation to understand the importance of the fairs' role in operating as boundary objects. In this regard, contrasting the studies by Fajardo and colleagues (2019), who propose that the entrepreneurial activity itself is

the element responsible for operating as a boundary object, with our initial findings from the ongoing ethnographic investigation, we note a potential opportunity to expand this original concept. This expansion shifts the focus from the individual entrepreneur's activity to market spaces as boundary objects. In other words, through the immersive methodological journey within the city's fairs, the study has shown evidence of a shift from the boundary object being centered on the individual entrepreneur to the fairs operating as market spaces—organized and directed by collaborative entrepreneurial communities with potential strategic and market development—which then fulfill the role of the boundary object.

Low-resource entrepreneur fairs emerge with the function of serving as market spaces that catalyze change around the identification of a myriad of boundaries: territorial/spatial, economic, language/communication, aesthetic, perception and semiotic, mobility and displacement, belonging, social disparity, and political infrastructure and resources. The operation of the fairs has shown us a transgression of such boundaries and the promotion of inclusion and inequality reduction.

Table 1 summarizes the categories of boundaries identified in the initial analysis of our research data, expanding the original perspective of Fajardo et al. (2019) to incorporate spatial, aesthetic, mobility, and belonging dimensions, in line with the reflections of Santos (1978). It is observed that fairs act as catalysts for overcoming territorial boundaries and also accumulate the experiences and knowledge of marginalized communities (Santos 2019) by providing various types of access, such as to different city spaces; economic access through collaboration and income generation; language and communication access through knowledge exchange; aesthetic, perception, and semiotic access in the search for valorization; mobility and displacement access by concentrating supply and demand; belonging access by strengthening the collective ethos; access across social disparities by creating equitable opportunities; and infrastructure and resource access through joint organization. Additionally, the preliminary analysis points to the relevance of public policy boundaries, indicating the need for more specific and effective support for the sector, despite recent municipal initiatives.

Table 1: Synthesis of Expanded Boundaries Found in Data Analysis

Category	Description	Preliminary Research Findings

Territorial Boundaries	Geographic divisions affecting access to resources and opportunities	Difficulties in accessing opportunities; Impact on participation of distant entrepreneurs.
Economic Boundaries	High costs hindering participation in fairs and ventures	High costs of organizing fairs; Difficulty obtaining sponsorships and partnerships.
Language & Communication Boundaries	Barriers or facilitators linked to communication methods between different groups	Difficulty holding in-person meetings; Need to train entrepreneurs.
Aesthetic, Perception & Semiotic Boundaries	How space aesthetics affect perceptions of modernity and belonging	Prejudice against peripheral spaces; Spaces seek a more "modern vibe."
Mobility & Displacement Boundaries	Difficulties in access and transportation for business and development opportunities	Location affects exhibitor participation; Difficulty attracting local public.
Belonging Boundaries	Community's emotional or social connection to local spaces and activities	Difficulty attracting local public; Entrepreneurs feel displaced.
Social Disparity Boundaries	Differences in profile and economic capacity among entrepreneurs, affecting collaboration	Entrepreneurs without branding face more difficulties; Differences in access to training.

Infrastructure & Resource Boundaries	Difficulty affording infrastructure and event organization costs	Lack of access to spaces and financial support; Differences in revenue among entrepreneurs.

Source: Prepared by the authors.

As theoretical support for understanding the transformative role of low-resource entrepreneurship fairs, the research presents in its discussion an articulated analysis integrating the theory of boundary objects (Fajardo et al. 2019), Epistemologies of the South (Santos, 2019), and Milton Santos' reflections on space and inequality (Santos 1978) with the data revealed by the field study. The theory of boundary objects, as developed by Fajardo et al. (2019), offers a valuable lens for understanding how entrepreneurial activities can facilitate the reintegration of marginalized individuals into society. However, our study expands this perspective by finding evidence that, in the context of low-income communities, the fairs themselves function as boundary objects, connecting entrepreneurs to resources, networks, and opportunities that would otherwise be inaccessible, thus allowing us to assert that market spaces can also operate as boundary objects.

This theoretical expansion aligns with the Epistemologies of the South, which challenge Eurocentric views of knowledge and value the experiences and knowledge of marginalized communities (Santos 2019). By recognizing fairs as spaces where low-income entrepreneurs develop skills, share knowledge, and build collective identities, we value their contributions to strengthening the economy and society. Furthermore, Milton Santos' reflections on space and inequality provide a conceptual framework for understanding how fairs can transform urban space and promote social inclusion. Santos (1978) argues that space is not merely a physical setting but a social product that reflects and reproduces power relations. By creating spaces for meeting, exchange, and collaboration, fairs challenge spatial inequalities, promote the appropriation of public space, and enhance the sense of belonging to the city for marginalized communities.

In Latin America, low-resource entrepreneurship, notably in informal markets such as the *tianguis* in Mexico (García 2020) and *feiras livres* (free fairs) in Brazil (Ferreira et al., 2021), represents a fundamental strategy for subsistence and economic resistance in the face of socioeconomic inequalities (ECLAC 2022). These spaces transcend mere commercial transactions,

establishing themselves as places for collective learning, network strengthening, and economic empowerment in marginalized communities (Costa et al. 2021; Santos 2019; Silva and Oliveira 2020).

The analysis of our ongoing research suggests that the low-resource entrepreneur fairs in Juiz de Fora constitute dynamic market spaces that transcend purely economic logic, acting as platforms for inclusion and resistance. By facilitating the overcoming of multiple boundaries, these spaces promote belonging to the city and strengthen the collective ethos among marginalized entrepreneurs. The research, scheduled for completion in two years, will seek to deepen the relationship between the identified boundary categories and the emerging collaborative strategies within the fairs, contributing to the theoretical expansion of the concept of entrepreneurship as a boundary object, enhancing understanding of the role of these informal markets in transforming urban spaces and promoting social justice.

Thus, the study can contribute to supporting the development and implementation of new public policies aimed at reorganizing city spaces and transforming the urbanization model; valuing local identity, culture, and products; expanding the sense of belonging; and creating and strengthening collaborative support partnerships and networks. It may also support the construction and sharing of technical knowledge among entrepreneurs and fair organizers, contributing to poverty alleviation in territories marked by institutional voids.

References

BRASIL**.** Lei nº 14.746, de 5 de dezembro de 2023. Confere o título de "Capital Nacional das Águas" ao Município de Rio Grande, no Estado do Rio Grande do Sul. Diário Oficial da União: seção 1, Brasília, DF, 6 dez. 2023.

CEPAL. Panorama Social da América Latina 2021. Santiago: Comissão Econômica para a América Latina e o Caribe, 2021.

Costa, R. et al. (2021). Feiras comunitárias como estratégia de desenvolvimento local: um estudo de caso no Nordeste brasileiro. Cadernos de Gestão Pública, v. 8, n. 2, p. 112-128.

ECLAC, U. (2022). Preliminary overview of the economies of Latin America and the Caribbean.

Fajardo, A. B., Shultz, C., & Joya, J. C. M. (2019). Entrepreneurship as boundary object: Toward reintegration of Colombia's ex-militants into civil society. Journal of Macromarketing, 39(4), 368-384.

Ferreira, L. et al. (2021). O impacto das feiras livres na geração de renda pós-pandemia: evidências do Brasil. Revista de Empreendedorismo e Gestão de Pequenos Negócios, v. 10, n. 4, p. 78-95.

García, P. (2020). Mercados tradicionais no México: os tianguis como espaços de resistência econômica. Cidade do México: Editora Cultural.

Morrish, S. C., Eggers, F., Covin, J. G., & Ali, A. (2019). Perspectives on Entrepreneurship and Macromarketing: Introduction to the special issue. Journal of Macromarketing, 39(4), 353-357.

Santos, B. S. (2019). O fim do império cognitivo: a afirmação das epistemologias do Sul. Autêntica.

Santos, E. (2019). Feiras de empreendedores como estratégia de empoderamento econômico. Revista de Gestão Social, v. 11, n. 1, p. 12-28.

Santos, M. (1978). Por uma Geografia Nova. São Paulo: Hucitec, Edusp.

Silva, A.; Oliveira, R. (2020). Aprendizagem coletiva em feiras de empreendedores: um estudo exploratório. Revista de Empreendedorismo e Inovação, v. 9, n. 2, p. 34-49.

Sridharan, S., Maltz, E., Viswanathan, M., & Gupta, S. (2014). “Transformative subsistence entrepreneurship: a study in India”. Journal of Macromarketing, 34(4), 486-504.

Exploring Indigenous Food Systems in Arizona: Challenges in the Path Towards Food Sovereignty

Renée Shaw Hughner

Lauren Chenarides

Ashok Mishra

Claudia Dumitrescu

This study employs the food systems framework advanced by Nesheim et al. (2015) to explore the multifaceted challenges and opportunities facing food systems on tribal lands, with the ultimate goal of achieving food sovereignty. In this context, food sovereignty means ensuring Native communities have reliable, affordable access to fresh, culturally appropriate foods that support health, preserve cultural identity, and foster self-sufficiency.

The research identifies systemic bottlenecks spanning market dynamics, infrastructure, retailer behavior, regulatory barriers, and social structures. On the market front, consumer preferences are influenced by a heritage of ancestral food traditions, along with adaptations resulting from forced assimilation. This has spurred initiatives in agricultural education, community gardens, and resource-sharing networks among growers, aimed at reintroducing nutrient-rich indigenous foods while contending with entrenched preferences for processed products.

Infrastructure challenges further complicate food sovereignty efforts. Key issues include inadequate transportation networks, poor road conditions, and limited distribution outlets—compounded by unreliable internet connectivity, electricity (essential for refrigeration), and water access. Although funding is critical to address these gaps, complex land ownership structures and extensive federal red tape often hinder grant acquisition and effective infrastructure development. For example, even with significant investments like the Navajo Nation's $150 million trust fund for water infrastructure, challenges such as water rights disputes persist.

Retailer behavior on tribal lands is also complicated. Interviews with both a regional food chain and a national supermarket reveal that profitability, determined by factors such as population density, growth trends, and transportation infrastructure, is the primary driver for market entry. While strong community relationships and goodwill are primary benefits of retailer

presence, external retailers often perceive tribal sovereignty and its unique regulatory environment as significant hurdles.

Market structure and competition are also influenced by barriers to entry, including tribal and federal policies. A range of federal programs—such as SNAP, TEFAP, FDPIR, and WIC—play critical roles in shaping food distribution, yet their stringent requirements and the need for improved infrastructure often limit participation. Additionally, emerging Tribal Food Policies, like the Navajo Nation's Healthy Diné Nation Act, seek to protect Native seeds, promote local agriculture, and counteract the adverse effects of government subsidies on traditional diets.

Social organizations—including academic institutions, nonprofit agencies, food banks, and federal agencies—serve as key influencers by disseminating information, providing education, and supporting capacity-building initiatives. Institutions like Dine College and the University of Arkansas are actively involved in training future growers and distributors, while nonprofit groups work to shift the focus from mere food security to true food sovereignty that emphasizes nutritional quality and cultural appropriateness.

Finally, challenges in science and technology, particularly regarding water systems infrastructure, constrain production capacities. Limitations in storage, transportation, and refrigeration, as well as disparities in water access across tribes, underscore the need for sustainable solutions that address both operational and environmental challenges.

Collectively, these intertwined factors highlight the complexity of transforming food systems on tribal lands. Achieving food sovereignty will require an integrated approach that addresses market dynamics, infrastructural deficits, regulatory complexities, and social and technological challenges—ensuring that tribal communities can reclaim control over their food systems while preserving their cultural heritage.

Acknowledgement: This research was funded, in part, by the Schmidt Futures Alliance for the American Dream.

Reference:

Nesheim, M.C, Oria, M. and Yih, P.T. (2015) "A Framework for Assessing Effects of the Food System," Committee on a Framework for Assessing the Health, Environmental, and Social Effects of the Food System; Food and Nutrition Board; Board on Agriculture and Natural Resources; Institute of Medicine; National Research Council. Washington (DC): National

Academies Press. U.S. Available from: https://www.ncbi.nlm.nih.gov/books/NBK305181/ doi: 10.17226/18846

Exploring open-ended survey answers in (macro-)marketing research: Seeking Societal Insights

Alexandra Ganglmair-Wooliscroft

This paper is part of a larger research area the author has pursued for several years: the investigation of links between wellbeing and consumption from a category/meso-level perspective (e.g. Ganglmair-Wooliscroft, 2022; Ganglmair-Wooliscroft and Wooliscroft, 2019). It investigates 'what people enjoy purchasing, and why?' (Ganglmair-Wooliscroft 2023); or, 'what people enjoy purchasing, consuming and owning?' (Ganglmair-Wooliscroft 2024) – and how these hedonic consumption activities link to wellbeing measures. It builds insights into potential consumption patterns for societal well-being.

Multiple measures focusing on wellbeing, or facets of wellbeing, are available. The *Australian Centre on Quality of Life's* "Directory of Instruments" includes hundreds of - more or less established – quality of life and wellbeing scales, for example.

Capturing the breadth of consumption at a category/meso level is complex and has received little attention. Consumption includes products, services, experiences and ideas. It can range from buying necessities to buying luxury items; from consuming everyday products, to once in a lifetime experiences; from purchasing gifts, to addictive or destructive acts of consumption (Ganglmair-Wooliscroft 2022). Consumption can have - more or less, positive or negative, short- and/or long-term – impact on individual or societal wellbeing.

Existing research either focuses on one specific aspect/characteristic of consumption, or uses a highly aggregated indicator. An extensive research stream focuses on materialism, and finds that this form of (over-)consumption has mainly negative influences on wellbeing (Dittmar, et al. 2014; Kasser 2018). Other research explores specific consumption categories like experiential consumption (Van Boven and Gilovich 2003) or pro-social spending (Aknin, et al. 2013). These research streams generally explore the effect of one specific purchase – often in a primed setting (*imagine you are spending $ 50.- on* ...) – and generally conclude that either experiential or pro-social purchases have a bigger influence on wellbeing compared to 'material consumption'. On the other hand, when governments investigate consumption's impact on quality of life, 'consumption' is highly aggregated e.g. *New Zealand's Living Standard's*

Framework equates 'consumption' to 'average weekly household expenditure' (New Zealand Treasury n.d.).

These diverse approaches highlight the challenges to (quantitatively) capture the complexity consumption plays in people's life. The current paper explores a long-existing approach that has gained little attention in academic (macro-)marketing research: The application of open-ended survey questions.

Open-ended survey questions capture fuzzy constructs (Rouder et al. 2021). They have a somewhat 'bad' reputation as being used to explore issues "even if a researcher lacks sufficient knowledge about a topic", or to "identifying options that researchers have not thought of before" (Pietsch and Lessmann 2018, p. 93). In surveys, open-ended questions are frequently used to extend closed-ended questions (Rouder et al. 2021), for example 'please specify' that follows an 'other' category.

Open-ended questions can also be explicitly and consciously employed to gain short, top-of-mind responses on complex topics. They can "stand on their own as primary questions" (Rouder et al. 2021, p. 1) and provide a relatively "rich description of respondents reality at a relatively low cost" (Jackson and Trochim 2002). Open-ended questions are able to detect spontaneous responses (Pietsch and Lessmann 2018; Popping 2015) and can provide information about the salience of an issue (Greer 1991).

The current research employs a number of open-ended question relating to consumption as primary questions in a survey and this paper explores issue and challenges related to how to write qualitative questions, how to analyse them and how to present the findings from these questions.

Phrasing and presenting the open-ended question in the survey

Compared to instructions on how to write quantitative survey questions that can be found in every introductory market research textbook, less information is available on how to present primary questions as open-ended (Rouder et al., 2021). The introduction/framing and phrasing requires careful consideration and relies on the researcher's expertise relating to the topic of interest. In the current survey, the open-ended questions were placed at the very beginning of the survey to signal their importance to the respondents.

The introduction statement emphasized the breadth of consumption (*we buy, consume and own many 'things' – products, services and/or experiences – they can be small or big,*

necessities or luxuries…), as well as the hedonic wellbeing and the top-of-mind focus of this study (*thing you most enjoy*). It was also used to clearly set expectations that three blocks of open-ended questions were to follow with brief explanations about what we mean by *buying, consuming and owning*. See Figure 1 for the full introduction to open-ended questions.

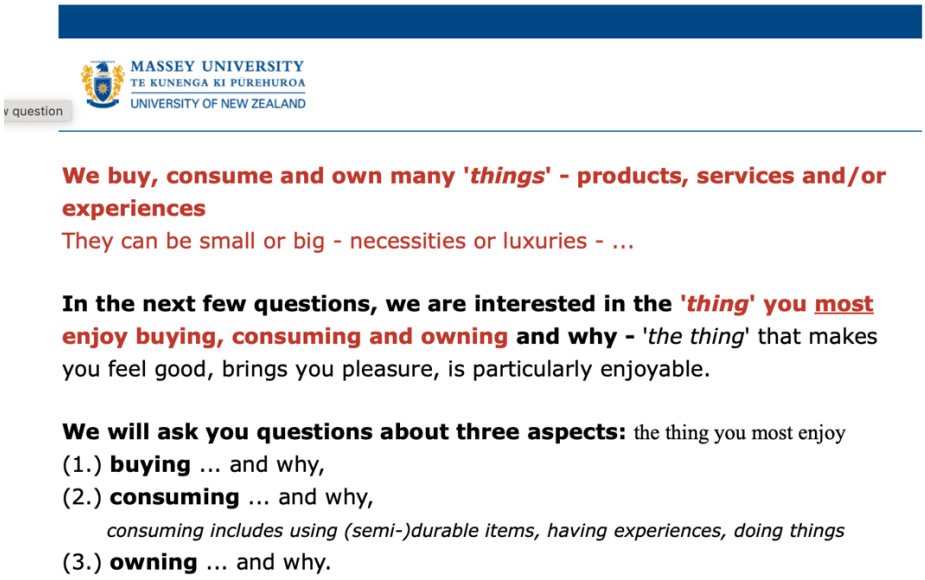


Figure 1: Introduction to open-ended question block

The introduction was followed by the three blocks of open-ended questions, as shown in the example for Block 1 – buying in Figure

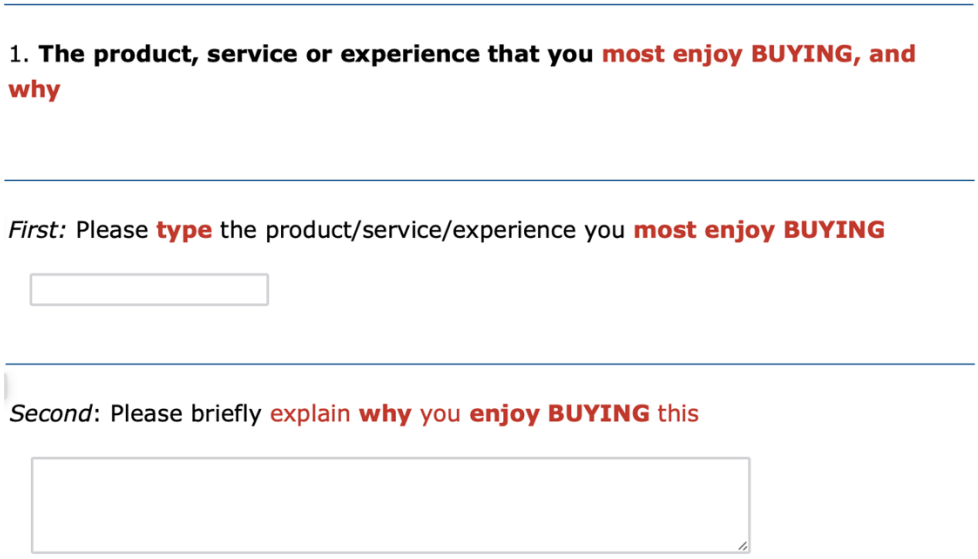


Figure 2: Example of Open-ended Question Presentation

Open-ended questions have a reputation of resulting in a lot of missing values. If open-ended questions are central to the survey topic and capture the respondents' interest, the

majority of people provide answers (see Greer 1988 for foundational research on this subject). The current research used an online survey and acquired 850 responses from a reputable market research company (Qualtrics panel). As part of the sample specification, responses to open-ended questions were specified as one of the data quality checks (in conjunction with standard attention - and other data quality checks (e.g. flatlining)). In the current study, 80% of respondents (677 respondents) provided useable answers to all six open-ended questions (3x2 questions).

Analysing open-ended responses

The systematic analysis of open-ended questions in surveys has gained relatively little attention although papers that traditionally dealt with that subject consistently state that "their analysis is associated with high workload" (Popping 2015, p.93). Open-ended responses traditionally require analysts to read, (interpret), and categorize the responses at least in part manually (Pietsch and Lessmann 2015). Open-ended answers generally contain short text entries that contain characteristics of list-type entries as well as narrative-like explanations and their "*free list in context* nature … can make it difficult to choose an appropriate methodology" (Jackson and Trochim, 2002, p. 308). In order to systematically analyse open-ended survey questions, some form of text analysis, or more specifically Content Analysis (Kassarijan, 1977) is frequently applied. Instrumental approaches follow a top-down approach and use fixed dictionaries while representational approaches rely on researchers to develop themes or categories based on their understanding of the data (Popping, 2015). Popping (2015) concludes that in short-answers to open-ended questions are collected, the distinction of these approaches is often difficult as manual (representational coding) and instrumental approaches (computer aided coding – e.g. word counts) are undertaken iteratively. The researchers/coder thereby plays an important role as "the investigator knows why the question is relevant and the content of the codes becomes more or less clear based on this relevance" (Popping 2015, p.31).

While this mix of representational and instrumental coding – or manual and computer coding – is the traditional approach, recent developments in computing and AI have promise new and efficient options for analysis. The researchers have undertaken a number of different analysis techniques to gain insights into what respondents' most enjoy buying/consuming/owning and why – starting from traditional manual and computer coding using Excel to widely available GenAI

programs and specific AI applications specialising in qualitative/short-text data analysis. Results will be presented at the conference.

Presentation of Open-ended / short text answers

The final point of consideration relates to how results of open-ended survey questions are presented. Their underlying mixed characteristics of being - too brief to be truly - qualitative, while at the same time being – too complex to be presented – quantitatively (except for listing frequencies), lends itself to visual representations. Even commonly available graphical representations like sunray-charts or tree-structure charts can help to visualise the (unique) results that can be gained from open-ended survey responses (Rouder et al,. 2021). Visualisation examples relating to the open-ended consumption questions will be presented at the conference and their level of insight compared.

Conclusions

Macromarketing is dealing with complex multi-layered constructs – including consumption (and Quality of Life, or wellbeing) - that are not easily dealt with using common research and analysis techniques. Open-ended survey questions provide one possible alternative to building understanding of complex societal phenomena, through the use of appropriate analysis and coding.

References:

Aknin, L. B., Barrington-Leigh, C. P., Dunn, E. W., Helliwell, J. F., Burns, J., Biswas-Diener, R., & Norton, M. I. (2013). Prosocial spending and well-being: Cross-cultural evidence for a psycholog ical universal. *Journal of Personality and Social Psychology*, 104(4), 635.

Australian Centre on Quality of Life (n.d.) "Depository of Instruments", available at: https://www.acqol.com.au/instruments#measures; accessed March 2025.

Ganglmair-Wooliscroft, A. (2024) "Stages of Consumption We Enjoy: Exploring Consumption and Hedonic Wellbeing", in: Proceedings of the 49th Annual Macromarketing Conference; eds: Pia Polsa & Petteri Repo, Helsinki, Finnland; p. 748-750 https://www.macromarketing.org/assets/proceedings/2024-macromarketing-proceedings.pdf

Ganglmair-Wooliscroft, A. (2023) "Consumption and Hedonic Wellbeing: a top-of-mind exploration", in: Proceedings of the 48th Annual Macromarketing Conference: With a Little Help from Our Friends; eds: Claudia Dumitrescu & Renee Hughner, Seattle, USA; p. 229-

236 https://www.macromarketing.org/assets/proceedings/2023-macromarketing-proceedings.pdf

Ganglmair-Wooliscroft, A. (2022) Quality of Life / Wellbeing and Consumption in: Krzysztof Kubacki; Lukas Parker; Christine Domegan; Linda Brennan (eds) *Routledge Companion to Marketing and Society*. Routledge, Chapter 6, pp. 93-108. DOI: 10.4324/9781003028079-9

Ganglmair-Wooliscroft, A., & Wooliscroft, B. (2019). Well-Being and Everyday Ethical Consumption. *Journal of Happiness Studies*, 20(1), 141-163. doi:10.1007/s10902-017-9944-0

Geer, J. G. (1988). What do open-ended questions measure?. *Public Opinion Quarterly*, *52*(3), 365-367.

Jackson, K. M., & Trochim, W. M. (2002). Concept mapping as an alternative approach for the analysis of open-ended survey responses. *Organizational research methods*, *5*(4), 307-336.

New Zealand Treasury (n.d) "Living Standards Framework – Dashboard", available at: https://lsfdashboard.treasury.govt.nz/wellbeing/, accessed: March 2025.

Pietsch, A. S., & Lessmann, S. (2018). Topic modeling for analyzing open-ended survey responses. *Journal of Business Analytics*, *1*(2), 93-116.

Popping, R. (2015). Analyzing open-ended questions by means of text analysis procedures. *Bulletin of Sociological Methodology/Bulletin de Méthodologie Sociologique*, *128*(1), 23-39.

Rouder, J., Saucier, O., Kinder, R., & Jans, M. (2021). What to do with all those open-ended responses? Data visualization techniques for survey researchers. *Survey Practice*.

Van Boven, L., & Gilovich, T. (2003). To do or to have? That is the question. *Journal of Personality and Social Psychology*, 85(6), 1193–1202.

Exploring Strength-based Approaches for Social Conflict Resolution: Hedonic Consumption Practices and Well-being Among Syrian Refugees in Türkiye

Zeynep Baktir

Ahmet Ekici

Social conflict, particularly in displacement contexts, creates ideological divisions, exclusion, and economic inequalities that hinder community integration and social well-being (Deutsch 1973; Coleman 2014). As millions of refugees worldwide seek to rebuild their lives in host countries, unresolved tensions between displaced populations and local communities present significant challenges to social cohesion. This study explores how hedonic consumption practices serve as a mechanism for conflict resolution, resilience-building, and integration by fostering economic interdependence, cultural exchange, and psychological stability among Syrian refugees in Türkiye (Barrios, Shultz and Montes 2019; Shultz and Peterson 2019). Rather than approaching refugees solely through a deficit-based lens that highlights hardship and dependence, this research adopts a strength-based approach to examine how consumption activities contribute to both individual well-being and broader societal harmony. Social gatherings, recreational engagements, and culturally significant consumption experiences act as facilitators for economic inclusion and mutual understanding, reducing perceived differences and tensions between refugees and host communities (Laczniak and Shultz 2021). Moreover, these activities provide refugees with agency in their consumer choices, allowing them to actively shape their identities and social belonging rather than remaining passive recipients of aid. Drawing on consumer vulnerability and transformative consumer research, this study integrates Keyes' (1998) social well-being framework to analyze the effects of hedonic consumption on social integration, contribution, coherence, actualization, and acceptance. The research employs a qualitative methodology, based on in-depth interviews, participant observations, and focus groups conducted with Syrian refugees in Türkiye between 2015 and 2019. Data were collected from four urban centers - Ankara, Gaziantep, Istanbul, and Kayseri - which host significant refugee populations. Given legal restrictions on audio recording, detailed field notes and translator-assisted narratives were used for analysis. A grounded theory approach guided data coding to identify recurring themes related to hedonic consumption, resilience, and conflict resolution. Findings reveal that hedonic consumption practices provide critical pathways for social conflict mitigation by enabling refugees to experience joy, strengthen social bonds, and maintain cultural

identity while simultaneously fostering positive economic exchanges between refugees and host populations (Shultz 2016; Manfredo and Shultz 2007). Social gatherings, entertainment, and retail consumption reinforce normalcy and agency, while participation in personal care, food consumption, and recreational activities foster emotional resilience and cross-cultural engagement (Mai, Rahtz, and Shultz 2014). These practices cultivate psychological capital (PsyCap), helping refugees maintain hope for the future, develop a sense of efficacy through agency in consumption, and enhance resilience by adapting to economic and social constraints. Furthermore, findings indicate that these experiences contribute to broader conflict resolution outcomes, improving refugees' perceived sense of belonging and self-worth while fostering a belief in social progress and mutual acceptance within host communities (Barrios et al. 2016; DeQuero-Navarro et al. 2020). Economic engagement through consumption practices also reduces host community resentment, as refugee consumer participation generates local business growth and employment opportunities. The study challenges traditional deficit-based models of consumer vulnerability by highlighting the agency and resourcefulness of refugees in leveraging consumption for well-being and conflict mitigation (Shultz et al. 2022). The implications for businesses, NGOs and policymakers emphasize the need to design inclusive consumer experiences that support refugee agency and integration rather than fostering aid dependency. Governments and businesses should consider policies that encourage shared consumption experiences, providing space for interaction between refugees and host community members to foster trust and cooperation (Levy and Zaltman 1975). Furthermore, the research contributes to macromarketing discourse by providing insights into how markets, marketing, and consumption practices shape conflict resolution and social cohesion in displacement contexts. The findings underscore the transformative potential of hedonic consumption as a peace-building mechanism, offering new perspectives on consumer resilience and adaptation in spaces of long-term displacement. By adopting a strength-based approach, this study advocates for a paradigm shift in understanding refugee well-being, highlighting the role of culturally sensitive business strategies and inclusive marketing policies in fostering sustainable social integration and reducing long-term social conflict.

References

Barrios, A., de Valck, K., Shultz, C. J., Sibai, O., Husemann, K. C., Maxwell-Smith, M., & Luedicke, M. K. (2016), "Marketing as a means to transformative social conflict resolution: Lessons from transitioning war economies and the Colombian coffee marketing system," Journal of Public Policy & Marketing, 35(2), 185- 197. https://doi.org/10.1509/jppm.15.151

DeQuero-Navarro, Beatriz, Barakat, Karine Aoun, Shultz, Clifford J., Araque-Padilla, Rafael A., and Montero-Simo, Maria Jose (2020), "From conflict to cooperation: A macromarketing view of sustainable and inclusive development in Lebanon and the Middle East," Environmental Management, 66, 232-247.

Deutsch, M. (1973), "The resolution of conflict: Constructive and destructive processes," American Behavioral Scientist, 17(2), 248-248.

Keyes, C. L. M. (1998), "Social well-being," Social psychology quarterly, 121-140. https://doi.org/10.2307/2787065

Laczniak, G. and Shultz, C. (2021), "Toward a doctrine of socially responsible marketing (SRM): A macro and normative-ethical perspective," Journal of Macromarketing, 41(2), 201-231. https://doi.org/10.1177/0276146720963682

Levy S. and Zaltman G. (1975), Marketing Society and Conflict. New Jersey: Prentice-Hall.

Mai, N. T. T., Rahtz, D. R., and Shultz, C. J. (2014), "Tourism as Catalyst for Quality of Life in Transitioning Subsistence Marketplaces: Perspectives from Ha Long, Vietnam," Journal of Macromarketing, 34(1), 28-44. https://doi.org/10.1177/0276146713507281

Manfredo, M. R. and Shultz, C. J. (2007), "Risk, Trade, Recovery, and the Consideration of Real Options: The Imperative Coordination of Policy, Marketing, and Finance in the Wake of Catastrophe," Journal of Public Policy & Marketing, 26(1), 33-48. https://doi.org/10.1509/jppm.26.1.33

Shultz, C. J. and Peterson, M. (2019), "A macromarketing view of sustainable development in Vietnam," Environmental management, 63(4), 507-519. https://doi.org/10.1007/s00267-017-0971-8

Shultz, C., Hoek, J., Lee, L., Leong, W., Srinivasan, R., Viswanathan, M., and Wertenbroch, K. (2022), "JPP&M's global perspective and impact: An agenda for research on marketing and public policy," Journal of Public Policy & Marketing, 41(1), 34–50.

Faith-Consistent Investing and Transformative Justice: Evaluating *Mensuram Bonam* through the Integrative Justice Model

Tina Facca-Miess

Nicholas Santos, SJ

Dominic Chai, SJ

Introduction

The role of finance and investment in fostering ethical, equitable, and socially just economies has gained increasing attention in recent years. While financial inclusion initiatives such as Buy Now, Pay Later (BNPL) have been critiqued for their potential to entrench economic vulnerabilities, faith-based investment frameworks offer an alternative vision—one that prioritizes the common good and transformative justice. *Mensuram Bonam* (MB), a Vatican-endorsed guide for faith-consistent investing, presents a normative ethical framework grounded in Catholic Social Teaching (CST), calling upon investors to align financial decisions with human dignity, sustainability, and integral human development. This study applies the Integrative Justice Model (IJM) (Santos & Laczniak, 2009) as an evaluative lens for MB, assessing its potential to drive transformative justice in financial markets.

Moreover, this study introduces a novel predictive methodology for assessing MB's real-world impact. Drawing on a validated model for predicting transformation in quality of life (TQL) (Facca-Miess, 2022), we propose a framework that systematically measures the extent to which financial interventions based on MB's principles deliver tangible improvements in beneficiaries' well-being. This research contributes to macromarketing by integrating ethical finance, social justice, and impact measurement, bridging theory with actionable insights for faith-driven investors and policymakers.

This study addresses two core questions:

1. To what extent does *Mensuram Bonam* align with the principles of the Integrative Justice Model (IJM)?
2. How can a predictive model for quality of life transformation assess the effectiveness of MB-aligned financial interventions?

Literature Review

Faith-Based Finance and Social Justice

Faith-based investment strategies, particularly within Catholic Social Teaching (CST), emphasize the primacy of human dignity, the common good, and economic justice (Turkson, 2022). *Mensuram Bonam* calls upon Catholic investors to integrate ethical considerations into financial decision-making, moving beyond conventional ESG (Environmental, Social, Governance) criteria to include moral discernment, social responsibility, and long-term sustainability (MB, 2022). This aligns with broader movements toward Socially Responsible Marketing (SRM) and faith-consistent investing (FCI), which seek to ensure that financial resources serve as instruments for positive societal change (Kaefer et al., 2025; Laczniak & Shultz, 2021).

The Integrative Justice Model (IJM) as an Ethical Lens

The Integrative Justice Model (IJM) (Santos & Laczniak, 2009) provides a normative framework for evaluating ethical exchanges in financial markets. IJM comprises five interrelated principles:

1. Authentic engagement with non-exploitative intent
2. Co-creation of value
3. Investment in future consumption
4. Genuine interest representation of all stakeholders
5. Long-term profit management

Applying IJM to *Mensuram Bonam* allows us to critically assess whether its principles foster true economic justice, sustainable development, and transformative outcomes for stakeholders. Previous studies have applied the IJM to subsistence markets, base-of-the-pyramid consumers, and transformative education initiatives (Santos et al., 2015) as well as to social marketing (Kennedy & Santos, 2019) and fintech (Kaefer et al., 2025). However, its application to faith-based investment strategies remains unexplored. This study extends IJM's scope by evaluating how MB-aligned investments deliver long-term, transformative justice for vulnerable populations.

Predicting Transformation in Quality of Life (TQL)

A key limitation in evaluating financial justice initiatives is the lack of standardized impact measurement tools. To address this gap, we employ a predictive model for TQL transformation, adapted from prior applications of IJM in impact assessment (Facca-Miess & Santos, 2016). This model identifies significant predictors of self-reported well-being improvements, helping organizations measure whether their investments genuinely enhance the lives of beneficiaries.

The method, initially validated in Jesuit Worldwide Learning (JWL) and refugee education programs, can be adapted for financial markets by assessing the impact of MB-aligned investments on marginalized communities (Santos and Laczniak 2022; Facca-Miess 2022). This aligns with calls for evidence-based impact assessment in ethical finance, ensuring that justice-oriented financial strategies lead to tangible improvements in economic stability, social empowerment, and long-term well-being (Weiss, 1998).

Methodology

Evaluating MB through the IJM Framework

To assess *Mensuram Bonam* against IJM's principles, we conduct a qualitative content analysis of MB's guidelines, mapping its investment criteria against IJM's five tenets. This allows us to determine the extent to which MB fosters authentic engagement, value co-creation, and long-term financial sustainability.

Building a Predictive Model for TQL Transformation

We employ a quantitative approach using multiple regression analysis to identify key predictors of transformation in quality of life (TQL). Our model, adapted from previous IJM applications in education and social entrepreneurship, follows these steps:

1. Data Collection: Surveys distributed to MB-aligned investors and beneficiaries measure perceived impact on well-being, rated on a 1-10 Likert scale.
2. Regression Analysis: Stepwise regression identifies significant predictors of TQL transformation, determining which investment decisions yield the greatest positive outcomes.
3. Validation: Findings are compared to existing case studies of MB-aligned financial initiatives to ensure robustness.

This approach enables faith-driven investors to make data-driven decisions, ensuring that financial resources are ethically allocated and measurably impactful.

Findings and Contributions

Aligning *Mensuram Bonam* with IJM

Preliminary findings suggest that MB strongly aligns with IJM's core tenets, particularly in its commitment to authentic engagement, investment in future consumption, and long-term profit management. However, gaps exist in stakeholder representation, as MB primarily addresses institutional investors rather than marginalized communities directly.

Predictive Impact Measurement

Our model confirms that investment decisions aligned with MB principles significantly predict improvements in quality of life, particularly in areas related to education, economic stability, and social inclusion. These findings underscore the potential of faith-consistent investing to drive transformative justice.

Implications for Ethical Finance and Macromarketing

This study contributes to the macromarketing discourse by integrating:

- Faith-based investment ethics (*Mensuram Bonam*)
- Normative justice frameworks (IJM)
- Empirical impact assessment models (TQL prediction)

By demonstrating how ethical investment practices can be measured and optimized, this research provides actionable insights for policymakers, financial institutions, and macromarketing scholars.

Conclusion

Mensuram Bonam represents a significant step toward embedding justice, equity, and social responsibility into financial decision-making. However, without rigorous impact measurement, its full potential may remain unrealized. By applying IJM and predictive TQL models, this study offers a framework for faith-driven investors to ensure their financial decisions genuinely transform lives at the margins.

Future research should explore longitudinal impact assessments, integrating qualitative narratives from beneficiaries to provide deeper insights into how faith-based finance fosters economic justice.

This work extends the macromarketing field by merging ethical investment, transformative justice, and data-driven impact assessment, offering a pragmatic roadmap for faith-aligned financial decision-making.

References

Aalders, R. (2022). *The digital banking revolution: How to compete in the new age of fintech and financial services.* Wiley.

Barber, B. R. (2007). *Consumed.* W.W. Norton & Co.

Bartels, R. (1976). *The history of marketing thought.* Grid Publishing.

Bebchuk, L. A., & Tallarita, R. (2020). The illusory promise of stakeholder governance. *Cornell Law Review, 106*(1).

Benton, R. Jr. (2015). Environmental ethics: Theory and implications for marketing. In A. Nill (Ed.), *Handbook of ethics and marketing* (pp. 238-262). Edward Elgar Publishing.

Demirgüç-Kunt, A., Klapper, L., Singer, D., & Ansar, S. (2018). *The global Findex database 2017: Measuring financial inclusion and the fintech revolution.* World Bank.

Ellen, P., Mohr, L., & Webb, D. (2000). Charitable programs and the retailer: Do they mix? *Journal of Retailing, 76*(3), 393–406.

Facca-Miess, T.M. (2022). Innovative applications for transformative justice for quality of life. In *Business Transformation for a Sustainable Future*. Edited by Samuel Petros Sebhatu, Bo Enquist and Bo Evardsson, Rutledge, 156-179.

Facca-Miess, T. M., & Santos, N. J. C. (2016). Assessing perceptions of the Integrative Justice Model propositions: A critical step toward operationalizing a macro model. *Journal of Macromarketing, 36*(1), 68-77.

Friedman, M. (1970, September 13). The social responsibility of business is to increase its profits. *The New York Times Magazine*, 32-33.

Gollnhofer, J. F., & Schouten, J. W. (2017). Macromarketing challenges: The political economy of migration. *Journal of Macromarketing, 37*(2), 118-130.

Grand View Research. (n.d.). *Buy now, pay later market size & growth report, 2023-2030.* Retrieved from https://www.grandviewresearch.com

International Labour Organization. (2022). *Global estimates of modern slavery: Forced labour and forced marriage.*

Kaefer, K., Luz Mora, G., and Santos, N.J.C. (2025). Socially Responsible Fintech Using Open Social Innovation. *Journal of Macromarketing, 45*(1), 105-112.

Kennedy, A.-M. (2021). Macromarketing and the challenge of wicked problems. *Journal of Macromarketing, 41*(1), 6-11.

Kennedy, A.-M., & Santos, N.J.C. (2019). Social fairness and social marketing: An integrative justice approach to creating an ethical framework for social marketers. *Journal of Social Marketing, 9*(4), 522-539.

Kumar, A., Sharma, R., & Singh, R. (2024). *Fintech innovations in credit and lending: Analyzing the BNPL boom.* Springer.

Laczniak, G. R., & Murphy, P. E. (2006). Normative perspectives for ethical and socially responsible marketing. *Journal of Macromarketing*, *26*(2), 154-177.

Laczniak, G. R., & Shultz, C. J. (2021). Toward a doctrine of socially responsible marketing: Insights from macromarketing. *Journal of Macromarketing, 41*(1), 7-22.

Lux, M., & Epps, D. (2022). The regulation of fintech and the need for consumer protections. *Harvard Business Review, 100*(3), 84-92.

Mackey, J., & Sisodia, R. (2014). *Conscious capitalism: Liberating the heroic spirit of business.* Harvard Business Review Press.

Migration Data Portal. (2023). *Migration statistics and trends.* International Organization for Migration.

Santos, N. J. C., & Laczniak, G. R. (2009). Marketing to the poor: An integrative justice model for engaging impoverished market segments. *Journal of Public Policy & Marketing, 28*(1), 3-15.

Santos, N. J. C., Laczniak, G. R., & Facca-Miess, T. M. (2015). The integrative justice model as transformative justice for base-of-the-pyramid marketing. *Journal of Business Ethics, 126*, 697-707.

Santos, N. J. C., & Laczniak, G. R. (2022). The Integrative Justice Model as a challenge-driven normative framework for sustainable and just business practices. In *Business Transformation for a Sustainable Future*. Edited by Samuel Petros Sebhatu, Bo Enquist and Bo Evardsson, Rutledge, 141-155.

Sheth, J. N., & Parvatiyar, A. (2021). Sustainable marketing: A call for paradigm shift. *Journal of Macromarketing, 41*(3), 289-308.

Shultz, C. J. (2017). Marketing as constructive engagement. *Journal of Macromarketing, 37*(1), 5-21.

Shultz, C. J., & Wilkie, W. L. (2021). The role of marketing in sustainable development. *Journal of Macromarketing, 41*(4), 383-399.

Stavins, J. (2024). Consumer credit behavior and the rise of buy now, pay later. *Federal Reserve Bank of Boston Economic Review.*

Turkson, P. K. A. (2022). *Mensuram Bonam: Faith-consistent investing for the common good.* Vatican City: Dicastery for Promoting Integral Human Development.

United Nations High Commissioner for Refugees (UNHCR). (2023). *Global trends: Forced displacement in 2022.*

Varey, R. J. (2010). Marketing means and ends for a sustainable society. *Journal of Macromarketing, 30*(2), 112-126.

Firearms as Cultural Objects

Benjamin Rosenthal

Massimo Airoldi

Introduction

Consumer studies and, specifically, consumer culture theorists, highlight how consumers and objects relate to each other from a humanistic and a more-than-human perspective (Beccanulli et al. 2024). From a humanistic perspective, consumption objects are tools for identity projects (Belk 1988), a key element in the social fabric and intersubjectivity of consumers and consumption gatherings such as communities (Muniz and Schau 2005) and subcultures of consumption (Schouten and McAlexander 1995). The cases of Harley Davidson riders (Schouten and McAlexander 1995) and Star Trek fans (Kozinets 2001) illustrate how objects provide social identities and afford certain ways of conduct. Proper engagement with the object is a form of cultural capital which enables social recognition and distinction within the group.Although these studies from a humanistic perspective are foundational in consumer culture theory and they provide invaluable knowledge on consumer-object relationships, there is a rising body of research from more-than-human perspectives that have reshaped how we understand consumer-object relationships (Canniford and Shankar 2013; Beverland et al. 2024). These studies adopt theoretical lenses such as practice theories (Canniford and Shankar 2013; Maciel and Wallendorf 2017), assemblage theory (Zanette and Scaraboto 2019; Huff et al. 2021), affordance theory (Pavlyuchenko and Dion 2024), and object-oriented ontologies (Franco et al. 2022). Overall, these studies bring objects and their material, communicative and symbolic qualities upfront in reshaping how we understand consumer-object relationships.

Although this vast literature provides invaluable knowledge about consumer-object relationships, we still have a limited understanding of consumption objects and consumer-object relationships from a sociocultural perspective imbued with meaning. We argue that approaching objects as eminently “cultural” artefacts can open novel theoretical pathways in consumer research.

Within the field of cultural sociology, cultural objects are those that individuals recognise as embodying “shared meanings” (Childress et al. 2021, p. 234). Cultural objects “enable and constrain perceptions, judgments, and behaviours, depending on their affordances.” (p. 234). Furthermore, cultural objects have “cultural power”, which “rests in it being both

interpretable and ambiguous enough to be commonly recognized but "used" in different ways." (Rawling and Childress 2021, p. 1452).

These notions are not entirely new within Consumer Culture Theory. Consumer culture scholars have studied cultural products through the notion of iconic brands (Holt 2006), as well as products and markets deeply injected with commonly recognisable cultural meanings. However, a closer look at the sociocultural ground of consumer-object relationships can help illuminate the complex webs of meaning (Geertz 1973) mediating and constituting consumption practices and identities.

This article investigates consumer-object relationships from the perspective of a particular cultural object: firearms. Accordingly, it asks: how are firearms constituted as cultural objects by social media influencers? It advances current knowledge on consumer-object relationships by offering a technical and aesthetic perspective of cultural objects and by showing how such a techno-aesthetic perspective fosters a type of consumer-product relationship of awe, passion and fun.

Methods and Materials

This paper combines principles of netnographic sensibility (Reid and Duffy 2018) with a digital methods approach (Caliandro and Gandini 2017). YouTube was selected for the study because it is based on visual content (i.e., videos) and it has social media influencers (SMIs) dedicated to the topic of firearms.

The second author identified YouTube channels which were popular and dedicated to producing firearms-related content to select 33 YouTube channels. Then, the first author adopted a stratified sampling method (Lewis et al. 2013) to select 12 to 16 videos from these channels (i.e., the ones with the most views, likes or comments). In total, 420 videos were analysed, adopting an ethnographic content analysis approach (Altheide 1987), adapted for social media (Airoldi 2021). The most common types of content involved the object — e.g., unboxing, product evaluation, demonstrations of the shooting experience and technical information. The analysis of SMIs' content involved visual and textual corpora. Following Bainotti (2024), the analysis combined video observation, note-taking, open coding, and the theoretical objectives of the project.

Findings

Firearms as a Technical Object

SMIs portray firearms as a technical object, lecturing their audiences about firearms. It is common to see 15-minute' videos in which SMIs spend half the time explaining the characteristics of the product, its manufacturing, its differences compared to other types of firearms, how to use it and other technical elements, for just in the final part of the video show the product in the shooting range.

Consumers' relationship with firearms on social media platforms constitutes a technical experience. Consumers get to know many of the informative and experiential aspects of the product — i.e., knowledge, power and usability. For instance, SB's most-watched video is a review of the Desert Eagle pistol. First, SB describes the product in detail — e.g., its parts, weight (around two kilos), ammunition, manufacturer, main uses (e.g., hunting), and pros and cons.

Firearms as an Aesthetic Object

Consumers' relationship with firearms on social media platforms also constitutes an aesthetic experience, involving awe, fun, and passion, especially when the product is being used (i.e., in the shooting range) and when the product is the centre of the videos (see Figure1).

The aesthetic experience is constituted when firearms are at the centre of the videos. SMIs frequently adopt a first-person shooter perspective to demonstrate the actual experience of using firearms. By adopting this perspective, SMIs demonstrate aesthetic elements of firearms (e.g., power and beauty) and create an awe experience.

SMIs also create an aesthetic experience through close-ups of the product, in its entirety or its components, as they present firearms models through product reviews.

The combination of technical and aesthetic elements creates awe, that is, a feeling of reverential respect, admiration and wonder, which is evidenced in the video comments.



Figure 1. Images from YouTube Videos

References

Airoldi, Massimo (2021), "The techno-social reproduction of taste boundaries on digital platforms: The case of music on YouTube," *Poetics,* 89, 101563.

Altheide, David L. (1987), "Reflections: Ethnographic content analysis," *Qualitative Sociology*, 10 (1), 65-77.

Bainotti, Lucia (2024), "How conspicuousness becomes productive on social media," *Marketing Theory*, 24 (2), 339-356.

Beccanulli, Angela A., Silvia Biraghi, and Rossella C. Gambetti (2024), "The consumer-object relationship debate in contemporary technoculture: a systematic review for a theory of the object," *Journal of Marketing Management,* 40 (11-12), 937-967.

Belk, Russell W. (1988), "Possessions and the extended self," *Journal of Consumer Research*, 15 (2), 139-168.

Beverland, Michael B., Karen V. Fernandez, and Giana M. Eckhardt (2024), "Consumer Work and Agency in the Analog Revival," *Journal of Consumer Research*, ucae003.

Caliandro, Alessandro, and Alessandro Gandini (2017), *Qualitative Research in Digital Environments: A Research Toolkit*, Routledge: New York.

Canniford, Robin, and Avi Shankar (2013), "Purifying practices: How consumers assemble romantic experiences of nature," *Journal of Consumer Research,* 39 (5), 1051-1069.

Childress, Clayton, Rawlings, and Nault (2021), "Genres, Objects, and the Contemporary Expression of Higher-Status Tastes," *Sociological Science,* 8, 230-264.

Franco, Paolo, Robin Canniford, and Marcus Phipps (2022), "Object-oriented marketing theory," *Marketing Theory,* 22 (3), 401-420.

Geertz, Clifford (1973), *The Interpretation of Cultures*. Basic books.

Holt, Douglas B. (2006), "Jack Daniel's America: Iconic brands as ideological parasites and proselytizers," *Journal of Consumer Culture,* 6 (3), 355-377.

Huff, Aimee Dinnin, Ashlee Humphreys, and Sarah JS Wilner (2021), "The politicization of objects: Meaning and materiality in the US cannabis market," *Journal of Consumer Research,* 48 (1), 22-50.

Kozinets, Robert V. (2001), "Utopian enterprise: Articulating the meanings of Star Trek's culture of consumption," *Journal of Consumer Research,* 28 (1), 67-88.

Lewis, Seth C., Rodrigo Zamith, and Alfred Hermida (2013), "Content analysis in an era of big data: A hybrid approach to computational and manual methods," *Journal of Broadcasting & Electronic Media,* 57 (1), 34-52.

Maciel, Andre F. and Melanie Wallendorf (2017), "Taste engineering: An extended consumer model of cultural competence constitution," *Journal of Consumer Research,* 43 (5), 726-746.

Muniz Jr, Albert M. and Hope Jensen Schau (2005), "Religiosity in the abandoned Apple Newton brand community," *Journal of Consumer Research*, 31 (4), 737-747.

Pavlyuchenko, Roman, and Delphine Dion (2024), "How the Materials of Objects Shape Consumption: An Affordance Theory Perspective," *Journal of Consumer Research,* ucae064.

Rawlings, Craig M., and Clayton Childress (2021), "Schemas, interactions, and objects in meaning-making," *Sociological Forum*, 36 (S1), 1446-1477.

Reid, Emma, and Katherine Duffy (2018), "A netnographic sensibility: Developing the netnographic/social listening boundaries," *Journal of Marketing Management,* 34 (3-4), 263-286.

Schouten, John W. and James H. McAlexander (1995), "Subcultures of consumption: An ethnography of the new bikers," *Journal of Consumer Research*, 22 (1), 43-61.

Zanette, Maria Carolina and Daiane Scaraboto (2019), ""To Spanx or not to Spanx": how objects that carry contradictory institutional logics trigger identity conflict for consumers," *Journal of Business Research,* 105, 443-453.

From Attachment to Aversion: Consumers' Perspectives on Consumer-Brand Relationship Deterioration

Julio Cesar Leandro

Delane Botelho

Introduction

Consumer-brand relationships have been extensively studied in marketing literature, with a predominant focus on strong and positive relationships (Fournier 1998). However, consumer relationships with brands can also deteriorate over time, leading to aversion and disengagement (Alvarez and Fournier 2013). Despite the importance of understanding negative consumer-brand interactions, little research has addressed how these relationships transition from attachment to aversion, particularly in the financial sector. Prior studies have explored various dimensions of consumer-brand relationships, emphasizing brand attachment (Park, Eisingerich, and Park 2013) and trust in commercial interactions (Bowlby 1973). However, there remains a gap in understanding the specific mechanisms that drive the breakdown of these relationships, especially in contexts where power asymmetry exists, such as creditor-debtor interactions. Creditors play a pivotal role in shaping financial relationships, yet their practices can contribute to consumer distress, fostering negative emotions and leading to brand rejection (Hill 1994; Hill and Kozup 2007).

This study seeks to fill this gap by investigating the deterioration of consumer-brand relationships in the context of over-indebtedness. By applying the attachment-aversion model (Park et al. 2013) and theories of power imbalance (Hill 1994), we explore how creditors' actions influence consumers' transition from brand attachment to aversion. Through qualitative analysis of over-indebted consumers' experiences, we provide insights into the key drivers of relationship breakdown, contributing to the literature on negative consumer-brand relationships and financial vulnerability.

Methodology

This research employs a qualitative approach, gathering narratives from 37 in-depth interviews with over-indebted consumers. Data were collected over 24 months through interviews, non-participant observations, and secondary sources, including reports and industry documents. The study was conducted in collaboration with a consumer protection agency in Brazil, which assists

individuals in renegotiating their debts. We applied a hermeneutic, iterative analysis to identify key themes in the evolution of the consumer-creditor relationship (Hill and Kozup, 2007).

Findings and Discussion

Our findings reveal that over-indebtedness serves as a critical relationship incident that activates consumers' attachment systems, prompting them to seek support from creditors. However, when they perceive a lack of support, frustration and negative emotions escalate, leading to a transition from attachment to aversion.

Participants in this study reported a gradual erosion of their relationships with creditors. This deterioration begins when financial difficulties arise and continues throughout the over-indebtedness process, including the renegotiation stage. According to consumers' perspectives, six key factors negatively influence their relationships with creditors and debt collectors, leading to deterioration:

. Disregard for the Consumer’s Situation

Consumers reported that creditors often fail to acknowledge their financial difficulties. Despite their willingness to pay, participants found that creditors offered rigid and unsustainable renegotiation terms, disregarding their financial constraints and previous positive credit history. The lack of empathy and flexibility contributed significantly to frustration and discontent (Hill and Kozup 2007).

. Disputes and Mistrust

Conflicts frequently emerged regarding the total amount of debt owed, interest rates, and contract conditions. Many consumers expressed disbelief at how their debts escalated due to compounding interest and penalties. Some described feeling deceived by unclear or misleading financial agreements, further damaging trust in their creditors (Hill 1994).

. Conflict of Interest and Disregard for Shared Responsibility

Participants highlighted how creditors aggressively promoted credit products without adequately assessing their ability to repay. While consumers admitted their role in taking on debt, they felt that financial institutions also contributed by encouraging excessive credit consumption without proper warnings about the risks. This imbalance led to feelings of betrayal and resentment (Hill and Kozup 2007).

. Use (and Abuse) of Power Imbalances

The power asymmetry in creditor-debtor relationships was a recurring theme. Creditors leveraged their superior position by unilaterally implementing measures such as freezing accounts, making unauthorized withdrawals, or blocking access to financial resources. Consumers felt disempowered and trapped in a system where they had little control over the resolution of their debts (Park et al. 2013).

. Harassment from Collectors (Direct and Third-Party Collectors)

Persistent and aggressive collection tactics exacerbated consumers' stress and dissatisfaction. Participants reported receiving excessive phone calls, intimidating messages, and even threats from collection agencies. Some described these tactics as psychological harassment, contributing to anxiety, fear, and emotional distress (Fournier 1998).

. Emotional and Psychological Toll on Consumers

As their financial problems worsened, many consumers experienced emotional distress, including feelings of humiliation, powerlessness, and hopelessness. The constant pressure from creditors and collectors had significant psychological effects, affecting their self-esteem and overall well-being. The experience of being treated as a financial liability rather than as a valued customer deepened the aversion toward creditors (Bowlby 1973). As a result of these factors, relationships once perceived as positive deteriorated into avoidance-driven relationships, enmities, or even enslavements, where consumers felt trapped by their financial obligations. The study extends existing literature on negative consumer-brand relationships, illustrating how brands can become liabilities rather than assets when they hinder consumers from achieving their goals.

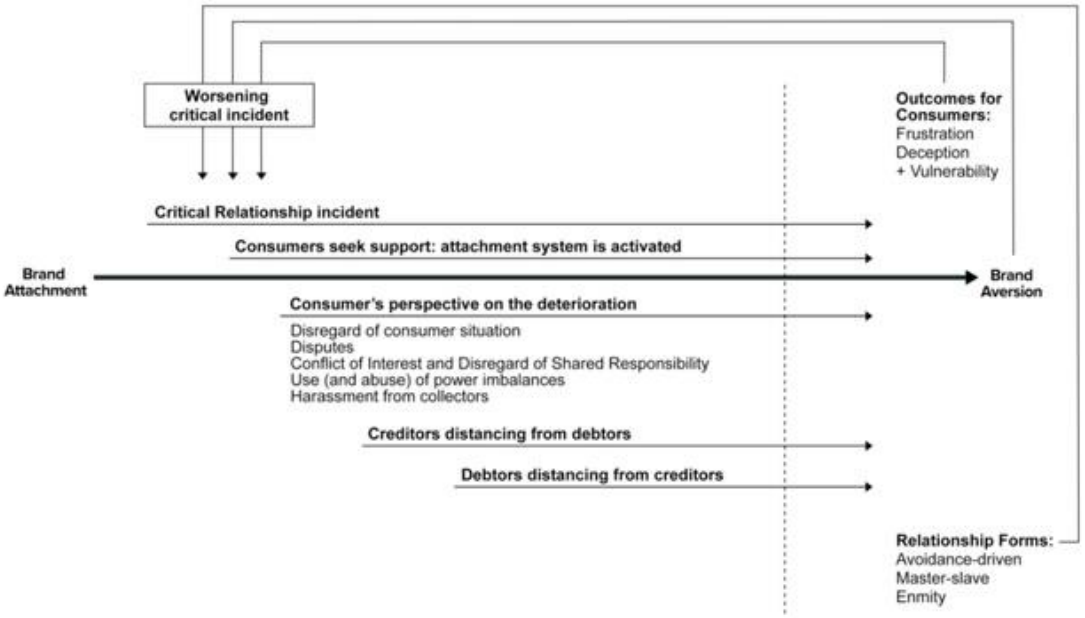


Figure 1. Model of Consumer-Brand Relationship Deterioration.

The model in Figure 1 outlines the transition of consumer-brand relationships from attachment to aversion, emphasizing the sequential phases of deterioration influenced by financial stress and creditor actions.

Conclusion and Contributions

This study contributes to the literature on consumer-brand relationships and financial well-being by providing a nuanced understanding of how and why relationships between consumers and creditors deteriorate. It extends prior work by Hill (1994) and Hill and Kozup (2007) by demonstrating that even traditionally non-predatory lenders can engage in practices that contribute to consumer distress. From a policy perspective, our findings highlight the need for regulatory measures to mitigate unfair credit practices and promote responsible lending.

References

Alvarez, C. and Fournier, S. (2013), Relating badly to brands. *Journal of Consumer Psychology*, 23(2), 253–264.

Bowlby, J. (1973), *Attachment and loss: Volume II: Separation, anxiety and anger*. London: The Hogarth Press and the Institute of Psycho-Analysis.

Fournier, S. (1998), Consumers and their brands: developing relationship theory in consumer research. *Journal of Consumer Research*, 24(4), 343–373.

Hill, R. P. (1994), Bill collectors and consumers: a troublesome exchange relationship. *Journal of Public Policy & Marketing*, 13(1), 20–35.

Hill, R. P. and Kozup, J. C. (2007), Consumer experiences with predatory lending practices. *Journal of Consumer Affairs*, 41(1), 29–46.

Park, C. W., Eisingerich, A. B., and Park, J. W. (2013), Attachment–aversion (AA) model of customer-brand relationships. *Journal of Consumer Psychology*, 23(2), 229–248.

From Ethics to Influence: The Rise of Corporate Moral Authority in Social Advocacy

Giuliana Isabella

Carlos Eduardo Lourenço

Nathalia Mello

Lucia Barros

Cristiane Pizzutti

In recent years, the expectation for companies to take clear stances on social and political issues, even those unrelated to their core businesses, has grown significantly. This shift reflects the emergence of a new dimension in corporate strategy known as Corporate Social Advocacy (CSA) (Dodd and Supa 2014). This expanded role of companies stems largely from the increasing demand by consumers, employees, and other stakeholders for organizations to exercise take stands that promote meaningful social change, which is only possible if they have enough moral authority to influence stakeholders (Hoppner and Vadakkepatt 2019). The rise of new moral authorities often occurs due to demonstrated moral behavior or as trust in traditional institutions declines (Hoppner and Vadakkepatt 2019). Therefore, understanding the concept of moral authority in the corporate context becomes critical for evaluating the effects of CSA and its influence on stakeholders.

Corporate moral authority (CMA), defined as the ability to influence others' morality based on perceptions of the entity as inherently moral, is crucial for shaping stakeholders' trust, loyalty, and corporate reputation (Hoppner and Vadakkepatt 2019). This concept has gained heightened relevance in an era of turbulent and polarized social and political discourse, reshaping who society views as sources of guidance (Cammarota et al. 2023). However, it is not clear what concepts form CMA. This study aims to create a robust definition of CMA and identify its dimensions by performing a systematic literature review and conducting 32 in-depth interviews with consumers and professionals submitted to discourse analysis and axial coding (Scott and Medaugh 2017).

Following the PRISMA protocol, we did a bibliographic review using the Web of Science database, complementing it with Google Scholar, and employing the keyword "moral authority" to identify relevant articles on moral authority. After filtering for academic papers with the term in the abstract and focusing on those that treated moral authority as a central theme, 90 articles were selected. After applying filters to include only studies related to management, business

administration, marketing, governance, companies, or scale development, 41 articles were selected. After carefully reading the complete papers, we had a final selection of 21 articles. The analysis of the 21 articles led to the identification of seven main concepts defining moral authority: Moral Influence (The ability to influence the morality of others through social sanctions, instruction, correct behavioral models, or ethical arguments based on values), Respect and Trust (Moral authority is earned through good character, knowledge, and the trust of followers regarding the leader's values and beliefs), Universal Values (Moral authority involves a commitment to universal human values and a shared vision, implying solid and justifiable moral principles), Legitimacy and Influence (The capacity to exert influence based on legitimacy, applicable in ethical, strategic, and political contexts), Social Relationships (Moral authority is mutually constructed among people and institutions, involving sources such as family, teachers, friends, and organizations that shape moral decisions), Moral Judgments (Related to the ability to influence moral judgments and corporate guidelines based on human rights and fundamental freedoms), and Moral Credibility (Refers to the credibility that makes actions or arguments morally persuasive and effective in promoting ethical behaviors). Based on this review, we define CMA as a skill or attribute that allows an entity, group, or corporation to influence the morality of others using power and platforms. This capacity is based on the perception that the entity is morally just, respectable, and trustworthy.

Next, the interviews were conducted in 2024 and involved participants across diverse demographics. Their objective is to capture the concept of CMA from an individual perspective. The interviews were transcribed and categorized into consumers and corporate representatives from different industries, ensuring a balance between perspectives. The interviews ranged from 29 to 70 minutes; their transcriptions were 368 pages long. Data were submitted to inductive thematic analysis (Clarke and Braun 2017), and four major themes emerged (see Table 1).

Table 1 – Themes and excerpts defining CMA

Themes	Definition	Excerpts
Conceptualizing CMA	What moral authority means and how companies operationalize moral stands and trustworthiness.	"A company with moral authority demonstrates concern for the well-being of its consumers." "A company with moral authority demonstrates concern for the well-being of its employees." "Honesty is fundamental to a company's moral authority."
Building and Cultivating CMA	Internal shared values and practices that define the moral standing of a company	"A company is perceived as moral when it internalizes its values." "A company with moral authority aligns its actions with the discourse it adopts." "A company's moral authority depends on an ethical history."
Communicating and Demonstrating CMA	Company external communication efforts to express and justify their actions and the narratives they adopt to give evidence of moral authority.	"A company with moral authority reflects its values in its public actions." "The true character of a company is revealed by its actions." "A company's moral authority is built by open dialogue about social issues."
Influence and Social Change	Company effective positive impact on moral values, driving social norms and influencing other stakeholders.	"A company with moral authority creates a positive social impact for society." "A company with moral authority influences its business partners."

		“A company with moral authority has the potential to influence social norms.”

These four themes offer a multidimensional perspective for understanding what constitutes CMA while providing an initial structure to guide theoretical development, operationalization, and empirical measurement. Future studies can decompose CMA into measurable components and how it captures CMA's internal (e.g., values) and external (e.g., customer perception) aspects.

References

Cammarota, Antonella, Mario D'Arco, Vittoria Marino, and Riccardo Resciniti (2023), "Brand Activism: A Literature Review and Future Research Agenda," International Journal of Consumer Studies, 47(5), 1669-1691. https://doi.org/10.1111/ijcs.12967

Dodd, Melissa D., and Dustin W. Supa (2014), "Conceptualizing and Measuring “Corporate Social Advocacy” Communication: Examining the Impact on Corporate Financial Performance." Public Relations Journal, 8(3), 2-23. Available online: http://www.prsa.org/Intelligence/PRJournal/Vol8/No3/

Hoppner, Jessica J., and Gautham G. Vadakkepatt (2019), "Examining Moral Authority in the Marketplace: A Conceptualization and Framework." Journal of Business Research, 95 (February): 417-427. https://doi.org/10.1016/j.jbusres.2018.07.045

Scott, Cliff, and Melissa Medaugh. (2017) "Axial Coding." in Matthes, Jörg. (ed.) The International Encyclopedia of Communication Research Methods. Hoboken, NJ: John Wiley & Sons, pp. 1-5. https://doi.org/10.1002/9781118901731.iecrm0012

Gastronomy as a Driver of Development: Connections Between Place Branding, Gastronomic Identity and Local Agro-Food Value Chains

Diogo Lannes Mello

Alessandra Baiocchi

Introduction

Creative economies and cultural branding strategies for cities have gained increasing attention from researchers, particularly in the context of marketing strategies oriented toward sustainable agro-food systems and the valorization of regional gastronomic identities (Gulisova 2022, Muñiz-Martinez and Florek 2023, Rinaldi 2017, Rinaldi et al. 2024). In Brazil, the recognition of national gastronomy has become more evident, especially due to the efforts of professionals in the sector to recover traditional knowledge and promote local culinary heritage. Local gastronomy emerges as a strategic development tool and a cultural asset in the construction of place brands (Campos et al. 2022, p. 124–125, Leoti et al. 2023, Matos et al. 2024, p. 29).

A document published by the Brazilian Ministry of Tourism, entitled Creative Cities of Brazil (2022), briefly updates the panorama of the twelve cities in the country recognized by UNESCO's Creative Cities Network. Among them, four cities are classified as Gastronomy Cities: Belém (PA), Belo Horizonte (MG), Florianópolis (SC), and Paraty (RJ). Established in 2004, UNESCO's Creative Cities Network now includes over 300 cities across seven groups, with the Gastronomy Cities group comprising 49 localities worldwide (UNESCO 2022, Yılmaz et al. 2020, p. 2).

The mapping of creative industries in Brazil, conducted by the Federation of Industries of the State of Rio de Janeiro (FIRJAN), shows in its 2022 report that these industries have consistently increased their contribution to the national economy since 2004. The so-called "Creative GDP" reached R$ 217.4 billion in 2020, surpassing even the mineral extraction sector (FIRJAN 2022, p. 813). The organization classifies creative industries into four main sectors: Consumption, Culture, Media, and Technology. Within the second sector, in the Cultural Expressions subgroup, the gastronomy industry is included.

In the Brazilian context, recent studies seek to understand how gastronomy can act as a vector of economic development for cities that do not yet have formal recognition but have the potential to structure public policies and private initiatives focused on food identity promotion and the strengthening of local agro-food chains (Henrique 2023, Leoti et al. 2023). These studies

have sought to identify socioeconomic impacts, challenges faced, and stakeholders' perceptions, as well as their implications for tourism and local brand management.

At the same time, recognized Gastronomy Cities are also the subject of research investigating the construction process and strategic planning challenges related to gastronomic tourism and place brand management (Brito and Botelho 2018, Junqueira and Anjos 2019, Machado et al. 2022, Matos et al. 2024, Mediotte et al. 2022, Moreira et al. 2025, Vogel et al. 2022).

The relationships between the gastronomic market, investments in agro-food systems, and the development of sustainable food chain models have been widely discussed in academia and have recently gained more attention. From a macromarketing perspective, some studies highlight that valuing local production—including connecting visitors to the cultural meanings and traditions of food from the perspective of local residents—is essential for building sustainable food systems, protecting cultural heritage, and fostering regional development through short food supply chains (Berg and Sevón 2014, Fusté-Forné 2023, Lopes et al. 2018, Shultz et al. 2005).

The gastronomic sector is also examined regarding how food certification initiatives influence agro-food systems, market strategies, and consumer engagement (Lopes et al. 2022, Newman et al. 2014, Thøgersen 2023, Thøgersen et al. 2019). Additionally, the literature discusses the impacts of food sector public policies on place brand management, as well as governance strategies focused on gastronomy (Donner et al. 2017, Grandi 2023, Rinaldi 2017, Rinaldi et al. 2024).

Notably, Askegaard and Kjeldgaard (2007) identified two opposing socio-economic impacts of utilizing gastronomic potential as a place branding tool. The authors argue that this process can lead to the dissolution of local cultures under globalization pressures, where branding strategies enable external homogenizing forces that shape food consumption. Conversely, place branding strategies can also be developed to create, promote, and protect short food supply chains, fostering local development without eroding cultural identity.

However, significant research gaps remain regarding the role of gastronomy in economic development and the enhancement of agro-food value chains, particularly in cities aiming to position themselves as gastronomic destinations (Gulisova 2022, Okumus 2020, Sio et al. 2021, Yong et al. 2022). Among the key opportunities for further research, scholars highlight innovation strategies, infrastructure improvements, and the role of gastronomy in strengthening place

images. Additionally, there is a need to analyze local governance strategies and how actors in the gastronomic market drive sustainable solutions and increase stakeholder engagement.

In this context, broadening the debate on gastronomy as a creative industry is essential. Particularly, an interpretative perspective is needed to understand the characteristics of this industry and how its dimensions are developed and leveraged by Brazilian cities.

Research Objectives and Methodology

This study aims to investigate the construction of Brazilian city brands based on their gastronomic potential and the relationship between this creative industry and the agro-food sector. It is based on the premise that gastronomy can act as a driver of economic and cultural development, fostering local production appreciation and influencing sustainable consumption patterns. The study intends to analyze how different Brazilian cities utilize their gastronomic identities to attract investment, promote gastronomic tourism, and establish connections between local producers, markets, and consumers. Ultimately, the research seeks to contribute to the understanding of the market dimensions of gastronomy and its impact on place branding strategies and the strengthening of regional agro-food value chains.

To achieve this, the study will employ a comparative case study approach, following the protocols established by Eisenhardt (1989) and Eisenhardt & Graebner (2007). The research will involve a qualitative analysis of selected cities, chosen based on their recognition as Creative Cities of Gastronomy or their potential to claim this identity. The study will examine gastronomic marketing strategies, public policies supporting the creative economy, and connections with local agro-food chains, adopting an interpretivist research paradigm.

Theoretical and Practical implications

By connecting gastronomic marketing to local agro-food chains, this study aims to provide insights for public policymakers, agro-food entrepreneurs, and stakeholders seeking to strengthen the gastronomic identity of Brazilian cities. Furthermore, it contributes to academic literature by expanding the understanding of gastronomy's role as a tool for cultural branding and territorial development.

This research is part of an ongoing doctoral project, which seeks to explore the relationship between gastronomy, place branding, and sustainable agro-food systems in Brazil. The study aims to generate both theoretical contributions and practical insights for policymakers and market actors involved in the development of creative cities and food-based economies.

References

Askegaard, S., and Kjeldgaard, D. (2007), “Here, there, and Everywhere: Place Branding and Gastronomical Globalization in a Macromarketing Perspective”, Journal of Macromarketing, *27*(2), 138–147. https://doi.org/10.1177/0276146707300068

Berg, P. O., and Sevón, G. (2014), “Food-branding places – A sensory perspective, Place Branding and Public Diplomacy”, 10(4), 289–304. https://doi.org/10.1057/pb.2014.29

Brito, L. M., and Botelho, D. (2018), “La gastronomía como marca de destino: Proposiciones en Minas Gerais – Brasil”. Estudios y perspectivas en turismo, *27*(2), 390–412.

Campos, R. P. de, et al. (2022), “Future research guidelines on soft power: An oblique approach of the literature on the intertwinement between creative industries and place branding”. ReMark - Revista Brasileira de Marketing, 21(1), https://doi.org/10.5585/remark.v21i1.20541

Donner, M., et al. (2017), “Place branding, embeddedness and endogenous rural development: Four European cases”. Place Branding and Public Diplomacy, 13(4), 273–292. https://doi.org/10.1057/s41254-016-0049-z

FIRJAN. (2022), Mapeamento da Indústria Criativa no Brasil. https://www.firjan.com.br/economiacriativa/downloads/MapeamentoIndustriaCriativa2022.pdf

Fusté-Forné, F. (2023), “Marketing places through food markets supply”, Food and Humanity, 1(12), 22–27. https://doi.org/10.1016/j.foohum.2023.03.001

Grandi, L. K. (2023), “Branding, Diplomacy, and Inclusion: The Role of Migrant Cuisines in Cities Local and International Action”, Societies, 13(7), 1–18.

Gulisova, B. (2022), “Place Branding for and Through Gastronomy”, Journal of Gastronomy and Tourism, 6(3), 154–169. https://doi.org/10.3727/216929722X16354101932087

Henrique, J. da S. (2023), “Analysis of the dynamics and specialization of creative activities in Brazilian capitals and UNESCO creative cities”, Diálogo com a Economia Criativa, 8(23). https://doi.org/10.22398/2525-2828.823125-149

Junqueira, L. D. M., and Anjos, F. A. dos. (2019), “CARACTERÍSTICAS E INFLUÊNCIAS DA DIMENSÃO ECONÔMICA DA GASTRONOMIA CRIATIVA DO RIBEIRÃO DA ILHA, FLORIANÓPOLIS/SC, BRASIL, PARA O TURISMO CRIATIVO LOCAL: ESTUDO DE CASO DE UMA CIDADE CRIATIVA

UNESCO DA GASTRONOMIA", Revista Gestão e Desenvolvimento, 16(2). https://doi.org/10.25112/rgd.v16i2.1826

Leoti, A. et al. (2023), "Creative Territory and Gastronomy: Cultural, Economic, and Political Dimensions of Tourism in Historic Brazilian Cities", Sustainability, 15(7). https://doi.org/10.3390/su15075844

Lopes, C., Leitão, J., & Rengifo-Gallego, J. (2022), "Place-Branded Foods with Responsible and Sustainable Management: A La Carte Serving in Regional Restaurants", Sustainability, 14(11). https://doi.org/10.3390/su14116615

Lopes, C., Leitão, J., and Rengifo-Gallego, J. (2018). Place branding: Revealing the neglected role of agro food products. *International Review on Public and Nonprofit Marketing*, *15*(4), 497–530. https://doi.org/10.1007/s12208-018-0211-9

Machado, A., et al. (2022), "Cidades criativas brasileiras da gastronomia: Histórico e vivência na pandemia da COVID-19", PragMATIZES - Revista Latino-Americana de Estudos em Cultura, 12(23). https://doi.org/10.22409/pragmatizes.v12i23.54844

Matos, A. et al. (2024). "Impacto do título de 'Cidade Criativa da Gastronomia' para a marca de Florianópolis, Brasil", Revista Turismo em Análise, 35(8), 16–37. https://doi.org/10.11606/issn.1984-4867.v35p16-37

Mediotte, E. J. et al. (2022), "EVIDÊNCIAS DA GOVERNANÇA NA GESTÃO DE CIDADES CRIATIVAS DA GASTRONOMIA: ANÁLISE DE AÇÕES COLETIVAS EM INSTÂNCIAS MUNICIPAIS NO CONTEXTO BRASILEIRO", Revista Inclusiones, 9(3), 24–57.

Ministério do Turismo. (2022), Cidades Criativas do Brasil, 24/6/2022, Ministério do Turismo do Brasil. https://www.gov.br/turismo/pt-br/centrais-de-conteudo-/publicacoes/copy_of_CidadesCriativas.pdf

Moreira, P. H. de O., et al. (2025), "Improving the Strategic Management of UNESCO Creative Cities of Gastronomy: Integrating Sensitivity Analysis and Tourism Destination Image Based on Analytic Hierarchy Process", Sustainability, 17(3). https://doi.org/10.3390/su17031008

Muñiz-Martinez, N., and Florek, M. (2023), "Food-based place branding as holistic place ecosystems: The case of Basque Gastronomic Ecosystem", Place Branding and Public Diplomacy, 19(1), 155–166. https://doi.org/10.1057/s41254-021-00222-6

Newman, C. L., et al. (2014), "Twenty Years of Country-of-Origin Food Labeling Research: A Review of the Literature and Implications for Food Marketing Systems", Journal of Macromarketing, 34(4), 505–519. https://doi.org/10.1177/0276146714529306

Okumus, B. (2020), "Food tourism research: A perspective article", Tourism Review, 76(1), 38–42. https://doi.org/10.1108/TR-11-2019-0450

Rinaldi, C. (2017), "Food and Gastronomy for Sustainable Place Development: A Multidisciplinary Analysis of Different Theoretical Approaches", Sustainability, 9(10). https://doi.org/10.3390/su9101748

Rinaldi, C., et al. (2024), "Unpacking a global spatial brand: Brand management practices in the UNESCO City of Gastronomy Network", Journal of Place Management and Development, 18(1), 1–19. https://doi.org/10.1108/JPMD-07-2023-0072

Shultz, C. J., et al. (2005), "When Policies and Marketing Systems Explode: An Assessment of Food Marketing in the War-Ravaged Balkans and Implications for Recovery, Sustainable Peace, and Prosperity", Journal of Public Policy & Marketing, 24(1), 24–37. https://doi.org/10.1509/jppm.24.1.24.63897

Sio, K. P., et al. (2021), "A Contemporary systematic literature review of gastronomy tourism and destination image", Tourism Recreation Research, 49(11), 1–17. https://doi.org/10.1080/02508281.2021.1997491

Thøgersen, J. (2023), "How does origin labelling on food packaging influence consumer product evaluation and choices? A systematic literature review", Food Policy, 119(8), 102-503. https://doi.org/10.1016/j.foodpol.2023.102503

Thøgersen, J., et al. (2019), "The impact of organic certification and country of origin on consumer food choice in developed and emerging economies", Food Quality and Preference, 72(3), 10–30. https://doi.org/10.1016/j.foodqual.2018.09.003

UNESCO (2022), Creativity and Cities. https://www.unesco.org/en/unesco-creative-cities-network/creativity-and-cities

Vogel, D., et al. (2022), "Florianópolis, Creative City of Gastronomy UNESCO". Journal of Culinary Science & Technology, 22(4) 1–15. https://doi.org/10.1080/15428052.2022.2068169

Yılmaz, G., et al. (2020), "How does a destination's food image serve the common targets of the UNESCO creative cities network?", International Journal of Tourism Cities, 6(4), 785–812. https://doi.org/10.1108/IJTC-07-2019-0115

Yong, R. Y. M., et al. (2022), “Taste your way across the globe: A systematic review of gastronomy tourism literature (2000-2021)”, Journal of Travel & Tourism Marketing, 39(7–9), 623–650. https://doi.org/10.1080/10548408.2023.2184445

GenAI literacy and the new product development process in the classroom

Maya Kumar

Julie Stanton

Forrest Watson

Alex Reppel

Stefanie Beninger

Understanding the wider ramifications of technology is a crucial concern in macromarketing (Hill and Dhanda 2006). One such technology is Generative AI (GenAI). The use of GenAI has started to penetrate all aspects of life, including work and education, yet learning about technology in non-technical courses has often been on an *ad hoc* basis. We have a limited understanding of the role of higher education in introducing GenAI literacy through subjects that have traditionally involved only human collaboration. This oversight is especially pressing in business subjects, where GenAI is heavily influencing business activities (Kumar et al. 2025). University and business school instructors, and especially those in marketing (e.g., Adiguzel et al. 2023; Ye, Kim, and Cho 2024), should nurture GenAI Literacy to shape socially responsible leaders who remain open to its evolving uses, implications, and multiple stakeholders, understanding the wider social ramifications of this technology (Beninger et al. forthcoming). The implications of GenAI are too ubiquitous and powerful to leave students unguided in how to use the technology thoughtfully and effectively.

This research builds on the encouraged use of small-scale interventions in different types of business classrooms (Beninger et al. forthcoming; Rodriguez-Tejedo and Etayo 2024). Here, the focus is on interventions for the use of GenAI in new product development (NPD) and the entrepreneurial process. This research aims to understand how the guided use of GenAI in the specific context of NPD in a learning environment will impact attitudes toward and confidence in using GenAI and whether it will result in better outputs not only for NPD, but also for the GenAI literacy of students.

GenAI literacy is an area of interest amongst scholars (e.g., Bozkurt 2024) and includes ensuring that students understand the technology (know what), use it (know how), and evaluate its outputs (know why), where all three aspects need to be assessed and appreciated within the wider socio-ethical landscape. “We must go beyond simple proficiency of personal use, and towards a deep and ongoing understanding of the meanings, uses, and potential implications

experienced by diverse stakeholders at a social level" (Beninger et al. forthcoming, n.p.). This is difficult as digital technologies such as GenAI are not merely tools. With technology as such understood as "a programming of nature" (Arthur 2009, p. 203), GenAI technologies are better understood as complex systems (Cilliers 2005) with specific tools and techniques forming components of those systems (Reppel 2023). While the basic principles of complex systems are often easy to understand, it is often difficult—impossible even—for non-experts to understand their inner workings. Given the ongoing integration into all aspects of our lives, GenAI has varying implications to a wide range of stakeholders, thus underscoring the relevance as a continuing topic in macromarketing discourse.

This research employs an experimental design with four sections of an undergraduate entrepreneurship course (second year, second semester, required course with approximately 55-60 students in each section, with two instructors, two sections each). Understanding the early stages of the entrepreneurial process, of which NPD is a central part, is a part of the learning objectives of the course and takes place over four double sessions. Two sections serve as the experimental group; two as a control group. Infusion of guided GenAI usage occurs across the two experimental class sessions, each of which is dedicated to different activities of the entrepreneurial process related to NPD. Students in the two control group sections are guided through the same activities of the entrepreneurial process, with the traditional human-only team approach.

The introduction of GenAI is as a supplementary tool where the experimental group receives structured training on how to approach this tool within the context of the course material. All students in both the control and experimental groups receive basic exposure to the potential advantages and disadvantages of GenAI usage in course assignments. Surveys capture distinct elements (see Table 1) that take approximately 10-15 minutes at the end of each session, utilizing principally categorical, Likert scale, and open-ended questions. The entrepreneurial outputs produced by students is also judged by experts using a multi-faceted rubric. The survey questions include scales of attitudes toward AI (Stein et al. 2024) and a GenAI acceptance scale (Yilmaz et al. 2024).

Overall, the project, which is being implemented during the Spring 2025 term, is anticipated to elicit a change in student attitude toward and understanding of GenAI and its advantages and disadvantages, as well as practical experience with this rapidly changing

technology as applied to an entrepreneurial context. Participants' responses to survey questions will be documented using the web-based survey software Qualtrics and will not collect any personally identifying information. These outcomes will be shared at the June conference.

Table 1: Stages of Research

Stage	Experimental group	Control group
1. Prior to exposure to the entrepreneurial process	Basic exposure to pros/cons of GenAI usage in course activities and assignments (no data collection) Baseline survey of personal characteristics and GenAI knowledge	Same as the Experimental group
2.Activity in the classroom (4 double sessions)	End-of-class activity "check-ins" to see what part of pedagogy is fruitful; Participants will be asked to briefly reflect on both the entrepreneurial process & GenAI after each activity	Same as the Experimental group (just no portion related to GenAI)
3.End of Project	Expert judgment of the quality of the developed entrepreneurial opportunity. Survey on student knowledge, attitudes toward GenAI, assessment of GenAI usefulness during the course project, and basic demographics.	Same as the Experimental group

As GenAI increasingly (re)shapes not only business, but also education, it behooves business educators and researchers to actively work to understand – and teach about – its implications not only in specific business areas, such as NPD, but also for a systems perspective on the diverse socio-ethical implications for society at large. This research will shed light on the effectiveness of a multi-session intervention aimed at strengthening GenAI literacy, towards cultivating a multi-stakeholder perspective of its implications across society.

References

Arthur, W. Brian (2009), The nature of technology, London: Penguin.

Adiguzel, T., Kaya, M. H., and Cansu, F. K. (2023), "Revolutionizing education with AI: Exploring the transformative potential of ChatGPT," Contemporary Educational Technology, 15(3), ep 429, 1-13. https://doi.org/10.30935/cedtech/13152

Beninger, Stefanie, Reppel, Alexander, Stanton, Julie, and Watson, Forrest (Forthcoming), "Facilitating Generative AI Literacy in the Face of Evolving Technology: Interventions in Marketing Classrooms," Journal of Marketing Education.

Bozkurt, Aras (Ed.) (2024), "Why Generative AI Literacy, Why Now and Why It Matters in the Educational Landscape?: Kings, Queens and GenAI Dragons," Open Praxis, 16(3), 283–290.

Cilliers, Paul (2005), "Complexity, deconstruction and relativism," Theory, Culture & Society, 22(5), 255–67.

Hill, Ronald Paul and Dhanda, Kanwalroop Kathy (2004), "Globalization and Technological Achievement: Implications for Macromarketing and the Digital Divide," Journal of Macromarketing, 24(2), 147–155.

Kumar, M., Beninger, S., Reppel, A., Stanton, J., Vlaminck, D., and Watson, F. (2025), "Your synthetic teammate: Enriching new product development with generative AI," Business Horizons. https://doi.org/10.1016/j.bushor.2025.02.008.

Reppel, Alexander (2023), "Digitization and Consumer Choice," in Kathy Kubacki, Lisa Parker, Christine Domegan, and Linda Brennan (Eds.), The Routledge Companion to Marketing and Society (pp. 41–54). Routledge.

Rodriguez-Tejedo, Isabel and Etayo, Cristina (2024), "From Talk to Action: How Small Steps Can Make a Big Impact in Marketing Education for Climate Action," Journal of Marketing Education, 46(2), 140–154.

Stein, Jan-Philipp, Messingschlager, Theresa, Gnambs, Tobias, Hutmacher, Florian, and Appel, Markus (2024), "Attitudes Towards AI: Measurement and Associations with Personality," Scientific Reports, 14(1), 2909.

Ye, Chen, Kim, Yongjun, and Cho, Yongjun (2024), "Digital Marketing and Analytics Education: A Systematic Review," Journal of Marketing Education, 46(1), 32–44.

Yilmaz, Fatma G. K., Yilmaz, Recep, and Ceylan, Mehmet (2024), "Generative Artificial Intelligence Acceptance Scale: A Validity and Reliability Study," International Journal of Human–Computer Interaction, 40(24), 8703–8715.

Gifted Bonds and Projects: Their Influence on Wellbeing and Quality of Life

Carolina Redolfi

Suzane Strehlau

Introduction

The World Health Organization defines Quality of Life as "an individual's perception of their position in life in the context of the culture and value systems in which they live" (World Health Organization, no date). This holistic framework encompasses physical health, psychological well-being, independence, social interactions, personal beliefs, and environmental connections. Among these domains, our research specifically focuses on personal relationships—a critical component of social interactions (World Health Organization 2012). Within this domain of social interactions, we particularly examine reciprocal relationships and their impact on wellbeing. Lévi-Strauss (1969) emphasized that societies form through reciprocal exchanges and gifted bonds—relationships maintained through mutual obligation that foster trust and interconnectedness.

Marketing research has primarily focused on specific goals (Ho and Wyer 2021, Stillman and Wooley 2023), with Fischer, Otnes, and Tucay (2007) introducing parenthood as a life project, but a significant gap exists regarding life projects and their relationship to social bonds. The study of gifted bonds aligns with macromarketing's concerns about market exchanges' impact on societal wellbeing (Wooliscroft 2020), as both examine how different forms of exchange systems contribute to collective outcomes beyond individual transactions.

Our research investigates how gifted bonds influence life projects and their broader impact on quality of life and wellbeing within the context of macromarketing systems, contributing to the growing body of work on how alternative exchange mechanisms affect aggregate wellbeing outcomes (Watson and Ekici 2017, Little et al. 2023).

Theoretical Framework

We draw on the concept of "Project" from social sciences, examining how individuals create plans to transform their current conditions (Boutinet 2002, Schutz 1970)—long-term commitments aimed at meaningful life transformation (Velho 1994). Life projects are inherently connected to Quality of Life improvement (Sirgy, Uysal and Kruger 2017), as they address perceived deficiencies in one's situation.

While life projects represent individual aspirations for transformation, they do not exist in isolation. Life projects are fundamentally social endeavors requiring others' involvement. "Gifted bonds"—relationships characterized by reciprocal exchange—provide emotional support necessary to overcome obstacles. The Theory of the Gift (Mauss 1990) conceptualizes the gift system as governed by giving, receiving, and reciprocating, creating networks of mutual obligation. When individuals fail to reciprocate, the social fabric weakens (Pereira and Strehlau 2016, Caillé & Vandenberghe 2015).

Integrating the Theory of the Gift into macromarketing expands our understanding of how non-market interactions influence broader market systems (Watson and Ekici 2017). This perspective aligns with what Mittelstaedt, Kilbourne and Shultz (2015) identify as a key macromarketing concern: how various exchange systems interact to shape quality of life at both individual and societal levels. Life projects involve consumption choices embedded within macromarketing forces such as societal norms (Wooliscroft 2020). Consumption practices impact psychological well-being (Dittmar et al. 2014), with their effectiveness depending on the social infrastructure surrounding these acts.

This research contributes to macromarketing's understanding of wellbeing by examining how alternative exchange systems (gifted bonds) operate alongside and sometimes in opposition to formal market exchanges, creating complex dynamics that shape collective quality of life outcomes (Ganglmair-Wooliscroft 2022).

Research Method

We adopted symbolic interactionism to explore participants' projects and trajectories (Blumer 1998), bridging micro-level individual experiences with macro-level societal outcomes (Wooliscroft and Ko 2023). This methodological approach aligns with recent macromarketing scholarship that emphasizes the value of individual narratives in understanding broader systemic dynamics (Little et al. 2023), particularly when examining non-Western and diverse cultural contexts.

We conducted 22 in-depth narrative interviews with diverse participants (15 women, 7 men, aged 18-63) from Canada and Brazil. While our data collection occurred at the individual level, our analysis aggregates these patterns to reveal how collective behaviors shape and are shaped by broader marketing systems. Using thematic analysis (Braun and Clarke 2006), we identified four distinct approaches to life projects and their associated impacts on quality of life.

Findings & Discussion

Our analysis revealed four distinct types of life projects, each with specific social bond patterns and different foundations for quality of life and wellbeing. Table 1 illustrates how these project types interact with market structures and consumption practices, revealing systemic patterns in how social relationships influence market engagement.

Project Types	My Project	Our Project	Lack of Project	Someone Else's Project
Aim of Project	Seeking the self	A future for us	Punctual goals	Obeying norms
Quality of Life & Wellbeing	Self-determined wellbeing; personal fulfillment; psychological autonomy	Collective wellbeing; shared achievements; relational satisfaction	Unstable wellbeing; short-term satisfaction; long-term dissatisfaction	External validation; achievement without fulfillment; potential identity conflict
Bond Types	Strong gifted bonds with friends who act as emotional support	Strong gifted bonds with family members	Weak gifted bonds. Individuals value a high level of interaction with others	Weak gifted bonds. Trust and respect for parents
Marketing & Consumption Implications	Consumption as identity expression; selective market engagement for personal growth	Collaborative consumption patterns; market choices prioritising collective wellbeing	Fragmented, reactive consumption; vulnerability to short-term marketing appeals	Status-driven consumption; market engagement based on external validation

Table 1: Types of Life Projects and Their Relationship to Wellbeing and Consumption

My Project: Self-Determined Wellbeing

Individuals in the "My Project" category prioritize self-determination, crafting life goals rooted in personal aspirations (Velho 1994). Despite strained familial ties, they cultivate strong "gifted bonds" with chosen friends, characterized by asymmetrical reciprocity (Mauss 1990). Their consumption patterns reflect selective engagement with market systems (Thompson 2014), using market resources to construct identity while relying on reciprocal friendships for emotional support.

Our Project: Collective Wellbeing

"Our Project" participants adopt a collective mindset, viewing personal goals as intertwined with family endeavors. Projects such as intergenerational homeownership require familial cohesion and mutual sacrifice. From a macromarketing perspective, these collective endeavors demonstrate how cultural systems foster collaborative consumption practices prioritizing group wellbeing over individual utility maximization (McAlexander, Schouten and Koenig 2002).

Lack of Project: Unstable Wellbeing

"Lack of Project" individuals exhibit fragmented, short-term decision-making without coherent goals. Their prioritization of immediate gratification undermines long-term wellbeing (Diener et al. 1999). This pattern reveals how fragmented consumer behavior may result from market systems emphasizing immediate gratification (Bauman 2007), showing that market systems alone cannot fulfill deeper social needs.

Someone Else's Project: External Validation

"Someone Else's Project" individuals passively adhere to externally imposed goals, typically parental expectations. While conformity may offer social stability, it significantly stifles autonomy—a key determinant of long-term wellbeing (Ryff and Keyes 1995). This category illustrates how traditional social systems can override individual agency, directing consumption toward externally validated achievements rather than authentic wellbeing (Arnould and Thompson 2005).

Integration: Projects, Bonds, and Market Systems

Our findings demonstrate the inseparability of life projects, social bonds, and market systems in determining wellbeing outcomes.'Our Project' illustrates how shared projects strengthen social networks, while 'My Project' initiatives demonstrate how individuals

selectively engage with market systems while maintaining non-market support structures. In contrast, "Lack of Project" or "Someone Else's Project" often leads to social fragmentation, undermining the resilience of broader economic systems.

This study demonstrates that the nature and strength of gifted bonds fundamentally shape how individuals engage with life projects, directly influencing their quality of life and wellbeing. Strong, collectively-oriented projects provide emotional support and shared purpose, fostering greater wellbeing. Contrastingly, weak or externally dictated bonds often lead to isolation and limited QoL improvements.

Our research contributes to macromarketing discourse by illuminating how non-market gifted exchanges operate alongside formal market systems to shape quality of life outcomes (Wooliscroft 2020). At the macro level, gifted bonds can enhance marketing system sustainability by fostering resilient communities capable of addressing broader societal challenges such as social inequality and resource distribution. This aligns with Mittelstaedt, Kilbourne and Shultz (2015) and OECD (2020) observation that marketing systems prioritizing collective wellbeing significantly enhance national wellbeing indices.

By supporting the vital role of gifted interactions in social cohesion, marketers and policymakers can contribute to more equitable and sustainable market outcomes that benefit overall societal wellbeing. This underscores the importance of understanding how different types of life projects interact with market structures to produce varying wellbeing outcomes for both individuals and communities.

Reference List

Arnould, Eric J., and Craig J. Thompson (2005), “Consumer Culture Theory (CCT): Twenty Years of Research,” *Journal of Consumer Research*, 31(4), 868–882.

Bauman, Zygmunt (2007), *Consuming Life*. Cambridge, UK: Polity Press.

Blumer, Herbert (1969), *Symbolic Interactionism: Perspective and Method*. Englewood Cliffs, NJ: Prentice-Hall.

Bourdieu, Pierre (1990), *The Logic of Practice*. Cambridge, UK: Polity Press.

Boutinet, Jean-Paul (2002), *Antropologia do projeto [The Anthropology of the Project]*. Porto Alegre, Brazil: Artmed.

Braun, Virginia, and Victoria Clarke (2006), “Using Thematic Analysis in Psychology,” *Qualitative Research in Psychology*, 3(2), 77–101.

Caillé, Alain, and Frédéric Vandenberghe (2015), "Neo-classical Sociology: The Prospects of Social Theory Today," *European Journal of Social Theory*, 19(1), 3–20.

Diener, Ed, Eunkook M. Suh, Richard E. Lucas, and Heidi L. Smith (1999), "Subjective Well-Being: Three Decades of Progress," *Psychological Bulletin*, 125(2), 276–302.

Dittmar, Helga, Rod Bond, Melissa Hurst, and Tim Kasser (2014), "The Relationship Between Materialism and Personal Well-Being: A Meta-Analysis," *Journal of Personality and Social Psychology*, 107(5), 879–924.

Dodge, Rachel, Annette Daly, Jan Huyton, and Lalage Sanders (2012), "The Challenge of Defining Wellbeing," *International Journal of Wellbeing*, 2(3), 222–235. https://doi.org/10.5502/ijw.v2i3.4

Fischer, Eileen, Cele C. Otnes, and Linda Tuncay (2007), "Pursuing Parenthood: Integrating Cultural and Cognitive Perspectives on Persistent Goal Striving," *Journal of Consumer Research*, 34(4), 425–440.

Ganglmair-Wooliscroft, Andrea (2022), "Quality of Life / Wellbeing and Consumption," in *Routledge Companion to Marketing and Society*, Kubacki, Krzysztof, Lisa Parker, Clifford Domegan, and Linda Brennan, eds. London, UK: Routledge, 93–108.

Godbout, Jacques T. (1998), *The World of the Gift*. Montreal, Canada: McGill-Queen's University Press.

Ho, Chankon M., and Robert S. Wyer (2021), "The Effect of Material and Experiential Consumption on Goal Pursuit," *Psychology & Marketing*, 38(12), 2305–2313.

Lévi-Strauss, C. (1969), The Elementary Structures of Kinship (J. H. Bell, J. R. von Sturmer, & R. Needham, Trans.). Boston: Beacon Press. (Original work published 1949)

Little, Victoria J., Ho H. P. Ho, and Binesh Eti-Tofinga (2023), "Not WEIRD at All! Towards More Pluralistic Economies and Sustainable Livelihoods," *Journal of Macromarketing*, 43(2), 190–214.

Mauss, Marcel (1990), *The Gift: The Form and Reason for Exchange in Archaic Societies*, W. D. Halls, trans. London, UK: Routledge. (Original work published 1925)

McAlexander, James H., John W. Schouten, and Harold F. Koenig (2002), "Building Brand Community," *Journal of Marketing*, 66(1), 38–54.

Mittelstaedt, John D., William E. Kilbourne, and Clifford J. Shultz (2015), "Macromarketing Approaches to Thought Development in Positive Marketing: Two Perspectives on a

Research Agenda for Positive Marketing Scholars," *Journal of Business Research*, 68(12), 2486–2491.

Organisation for Economic Co-operation and Development (OECD) (2020), *How's Life? 2020: Measuring Well-being*. Paris: OECD Publishing. https://www.oecd.org/statistics/how-s-life-23089679.htm (Accessed: 4 April 2025).

Pereira, Carolina R., and Suzane Strehlau (2016), "Social Bond Development Through Continuous Indebtedness," *Journal of Consumer Policy*, 39(2), 241–259.

Prasad, Pushkala (2005), *Crafting Qualitative Research: Working in the Postpositivist Traditions*. Armonk, NY: M.E. Sharpe.

Ryff, Carol D., and Corey L. M. Keyes (1995), "The Structure of Psychological Well-Being Revisited," *Journal of Personality and Social Psychology*, 69(4), 719–727.

Schutz, Alfred (1970), *The Phenomenology of the Social World*. Evanston, IL: Northwestern University Press.

Sirgy, M. J., Uysal, M., & Kruger, S. (2017), Towards a benefits theory of leisure well-being. Applied Research in Quality of Life, 12(1), 205-228.

Stillman, Philip E., and Kaitlin Woolley (2023), "Undermining Desire: Reducing Unhealthy Choices by Highlighting Short-Term (vs. Long-Term) Costs," *Journal of Consumer Research*, 50(3), 554–575.

Thompson, Craig J. (2014), "The Politics of Consumer Identity Work," *Journal of Consumer Research*, 40(5), iii–vii.

Velho, Gilberto (1994), *Projeto e metamorfose: Antropologia das sociedades complexas [Project and Metamorphosis: Anthropology of Complex Societies]*. Rio de Janeiro, Brazil: Jorge Zahar.

Watson, Francine, and Ahmet Ekici (2020), "Understanding the Dark Sides of Alternative Economies to Maximize Societal Benefit," *Journal of Macromarketing*, 40(2), 169–184.

Wooliscroft, Ben (2020), "Macromarketing and the Systems Imperative," *Journal of Macromarketing*, 41(1), 116–123.

Wooliscroft, Ben, and Eunju Ko (2023), "WEIRD is Not Enough: Sustainability Insights from Non-WEIRD Countries," *Journal of Macromarketing*, 43(2), 171–174.

World Health Organization (n.d.), *WHOQOL: Measuring Quality of Life*. https://www.who.int/tools/whoqol (Accessed: 2 April 2025).

World Health Organization (2012), *WHOQOL User Manual: Programme on Mental Health*. Geneva: World Health Organization. https://iris.who.int/bitstream/handle/10665/77932/WHO_HIS_HSI_Rev.2012.03_eng.pdf (Accessed: 2 April 2025).

Harnessing and Taming AI for the Classroom

Mark Peterson

The Problem

Marketing and macromarketing educators face challenges today in engaging students in both online and face-to-face settings (Groza et al. 2024). However, Bacon and Stewart (2022) caution that increased engagement must be targeted toward cognitive or behavioral learning outcomes. With the sudden arrival of generative artificial intelligence (AI), business leaders are now calling for marketing educators to give students experience with AI (Guha et al. 2024). In sum, marketing educators face the need to "hit a trifecta" in their courses—engaging students to more energetically pursue course learning objectives tied to AI that result in cognitive or behavioral outcomes.

Context for the Situation

Members of Generation Z (born in the late 1990s through the early 2010's) – now comprising cohorts of college students - are characterized as an anxious generation (Haidt 2024) uncertain about their prospects for the future. At this time, AI has emerged, but the impact on the lives of college students is predicted to be both positive and negative (Grewal et al. 2024). This would result in an attraction-avoidance situation for marketing students when confronted with the need to learn about AI and how it can affect their lives.

Four Proposed Solutions

Four assignments in an undergraduate sustainable business practices class (focused on macromarkting using *Sustainable Marketing: A Holistic Approach* (Peterson 2021) as a textbook) address the presence of AI for today's university students. The first two would be considered as going on the offense with AI for student learning, 1) the AI Turbo-Charged Career Consultation, and 2) the NHL Sustainability Stanley Cup, offer students the chance to use AI in developing their assignments about their own career and about a business (the National Hockey League). The third and fourth examples 3) the nuclear power in-class writing assignment, and 4) the oral exam on a macromarketing-related book, preclude the students from using AI. These last two can be considered as going on the defense against AI ruining

student learning opportunities, as the self-reported cheating in online learning environments has spiked to alarming rates of 59 per cent in some statistics courses (Stanoyevitch 2024).

These four assignments cohere because they represent how AI has and will affect higher education. AI offers a powerful tool for exploration of new domains (such as one's career path and how dozens of sports franchises pursue sustainability. But AI threatens the main task of higher education (helping students develop their own neural networks of their brains in the form of increased knowledge and skills of higher order thinking, such as effective writing and speaking, along with critical reasoning abilities) (Mayhew et al. 2016). Such personal developments result in positive benefits for society, such as increased earnings for those with college degrees and improved abilities of individuals to solve problems they encounter in life (Hout 2012).

These four assignments carry a societal dimension to learning. The career consultation shows how an innovation of business can impact the student's thinking about their own career path. The NHL assignment uses AI to bring understanding about how sustainability is being pursued in a marketing system, such as the NHL. The last two assignments show how the integrity of the learning process can be ensured through an in-class writing assignment (about a controversial renewable energy source—nuclear microreactors) and an oral exam (about feeding the planet in the future). In a macromarketing way, the last two assignments showcase what steps can be used to check the negative externality of widespread student cheating eroding the value of higher-order learning.

1. The AI Turbo-Charged Career Consultation. This assignment offers students a way for learning about AI and how it can affect their lives. As part of a sustainable business practices course, the following proposal for co-creation between student and teacher (Smørvik and Vespestad 2020) is made. Specifically, students can participate in an experiential learning assignment with AI focused on their own career called the "AI Turbo-Charged Career Consultation." The following comes from an undergraduate marketing course syllabus:

I would like to meet with you individually in my office to discuss career issues. Bring the following Generative AI results. This should take about 10 to 15 minutes each to discuss with me in my office (or in a Zoom meeting for online classes.).

Generative AI exercise to bring your prof:

Activate the search engine Copilot. Enter "Copilot" in the search window. Click on Copilot. You are now using Microsoft's version of AI. Ask Copilot to 1) develop a career path for you in [your area of interest] in [your most desired geographic location], then 2) ask for employers that fit your career launch in this locale.

My office hours will be the times for these: Tuesday 2:00 pm to 4:00 pm and Wednesday 4:30 – 5:30 pm. These will be conducted before Test 1. Grading is pass/fail, if we have a discussion - you pass (100 points). If you don't show up and discuss – you fail (0 points). Your career consultation with Dr. P is worth ***1 %*** *of your course grade. (Learning Objective Covered: gain knowledge about forces influencing consumers around the world.)*

Here is an example of Copilot's response for a student who played on the football team:

What firms within 50-miles of Hudson, WI would be good for a former defensive lineman in football who has a marketing undergraduate degree?

There are many firms within 50 miles of Hudson, WI that would be good for a former defensive lineman in football who has a marketing undergraduate degree. Some of the possible firms are:

- *Valpak of Rochester Direct & Digital Marketing: This is a firm that provides direct mail and digital marketing solutions to local businesses. They are looking for an advertising sales representative who can sell their products and services to potential clients. As a former defensive lineman, you can use your communication, persuasion, and competitive skills to sell effectively and build relationships with customers[1].*
- *Schmitty & Sons: This is a firm that offers transportation services, such as school bus, charter bus, and shuttle bus. They are looking for a social media content & marketing specialist who can create and manage their online presence and campaigns. As a former defensive lineman, you can use your sports knowledge, writing skills, and passion to create compelling content about transportation[2].*
- *J.Fletch Real Estate Group: This is a firm that specializes in residential real estate in the Twin Cities area. They are looking for a marketing coordinator who can oversee and maintain their social media presence, website, and events. As a former defensive lineman, you can use your leadership, teamwork, and strategic thinking skills to manage a marketing team and achieve your goals[3].*

These are just some examples of the firms within 50 miles of Hudson, WI that would be good for a former defensive lineman in football who has a marketing undergraduate degree. You can also explore other options by searching the web or using online job boards[45]. I hope this information helps you find a suitable career path for your interests and skills. 😊

Challenges or Alternative Perspectives

Students may need to employ prompt engineering to refine the results AI produces. However, AI can generate the first draft of a letter to firms introducing the student to the firm.

The AI results become the focus for a career consultation with students that now has more focus and more power. "I did not know this was possible!," or "I had heard about it (AI), but hadn't used it myself" are typical responses of the student in the career consultation. Rich discussions have ensued which were then connected to learning in the course. For those students who have devoted much thought and work previously in developing their career pursuits, the AI results are confirmatory. This is encouraging for these students. For those students just beginning to develop their career pursuits, the AI results are like an alarm clock going off. Students wake up to the realization that the phone number AI offers them on an open position in their career path as an entry-level position is like a key that now needs to be turned to open up a door. They are one step away from actually entering their career. There is an excitement about how close they are to launching their career.

2. The NHL Sustainability Stanley Cup. This assignment allows the students to use AI to research a National Hockey League franchise and how it focuses (or does not focus) on sustainability.

NHL Sustainability Stanley Cup

You and your partner will focus on one of the conferences in the NHL (such as the Central Division of the Western Conference and its teams of the Chicago Blackhawks, Colorado Avalanche, Dallas Stars, Minnesota Wild, Nashville Predators, St. Louis Blues). Dr. P will make this assignment. Your mission is to review and analyze the sustainability programming of each of these teams and rank them according to the worksheet provided below in the syllabus. You will conduct your research using search engines, such as Google. You are permitted to use AI tools, such as MS Copilot, too for obtaining information related to your worksheet.

Prior to February 20th, you and your partner will meet and rank the teams in your NHL conference based on your worksheets. In class on February 20th, you will meet with classmates representing the other conferences in either the AFC or the NFC. Together, you will discuss and make your joint recommendation of which team should go to the NHL Sustainability Stanley Cup. Before the end of class on February 20th, teams representing these NHL Eastern Conference and NHL Western Conference champions will make a two-minute pitch to argue for their team to win the NHL Sustainability Stanley Cup.

On your own (with no AI tools assisting you), write a one-page single-spaced memo using the heading format for your article summary (below). Explain (with specific examples) 1) what you learned in this assignment, 2) what was the best sustainability initiative about which your learned (and why), as well as 3) what other firms can learn from the best team in your NHL conference. Attach the worksheets for your NHL conference that you developed. Please type these and include in the MS-Word file with your one-pager (for a total of 1 plus 4 pages = 5 pages total). Upload your write-up online by class time Tuesday, February 25th. Worth 5 % of your course grade. (Learning Objectives Covered: 1 & 2)



Figure 1. Worksheet for Evaluating NHL Teams' Sustainability Programs.

Table 1. NHL Conference, Division, NHL Team.

Criteria	Strong (2)	Developing (1)	Weak (0)
Website Overall	Shows comprehensive approach to sustainability.	Shows multiple elements of a sustainability program, but not all.	None or only one element of sustainability presented. Looks like an afterthought.
Website People	Rich presentation of wide community impact recently.	Impact presented, but impact is narrowly focused. More details and development needed, such as photos or testimonials of impact.	No evidence or some evidence of impact.
Website Planet	Rich presentation of wide impact in recently regarding the natural environment.	Impact presented, but impact is narrowly focused. More details and development needed, such as photos or testimonials of impact.	No evidence or some evidence of impact.
Energy	Use of multiple renewable energies.	Use of a renewable energy.	No renewable energy used.
Water	Multiple H2O saving approaches.	A single H2O saving approach.	No H2O saving evident.
Waste Mgt.	Major effort for recycling/composting.	Some recycling/composting done.	No recycling/composting.

Green Bldg.	Major energy efficiency/sustainability effort.	Some energy efficiency/sustainability.	No energy efficiency/sustainability.
Fan engagement	Significant effort directed to education & participation programs.	Some education & participation programs.	No education & participation programs.
Innovativeness	Unique and effective initiative is readily evident.	Some evidence of innovativeness.	No evidence of innovativeness. Just doing what other teams are doing.
Sizzle	Sustainability efforts are made to be fun and attractive. Word-of-mouth likely to follow as fans talk about cool sustainability efforts.	Some evidence of sustainability efforts made to appear positively	Sustainability efforts are routine or ordinary.

Score: _____

Analysis:

1. What rank would you give this team on its sustainability program in its NHL Division? Why?

2. How could this team improve its sustainability program in the next year? Be specific.

3. What is the best idea/initiative of this team's sustainability effort? Why is it the best?

Academic Integrity and AI

One of the challenges of AI use in the classroom is the temptation it brings for students to copy and paste from Copilot or ChatGPT4 responses. By doing this, students short-circuit the learning process for themselves and therefore, do not strengthen their own abilities to create and refine their ideas in writing. A response to this is to have in-class writing assignments and oral exams.

3. Nuclear Power In-Class Writing Assignment:

Tuesday, April 8th, we will watch two videos on the future of nuclear power which present small modular reactors and nuclear microreactors which will produce less than 2 % of the energy of what current large-scale nuclear reactors produce. Dr. P will also present the results of a large-scale survey of citizens in Wyoming and Alaska about their perspectives of nuclear microreactor coming to their state. You will have the opportunity to discuss aspects about this innovative technology and how you feel about it. We will then take time to allow you to form your thoughts about nuclear microreactors and then write a letter to the editor of Cheyenne's Wyoming Tribune Eagle newspaper taking a stance on nuclear microreactors coming to Wyoming. This will be worth 5 % of your course grade (Learning Objective Covered: 1, 2 & 8).

4. Extra Credit Option - Book Discussion with Dr. P – Not the End of the World.

This book discussion is optional. Set up an office appointment with Dr. P for this. Be prepared to explain the strengths and weaknesses of the book listed below for a business person interested in pursuing sustainable business practices for the first time (like many graduating seniors will be). Also, explain how you would improve the book, if you became a co-author for the second edition of the book. Dr. P will ask other questions, too. You will be graded on 1) the completeness of your knowledge, and 2) the quality of your responses in the book discussion. The grading of your up to a 2 % bonus added to your final average. (Learning Objectives Covered: 1, 2, 3 & 7). Order from Amazon.com

1. Not the End of the World: How We Can Be the First Generation to Build a Sustainable

Planet, by Hannah Ritchie. ISBN: 9780316536752

2. *How to Feed the World: The History and Future of Food, by Vaclav Smil. ISBN-13 : 978-0593834510*

Future Research or Exploration Needed

Researchers can now go beyond the exploratory phase of using AI in the classroom to further evaluate the ability of the offensive uses of AI, such as 1) the AI Turbo-Charged Career Consultation, and 2) the NHL Sustainability Stanley Cup in achieving course learning objectives related to AI. All marketing courses can integrate these first two assignments to engage students about a transformative technology for marketing—AI—that is fun (Crittenden 2024). The second two assignments can preserve student learning opportunities for building their own neural network for critical thinking and for developing communication skills. In this way, these last two assignments can defend against student misuse of AI to subvert their own learning.

A fun exercise in future classes could be using AI to develop assessments of student learning that preserve the integrity of higher education. In this way, the threat of AI to learning integrity might be addressed by AI itself.

References

Bacon, D. R. and Stewart, K. A. (2022), What works best: A systematic review of actual learning in marketing and management education research. *Journal of Marketing Education*, *44*(1), 6-24.

Crittenden, V. L. (2024), What Is the Future of Marketing Education?. *Journal of Marketing Education*, *46*(1), 3-5.

Guha, A., Grewal, D., and Atlas, S. (2024), Generative AI and Marketing Education: What the Future Holds. *Journal of Marketing Education*, *46*(1), 6-17.

Grewal, D., Guha, A., and Becker, M. (2024), AI is Changing the World: For Better or for Worse? *Journal of Macromarketing*, *0*(0).

Groza, M. D., Groza, M. P., and Hasbrouck, S. (2024), Student Thinking Styles and Course Engagement in Online Versus Face-to-Face Marketing Courses. *Journal of Marketing Education*, 02734753241259488.

Haidt, J. (2024), *The anxious generation: How the great rewiring of childhood is causing an epidemic of mental illness*. Random House.

Hout, M. (2012), Social and economic returns to college education in the United States. *Annual review of sociology*, *38*(1), 379-400.

Mayhew, M. J., Rockenbach, A. N., Bowman, N. A., Seifert, T. A., and Wolniak, G. C.

(2016), *How college affects students: 21st century evidence that higher education works* (Vol. 1). John Wiley & Sons.

Peterson, M. (2021). *Sustainable marketing: A holistic approach*, SAGE Publications, UK.

Smørvik, K. K. and Vespestad, M. K. (2020), Bridging marketing and higher education: Resource integration, co-creation and student learning. *Journal of Marketing for Higher Education*, *30*(2), 256-270.

Stanoyevitch, A. (2024), Online assessment in the age of artificial intelligence. *Discover Education*, *3*(1), 126.

How cognitive strategies and decision-making processes support the leader's ability to identify and respond to unpredictable events through the interaction of effectuation and bricolage logic. - Nigerian case studies

Lorenzo Coronati

Frédéric Jallat

Purpose

Leaders may have many duties in pursuing activities, but one of the primary responsibilities is facing challenges that jeopardise their organisation's business and shareholders' satisfaction (both in the public and private sectors). Extensive research demonstrates that effective leadership with a structured decision-making process may suffer less from the peril of the unexpected (Sutcliffe and Vogus 2003). This empirical insight has encouraged researchers to examine how leaders respond to those external crises and threats, thus improving internal decision-making frameworks as a theoretical base for managing fatal disruptive events (Williams et al. 2017). Although researchers have extensively studied behavioural and organisational aspects, the decision-making process applied within complex and dynamic - because of but not limited to socio-cultural-religious and economic inputs - has yet to be deeply investigated. In this view, the Nigerian case studies can enhance and address a deficiency in comphrending crisis management.

We believe that the three main causes of current research gaps can be ascribed to the following reasons:

1. a predominance of macro-analysis of external factors;
2. an emphasis on developed economic settings;
3. research frameworks that rely on one-dimensional behavioural constructs.

Following a different perspective and a novel approach, we decided to explore how top managers and leaders are able to navigate change and adversity through a better decision-making process in complex and less predictable environments.

Based on this assumption, our empirical contribution seeks to investigate the role of different decision-making processes that, with the interplays of appropriate cognitive approaches, can address unforeseen crises in particularly turbulent geopolitical contexts, such as Nigeria today (Sarasvathy 2001). We have identified two specific cognitive approaches - effectuation logic and bricolage logic - as a perfect combination for appropriate decisional

execution. These approaches embed the capacity to adapt and be flexible, as effectuation logic, and create something new from an environment characterised by scarce resources, as bricolage logic, allowing to protect and sustain corporate growth in volatile contexts (Sarasvathy 2008; Lévi-Strauss 1974).

We believe that the interaction of those two logics, as not exclusive but as better alternatives to the predictive processes – i.e. causation logic - where planning and control are the foundation of decisions and actions, can equip leaders to increase their ability to identify and manage unpredictable events in a turbulent working context.

Our investigation of a different form of the behavioural framework can assist the academic audience and practitioners in gaining more explicit insight into the function of the ability to identify, assess, and potentially respond to geopolitical risks and uncertainties in their multiple dimensions.

Following a stream of academic studies, the literature on decision-making tends to outline two dynamics during the elaboration process of any decision in crisis or uncertainty. The first one, which is based on planning and control and is known by the term causation logic by researchers (Brinckmann, Grichnik and Kapsa 2010; Delmar and Shane 2003; Miller and Cardinal 1994), appears to have limited efficacy for the success of a company in some areas, the second one that we believe is essential to survive in some specific contexts prioritise on a more collaborative, flexible, adaptive, and human-integrated decision-making approach, what academics refer to as bricolage logic (Baker and Nelson 2005) or effectuation logic (Sarasvathy 2001). Our findings reveal that simply implementing planning or control-based approaches (i.e., causation logic) seems to have limited effectiveness for firms in turbulent and unpredictable African business ecosystems, especially in one of the most problematic countries such as Nigeria, where uncertainty or risks can arise from institutional (government and federal entities) or not institutional agents (religious, tribal or terrorist groups or local movements).

According to Alvarez and Parker (2009), Brinckmann et al. (2010), Chwolka and Raith (2012), Dencker et al. (2009), and Gruber (2007), decision-making processes elaborated on local data and past predictions or quantitative detailed plans, frequently based on inaccurate or untrustworthy local elements (incorrect or unreliable local data are common), are no longer effective in confronting the course of events and may even frustrate the aspirations of the

leaders in the application of their decisions. The findings indicate that adaptable, cooperative, and flexible decision-making approaches are essential for addressing geopolitical risks (Han 2018; Sarasvathy 2001). In African contexts, the main features of a decision-making process need to be fast and flexible enough to respond to volatile scenarios. In the absence of these characteristics, the actions and choices of leaders can adversely affect company performance and corporate ability to cope with unexpected events (Dealladio, Caputo and Pellegrini 2023; Zollo et al. 2021). The use of effectuation and bricolage in this research are not exclusive and competing approaches. However, the paper wants to clarify that an elastic approach may facilitate how leaders prepare and make decisions, increasing the understanding of the relationship between decision-making logic and situations of risks or uncertainty. The research identifies that the decision-making process, via the interplays of bricolage and effectuation logics with their flexible and replicable dynamics, better assists a leader's ability to face the multiple challenges of unpredictable events. Furthermore, the study contributes to the existing research on decision-making and political risk by introducing a new perspective that could assist leaders in managing and reacting immediately and effectively to potentially disruptive events in their businesses.

Theoretical background

A strong sense of leadership, which consists of influencing a group of people toward a common objective, is a prerogative necessary to make a business successful (Hung 2015). However, leaders who aspire to this trait continuously must cultivate and refine their skills (Kotter 2011). They have to set clear direction, align people with the entity's requirements that they control and understand in advance business scenarios, providing constant motivation, especially under conditions of risk or uncertainty (Kouzes and Posner 2023; Johnson and Busemeyer 2010). The ability to pursue these results must be supported by an equally efficient decision-making process. In highly uncertain and volatile contexts, such as the one under consideration in this study, traditional management approaches during the decision-making processes, such as data analysis and strategy planning, may be hindered by a lack of reliable, actual and genuine data or information (Alvarez and Barney 2005). In contrast, flexible and collaborative decision-making practices, such as effectuation or bricolage logics, can offer leaders significant advantages (Sarasvathy 2001) in exploring and exploiting existing or future opportunities (Sarasvathy 2001). In this view, effectuation logic involves accepting

uncertainty and utilising existing resources to create favourable outcomes, while bricolage logic focuses on swift adaptation to the innovation and fosters creativity as elements for facing the unexpected circumstances (Sarasvathy and Dew 2005).

Table 1: *The decision-making logics Effectuation, Bricolage vs. Causation*

	The Five ways to differentiate bricolage, effectuation with causation logic		
	BRICOLAGE	**EFFECTUATION**	**CAUSATION**
1	**Making Do**: Creating solutions using the resources immediately available, rather than seeking new or specialized tools	**Bird-in-hand principle:** Start with who you are, what you know, & whom you know	**Approach with pre-set goals:** Start with planning and organising
2	**Resourcefulness**: Use a diverse array of materials and tools at hand, repurposing them in innovative ways to address new challenges	**Affordable loss principle:** Invest only what you can afford to lose	**Highly expected return:** Maximising returns to compensate the risk
3	**Improvisation**: spontaneous and creative problem-solving, allowing for flexibility and adaptability in various situations	**Crazy Quilt principle:** Build a network of self-selected stakeholders	**Competitive business and market analysis:** Detailed data assessment of business

4	**Recombination**: combining existing elements in novel ways to create new meanings or functions	**Lemonade principle:** Embrace and leverage surprises, contingencies, failures	**Avoid uncertainty and risks:** Thinking to minimise the risk associated
5	**Contextual setting**: adjusting to the surrounding environment, allowing to effectively utilise the specific resources and constraints present in their context	**Pilot-in-the-plane principle:** The future comes from what people do	**Follow inevitable trends:** The market elements determine the future

Scholars but also an increasing number of practitioners contend that organisations guided by experienced leaders that modify or adapt their decision-making processes fast in response to the complex environments have exhibited more effectiveness and response than those firms that attempt to anticipate every possible scenario, since it is still impossible to predict the future (Drucker 2005). In particular, the effectuation and bricolage approaches reduce the inter-dependence on predictive models for delivering outcomes, prioritising instead on experimental practices and the strategic utilisation of available (at hand) resources (Baker and Nelson 2005). These behavioural frameworks encourage creative problem-solving and support organisations in seizing emerging opportunities (Senyard et al. 2014).

In line with this theoretical perspective, the study examines the distinctions between causation, effectuation, and bricolage as decision-making frameworks. These approaches prove to be effective in enhancing stakeholder engagement capacity and challenging conventional limitations. The research data posits the implications of implementing effectuation and bricolage logics within volatile management contexts where resources are rare and constrained. It demonstrates their essential utility in recognising geo and political risks by adopting a "make do with what is available" philosophy to uncover new opportunities, leveraging personal networks and

embracing surprises, contingencies, and failures as opportunities. The research seeks to explore how these decision-making logics can be applied in empirical studies, particularly when turbulent or unpredictable environments require flexibility and adaptability. In a nutshell, this paper aspires to argue that in periods of uncertainty, leaders must cultivate the ability to manage risks and navigate unpredictability with personality and creativity, using flexible and adaptive decision-making strategies. Effectuation and bricolage logics, as alternative approaches to causation logic, where data drive the action process, present more viable approaches for organisations that need to adapt and thrive amidst unforeseen challenges. These approaches contrast with the extensive beliefs in which rigid planning and accurate forecasting methods guide successful ventures. Instead, findings and valuable local experience continue to demonstrate that these are not totally adequate for those so volatile ecosystems.

Design/Methodology

The research is a qualitative multi-case study analysing three Nigerian companies located in different geographic areas and with a clear internal hierarchy. The design has been developed, as stated by Creswell, "…. as a method that explores a real-life, contemporary bounded system (a case) or multiple bounded systems (cases) over time, through detailed, in-depth data collection involving multiple sources of information... and reports a case … (or cases) description and case themes" (Creswell 2013), supporting the interpretation of complex and volatile contexts. This method facilitates understanding social, behavioural, cultural or external environmental elements that may influence leaders' decisions during the life of a company in a problematic African environment. In particular, it is believed that when the investigator has modest control over phenomenological events and when the focus is on an existing experience within some real-life context, case studies are valuable elements of understanding related dynamics (Yin 2014). The study uses field interviews as primary data and numerous sources of documents as secondary data to assess how the effectuation and bricolage logics interplays impact the leader's ability to build an effective decision process. This opportunity has also been a valuable option for a macroeconomic picture of Nigeria's business environment and ecosystem. The multi-round interview process has facilitated a comprehensive understanding of the development of effectual and bricolage decision-making logics, as well as the factors that influence or select the choice between them

at any given moment, refining both practical applications and theoretical frameworks. The decision by leaders to adopt an effectual or bricolage decision-making approach represents a deliberate choice to confront uncertainty through adaptable, context-specific responses to local and unpredictable events. As explained by Sarasvathy, this result is achieved by "leveraging existing resources, available means, and stakeholder relationships, which may evolve or assume varying roles over time" (Sarasvathy 2001). This study has recognised this approach as an essential analytical framework for interpreting the stories of corporate leaders and examining their decision-making perspectives. With the use of triangulation with historical archival data, the research provided a robust methodological foundation (Natow 2020). The analysis has focused on the internal and subtle dynamics that play a critical role in defining the attributes of organisations navigating those complex landscapes. The approach also of comparing the business cases has raised the possibility of comparing and contrasting the findings deriving from each of the cases, "both within-case variation over time and cross-case variation", encouraging the authors to consider what is unique and what is shared among the cases, promoting a theoretical reflection from the authors on the perspectives and outcomes received (Gerring 2007). At the same time, archival documents such as academic articles, papers, journals, magazines and books have been collected to enable the triangulation of all the information (Natow 2020; Yin 2009). This methodology has included a longitudinal element, where researchers repeatedly examine the same individuals to detect any changes that might occur over a period of time, with the aim of producing extensive, holistic, and specified clarifications (Piekkari et al. 2009; Pettigrew 1990; Burawoy 1979).

Data collection rationale

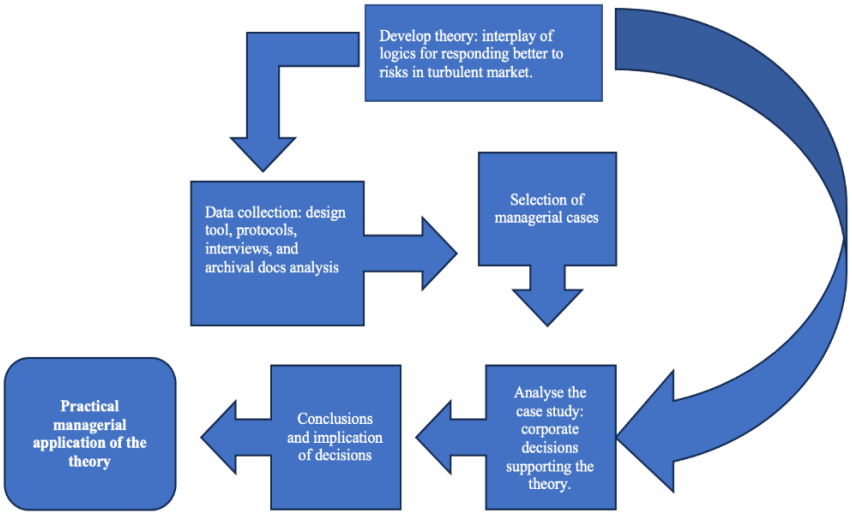
The case studies allowed the authors to “illuminate a decision or set of decisions why they were taken, how they were implemented, and with what result” (Schramm 1971). The research’s concept was to find examples for exploring complex phenomena in depth with limited available data providing practical elements, extending the discussion by selecting case studies that provide opportunities for learning rather than mere data collection. Despite the intrinsic differences among the case studies regarding the business segment (rice, construction and oil distribution) and local corporate dimensions (revenues and employed workforce),

some similarities helped the authors extend the discussion, facilitating the interpretation of information in a more general and comprehensive analysis.

First, the availability of sufficient and immediate access to data was pivotal. In particular, direct access to interview participants, review documents and make field observations has been a fundamental factor in illuminating the responses to the research questions. Second, the cases were all well-suited for addressing “how” and “why” questions, which are central to understanding management practices, as well as decision-making processes, strategic implementation, and leadership outcomes. These “how” and “why” questions are central pins in effectuation logic, demonstrating how those cases embrace and leverage surprises, contingencies, and failures by focusing on simple corporate manageable aspects and adapting the business to emerging situations.

This agility of the involved firms has enabled the evaluation of both effectuation and bricolage principles. This focus has allowed the analysis of flexibility and how leveraging available means can support the response to volatility, demonstrating how the principle of effectuation and bricolage logic, embracing and turning surprises into novel opportunities (lemonade approach) and also embodying improvisation (bricolage approach) by creatively adapting to resource constraints work. Third, all companies have been immersed in their operations, strategy, and business development in one country, Nigeria, since their incorporation, strengthening the acquisition of rich contextual information and typical local behaviours in business. The paper assumes the importance of understanding the broader organisational environment, culture, and external influences in management studies. Lastly, the cases creatively adapted to changing market conditions not only by using whatever resources were immediately available but also by leveraging managerial elasticity, thus representing an additional requirement in exploratory studies like the study of decision-making approaches in management. This adaptability ensured that the research remained responsive to questions and emerging data, thereby enhancing the study’s deepness, rigour, and relevance (Nachmias & Nachmias 2014).

Table 2: *The multi-case study design*



Personal adaptation from R. Yin book, 2017.

Findings

The findings expand the understanding of conditions that foster effectuation and bricolage interplays logics, contributing to the development of strategic decision-making theories in turbulent business contexts. First, they examine contextual factors influencing decision-making processes, showing how leadership expertise addresses challenges (Dew et al. 2009; Sarasvathy 2001; Sarasvathy, 2008) and how, despite local constraints, the hybrid use of effectuation and bricolage logics over time can assist the company profitability. Second, they illustrate how hostile environments and unforeseen events can shape decision-making and why a combination of both logics can help improve leadership effectiveness, especially in those contexts (Zhang et al. 2019; Wiltbank et al. 2009). This non-exclusive ability to adopt combined or alternative logics to the predictive models (i.e., causation logic) by leaders reveals and creates opportunities that are primarily difficult to forecast or implement (Alvarez & Barney 2007). The research recognises those studies suggesting relationships between exploring new opportunities and mutually using effectual and bricolage logics through their simultaneous interaction (Alvarez et al. 2013; Andries et al. 2013). The multiple case studies confirm that coping with uncertainty in Africa increases dependency on these logics, where complex and dynamic contexts require flexible, adaptive, and creative decision-making leveraging contingencies and internal resources (Karami et al. 2022; Sarasvathy 2008). This study notably advances theoretical and practical discussions on how changes in firm management influence

decision-making logic, supporting Alvarez and Barney's (2005) statement that different levels of risk and uncertainty shape decision-making. Specifically, the research highlights the role of leadership during the assessment of risks, uncertainty, resource allocation, and stakeholder influence, setting new insights on the utilization of effectual, bricolage, and causation logics. These context-based conditions posit a non-linear pattern of the efficient decision-making process and reveal how changes can disrupt and reorganize common frameworks, not only influencing future decisions but also providing more precise intuitions into these dynamics that stress the importance of leadership flexibility in managing businesses.

At a macro level, the findings on effectuation and bricolage approaches enhance the understanding of decision-making pre-conditions and consequences in turbulent environments, such as Nigeria. In particular, two novel elements of analysis stand out: the role of stakeholder's network interest and pressure as critical factors influencing leadership decisions and the recognition that fast and coherent modifications in decision-making logics usually positively impact firm performance, enriching theoretical models on effective decision-making in uncertain contexts.

These aspects confirm earlier studies that when the business is under internal or external constraints, leaders cultivate resourcefulness and show a constant search for creative solutions using flexible or adaptive decision-making logics (Baker and Nelson 2005; Mosakowski 2002). Notably, these results contradict the broader observation of some researchers who believe in inflexibility and reduced performance in organizations when encountering resource limitations (De Blick et al. 2024). Therefore, an organisation's competence to tolerate and manage instability, which is very common in Nigeria, is not solely dependent on achieving financial equilibrium. Instead, it lies in its ability to learn from unforeseen events, effectively adapt people and assets to changes and uncertainties, and consistently persist in enhancing the implementation of its daily operations. Enterprises that succeed in such contexts nurture decision-making processes prioritising proactivity over reactivity, fostering a corporate culture of agility and creativity, which serve as essential components for organisational resilience and survival in those areas. Likewise, effective and competent leaders confirm a deep understanding of the local implications regarding inflexibility or a lack of adaptability in their decisional processes or organisational structures when faced with unforeseen circumstances. In this view, these leaders seek to create

methodologies to implement concrete management strategies, providing solutions that enable their organisations to reframe turbulence or risk as opportunities rather than perceiving them solely as threats (Martinez 2019; Meyer 2017).

Originality/Value

The original aspect of the study can be found in its empirical examination of the roles of bricolage and effectuation logics in leaders' decision-making processes and of their subsequent impact on approaches to managing the vast family of political risks. It offers fresh perspectives on decision-making strategies and actions within particular, volatile real-world contexts. It also advances the theoretical debate on political risk's nature and triggers, focusing on practical implications within commercial entities. Furthermore, the research focuses on a profoundly turbulent region, characterised by the Nigerian socio-economic framework, which continually generates unique challenges for the organisation within its boundaries. The paper seeks to clarify, for both academic and practitioner audiences, how Nigeria has evolved into an increasingly erratic and unpredictable business environment in recent decades, making it an attractive theatre for political risk examination. Inconsistent government measures and internal conflicts (ethnic, religious, tribal and terrorist) threaten to suppress investments and business aspirations in this resource-rich but still developing nation presents. In addition, the study offers an examination of how instability worsens firm operational difficulties and how this persistent uncertainty needs innovative and efficient decision-making processes to prosper into the complexities. The results present a contribution to a better conceptual understanding of the importance of adaptation in corporate development, especially when, during the decision-making process, the leaders prefer flexible logic more than planning-based logic.

Through repeated interviews and local empirical evidence, the study indicates that organisations hybrid and creative logics with adaptive strategies for sustained growth in Nigeria's volatile and competitive market. Involving those methodologies, successful firms exhibit a capacity for strategic foresight, cultural sensibility, and a proactive and positive attitude toward risk management (Fergnani 2022; McChrystal and Butrico 2021; Kaplan 2020). Specifically, the application of so-structured decision-making processes may lead to actions that appear illogical or non-standardised with commonly used data or predictive models. This elaboration pushes enterprises to devise a mix of innovative, logical, and practical solutions,

merging effectuation and bricolage logic that, in the long term, reveal their whole effectiveness.

Appendix 1: Interplay of effectuation and bricolage to address typical Nigerian Political Risks

Main P. R. for firms	Description	Addressing with Effectuation	Addressing with Bricolage
Changes in the regulatory environment	Change rules, taxation, environmental regulations, and national law	Leveraging local networks	Innovation, experimentation, improvisation
Extremely Bureaucratic processes	Voluntary alteration of procedures and methodological dynamics	Leveraging contingencies with influential networks	Combining resources and tailoring solutions at hand
Cultural diversity and social norms complexity	Cultural constraints among the population, regions and states	Building flexible relationships Leveraging in-depth understanding of unwritten norms	Contexts adaptability and flexibility for alternative solutions
Corruptions	Bribery and subjective discriminatory taxation	Accepting the inevitable and build resilience with partnerships	Emphasizing resourcefulness over resource acquisition.
Political instability	Political power shift, interstate wars, political and economic sanctions, direct intervention	Surprises are inevitable and can be used to look for new opportunities	Making the most of available resources to cope with uncertainty
Internal or external conflict dangers	Social unrest, violence, migration,	Create solutions with the resources available investing only as much	Emphasizing resourcefulness

	populism, civil wars, coups and revolutions	as you are willing to lose.	over resource acquisition.

Appendix 2: Nigeria business landscape at a glance

Country Features		**Individual Features**		**Business context**	
Population	Large with over 200 million	**Price effect**	low average purchasing power: High price sensitivity of products and services	**Legal and political systems**	Unstable and volatile: combination of Sharia and Common Law
GDP	Relatively modest with fluctuations (2-4% yearly)	**Brand importance**	High: Considered a major vehicle of personal affirmation and social status	**Infrastructure**	Poor and inadequate: collapse of roads and no effective railways
Income	Large and diversified disparity: unequal income distribution	**Age**	Very young: 70% is under 30 and 42% is under the age	**B2B**	Informal and structured around personal and professional relationships

Inflation	High (26%)	**Social norms**	High tribal and religious impact	**B2G**	Strong presence (high political influence on business)
Unemployment rate	High (40%): The North is the part most affected	**Urbanization**	High (Lagos is projected to have 32 million citizens by 2050)	**Expertise**	Relatively Low: staff with little technical knowledge
Social tensions and Politcal Unrest	Very High: poverty and banditry contribute to a turbulent context	**Security**	High rates of violent crimes	**Terrorism**	Strong presence of Boko Haram and islamic terrorist groups in the North

References

Alvarez, S. A., and Busenitz, L.W. (2001). The entrepreneurship of resource-based theory. *Journal of management*, *27*(6), 755-775.

Alvarez, S. A., and Barney, J.B. (2005). How do entrepreneurs organize firms under conditions of uncertainty?. *Journal of management*, *31*(5), 776-793.

Alvarez, S. A., and Parker, S. C. (2009). Emerging firms and the allocation of control rights: A Bayesian approach. *Academy of Management Review*, *34*(2), 209-227.

Baker, T., and Nelson, R. E. (2005). Creating something from nothing: Resource construction through entrepreneurial bricolage. *Administrative science quarterly*, *50*(3), 329-366.

Brinckmann, J., Grichnik, D., and Kapsa, D. (2010). Should entrepreneurs plan or just storm the castle? A meta-analysis on contextual factors impacting the business planning–performance relationship in small firms. *Journal of business Venturing*, *25*(1), 24-40.

Burawoy, M. (1979). The anthropology of industrial work. *Annual review of Anthropology*, *8*(1), 231-266.

Chwolka, A., and Raith, M. G. (2012). The value of business planning before start-up - A decision-theoretical perspective. *Journal of business venturing*, *27*(3), 385-399.

Delladio, S., Caputo, A., Magrini, A., and Pellegrini, M. M. (2023). Italian entrepreneurial decision-making under lockdown: the path to resilience. *Management Decision*, *61*(13), 272-294.

Delmar, F., and Shane, S. (2003). Does business planning facilitate the development of new ventures?. *Strategic management journal*, *24*(12), 1165-1185.

Dencker, J. C., Gruber, M., and Shah, S. K. (2009). Pre-entry knowledge, learning, and the survival of new firms. *Organization Science*, *20*(3), 516-537.

Drucker, P. (2005). The best way to predict the future is to create it.

Fergnani, A. (2022). Corporate foresight: A new frontier for strategy and management. *Academy of Management Perspectives*, *36*(2), 820-844.

Gerring, J. (2007). Is there a (viable) crucial-case method?. *Comparative political studies*, *40*(3), 231-253.

Gruber, M. (2007). Uncovering the value of planning in new venture creation: A process and contingency perspective. *Journal of business venturing*, *22*(6), 782-807.

Han, X., Liu, X., Gao, L., and Ghauri, P. (2018). Chinese multinational enterprises in Europe and Africa: How do they perceive political risk?. *Management International Review*, *58*, 121-146.

Johnson, J. G., and Busemeyer, J. R. (2010). Decision making under risk and uncertainty. *WIREs Cognitive Science*, **1**(5), 736–749.

Kaplan, S. (2020). Why social responsibility produces more resilient organizations. *MIT Sloan Management Review*, *62*(1), 85-90.

Knight, F. H. (1921). *Risk, uncertainty and profit* (Vol. 31). Houghton Mifflin.

Kotter, J. P. (2012). *Leading change*. Harvard business press.

Kouzes, J. M., and Posner, B. Z. (2023). *The leadership challenge workbook*. John Wiley & Sons.

Martínez, M. F., Rojas, J. S., Ruiz, L. M. F., Chipana, H. C., and Fernandez, M. G. M. (2023). Bricolage as a Management Tool: Literature Review. *International Journal of Professional Business Review: Int. J. Prof. Bus. Rev.*, *8*(8), 13.

McChrystal, G. S., and Butrico, A. (2021). *Risk: A user's guide*. Penguin.

McKelvie, A., Haynie, J. M., & Gustavsson, V. (2011). Unpacking the uncertainty construct: Implications for entrepreneurial action. *Journal of business venturing*, *26*(3), 273-292.

Meyer, E. (2014). *The culture map: Breaking through the invisible boundaries of global business*. Public Affairs.

Meyer, E. (2017). Being the boss in Brussels, Boston, and Beijing. *Harvard Business Review*, *95*(4), 70-77.

Miller, C. C., and Cardinal, L. B. (1994). Strategic planning and firm performance: A synthesis of more than two decades of research. *Academy of management journal*, *37*(6), 1649-1665.

Natow, R. S. (2020). The use of triangulation in qualitative studies employing elite interviews. *Qualitative research*, *20*(2), 160-173

Pettigrew, A. M. (1990). Longitudinal field research on change: Theory and practice. *Organization science*, *1*(3), 267-292.

Piekkari, R., Welch, C., and Paavilainen, E. (2009). The case study as disciplinary convention: Evidence from international business journals. *Organizational research methods*, *12*(3), 567-589.

Sarasvathy, S. D. (2001). Causation and effectuation: Toward a theoretical shift from economic inevitability to entrepreneurial contingency. *Academy of management Review*, *26*(2), 243-263.

Sarasvathy, S. D., and Dew, N. (2005). New market creation through transformation. *Journal of evolutionary economics*, *15*, 533-565.

Senyard, J., Baker, T., Steffens, P. and Davidsson, P. (2014). Bricolage as a path to innovativeness for resource constrained new firms. *Journal of Product Innovation Management*, *31*(2), 211-230.

Sutcliffe K.M., Vogus T.J. (2003), Organizing for resilience, in Positive Organizational Scholarship, K. Cameron, J.E. Dutton, R.E. Quinn, Eds. San Francisco: Berrett-Koehler, 2003, pp. 94-110.

Williams, T. A., Gruber, D. A., Sutcliffe, K. M., Shepherd, D. A., and Zhao, E. Y. (2017). Organizational response to adversity: Fusing crisis management and resilience research streams. *Academy of Management Annals*, *11*(2), 733-769.

Yin, R. K. (2014). *Case study research: Design and methods*. Thousand Oaks, CA: Sage Publications.

Yin, R. K. (2009). How to do better case studies. *The SAGE handbook of applied social research methods*, *2*(254-282).

Zollo, L., Rialti, R., Tron, A., and Ciappei, C. (2021). Entrepreneurial passion, orientation and behavior: The moderating role of linear and nonlinear thinking styles. *Management Decision*, *59*(5), 973-994.

How Social Media Influencers and Audiences Co-Create Online Brand Crises

Benjamin Rosenthal

Ana Mott

Introduction

Increasingly, the concept of brand crisis (Hansen et al. 2018) has received attention from marketing research, as consumer impressions of brands' wrongdoings can quickly spread on social media platforms. One example is the #boycottBarilla case, raised from a Barilla's chairman's unfortunate interview (Pace et al. 2017).

While the existing literature on online brand crises analyses brand failure from a product, service, employee and ethical perspective, this study examines an extreme case of moral failure in the advertisement field — the Balenciaga Gift Shop Campaign involving child abuse. This is an extreme case as it involves children's participation in a morally unacceptable context. When such case becomes a topic on social media platforms, social media influencers (SMIs) and audiences discuss and frame it in varied ways, co-creating the brand crisis.

This research's objective is to understand how SMIs and audiences co-create brand crises on social media platforms. Specifically, it adopts a digital methods approach (Rogers 2013) to investigate the types of discourse that SMIs and audiences deployed about the Balenciaga brand crisis on social media platforms, particularly YouTube.

Literature Review

Brand Crisis on Social Media Platforms

Social media platforms amplify brand crises since they allow the (re)production of consumers' opinions and affects about a brand's wrongdoing (Pfeffer et al. 2014; Pace et al. 2017), enlarging the intensity and reach of brand crises. Social media platforms allow consumers to engage with brand events, freely expressing opinions and co-creating brand meanings (Rosenthal and Brito 2017).

Brand crises derive from unexpected negative events that can damage brand value, brand reputation and market performance (Liu et al. 2017; Hansen et al. 2018; Nadeau et al. 2020). Marketing and consumer research offer other similar concepts, such as online firestorms (Scholz and Smith 2019), negative e-WOM (Wetzer, et al. 2007), consumer brand sabotage (CBS), brand cancellation (Bhatia et al. 2023; Demsar et al. 2023), collaborative brand attacks (Rauschnabel et al. 2016) and moral outrage (Lindenmeier et al. 2012). Overall, these concepts highlight how

consumers respond to corporate and brand wrongdoings, challenging brands and corporations and negatively affecting image, reputation and value.

Also, the literature has deepened the knowledge of negative and oppositional forms of online engagement through concepts such as online consumer counterpublics (Rosenthal and Airoldi 2024) and anti-brand communities (Brandão and Popoli 2022).

This article explores the role of SMIs and audiences as co-creators of online brand crises. SMIs are public figures who are particularly effective in engaging and influencing online audiences. Studies have shown the impact of online brand crises upon SMIs when consumers associate them (i.e., through sponsorship) with the targeted brands (Kintu and Ben-Slimane 2020; Singh et al. 2020). Nevertheless, how SMIs affect brand crisis have received less attention in the literature. This study aims to analyze the role of SMIs in the co-creation of meanings within brand crises. Particularly, it explores brand crisis in the context of online publics, as we explain next.

How Brand Crises Constitute Brand Publics

The notion of publics refers to "a mediated association among strangers who are united by an affective intensity that is directed towards a common thing… however momentarily" (Arvidsson and Caliandro 2016, p. 374). Participation in brand publics is not based on social interactions but on the recurrent circulation of discourse (Arvidsson 2013; Arvidsson et al. 2016; Caliandro and Anselmi 2021), that is, individual interactions with "the thing in common that constitutes the public" (Arvidsson and Caliandro 2016, p. 374).

Brand publics (and online publics, more broadly) have an affective nature (Arvidsson 2013; Arvidsson et al. 2016; Papacharissi 2016), with shared affects sustaining collective involvement. Collective involvement in brand publics also involves imitative behaviour, which crates bursts of online behaviour (Arvidsson et al. 2016; Schöps et al. 2024). This is precisely why the notion of brand publics is relevant to understanding the formation of contemporary online brand crises. Brand publics are formed around collective manifestations of opinions and negative affects regarding brands involved in moral wrongdoings.

In this context, SMIs play a key role in shaping public perceptions and co-creating the meanings of brand crises. Research has highlighted how stakeholders (i.e., SMIs and audiences) co-create brand meanings through their objectives and interpretations of brand communication (Rosenthal and Brito 2017). Here, we suggest that SMIs mediate the constitution of brand crises

within brand publics. We also demonstrate how audiences participate in the co-creation process, flaming the brand crisis with negative affects.

Balenciaga: a Brief Background

Balenciaga is part of the French conglomerate Kering which also owns Gucci, Bottega Veneta and Yves Saint Laurent. The house, known for its extravagance in style, texture and ideas, was founded in Spain in 1917 by Cristóbal Balenciaga, known as one of the greatest designers in the history of haute couture. In 2015, Denma Gvasalia was appointed as the brand's creative director. Since then, the brand became widely known for its controversial campaigns, such as IKEA's cheap shopping bag as a luxury product and its highly priced destroyed sneakers. This creative strategy is known as the "inverse of beauty", a symbol of Denma Gvasalia's era. As a consequence, many of its product launches and advertisements became the target of the public in general and also of SMIs who comment on the fashion business on their social media channels.

Creative directors play a key role as business leaders and trend-setters (Parmentier and Fisher 2021). Denma changed the position of Balenciaga in the fashion industry, leveraging extravagance and controversy to make the brand stratospherically popular. Nevertheless, this strategy implies risks of brand crises. On the 21st of November 2022, the Twitter account @shoe0nhead went viral, after criticising the brand: "the brand "Balenciaga" just did a uh….. Interesting… photoshoot for their new products recently which included a very purposely poorly hidden court document about 'virtual child porn'. normal stuff" (@shoe0nhead tweet)

The tweet received numerous replies, retweets and mentions from other users revealing that the brand not only used photos of children with teddy bears with sexual customs and toys but also another advertisement was launched with implicit content of child traffic and pornography (Paton et al. 2022). The event was commented on many social media platforms (i.e., #cancelBalenciaga), turning it into a huge brand crisis.

Indeed, the first campaign (named Balenciaga Gift Shop Campaign) shows images of six children holding teddy bears with sexual customs, BDSM (an acronym for several sexual activities) accessories and wine glasses suggesting alcoholic consumption (see figure 1). The kids present uncomfortable faces and one of them is facing down, which for some suggests dominance and submission. Also, Balenciaga uses its well-known yellow tape with the name of the brand written as "Baalenciaga" which, many claimed, reminds of Baal, a pagan god. There are more critics but given the space limit, we stop here. It is enough to say that the brand seems to have added too

many props in the images of the campaign to spark a huge controversy on social media. If that was the goal (and the authors believe it was), Balenciaga has succeeded. Perhaps too much.

As the brand crisis took over the fashion business and most social media platforms, on November 23, Balenciaga apologized for the incident, removing the campaigns and stating that the company would take proper legal actions against those who had approved the images of the Balenciaga Gift Shop campaign. Balenciaga also posted an apology on Instagram saying that the company takes this matter seriously.

Figure 1 - Image from the Balenciaga Gift Shop Campaign



Methodological Approach

Data Collection

This study adopts a digital methods approach (Caliandro and Gandini 2017; Rogers 2013), which is particularly suitable for investigating discourses about the Balenciaga event on social media platforms. By following the medium (Rogers 2013), we sought the activity of SMIs on Twitter, Instagram, YouTube and TikTok. After a previous analysis, we decided on the adoption of

YouTube, since this platform affords the craft of videos of long duration (e.g. 15 to 20 minutes), the production of elaborated discourses by SMIs and the consumption of this elaborated content by audiences. Furthermore, YouTube is considered the key place to study digital culture and society (Arthurs et al. 2018).

This research also follows the principles of netnographic sensibility which values context-sensitive analysis (Reid and Duffy 2018). We limited the scope of SMIs to Brazilian YouTubers, given the narrow geographical coverage of their audience. The data collection comprises two formats: traditional YouTube videos and "shorts" (which are similar to short TikTok videos). We started by searching for the following keywords:' Balenciaga', 'Balenciaga scandal', 'Balenciaga crisis', 'Balenciaga controversy', 'Balenciaga controversy Brazil' and 'Balenciaga children', all in Portuguese. The search returned a total of 41 videos from 40 SMIs. The videos received 1,377,005 views and 10,622 comments (as of October 13, 2024). While watching the videos and skimming through their comments, a sample of 208 comments was purposefully selected to analyse how the audience reacted to the SMI video. These comments reflected more elaborated expressions about the topic and were legitimated by the audience (i.e., they received many likes from the audience).

Data Analysis

We adopted ethnographic content analysis (Altheide 1987), adapted for social media platforms (Airoldi 2021) for the analysis of visual content (i.e., videos) to describe the discourses about the Balenciaga brand crisis coming from SMIs and audiences. 10 themes emerged through open coding while watching the videos and reading the comments — 'children's rights', 'civic discussions', 'morality', 'law/crime', 'information', 'business', 'fashion', 'history', 'religion 'and 'conspiracy'. For instance, on video 9, a SMI declared that "the impression I have is that protecting children is not an agenda that matters much […] a declared, clear, evidently pedophile propaganda". This comment was coded as 'children's rights', as it adopted a critical perspective toward Balenciaga and a protective perspective towards children. These themes were grouped into three macro themes — advocacy, rational argumentation, and religion and conspiracy theories — which are described in the findings section.

Findings

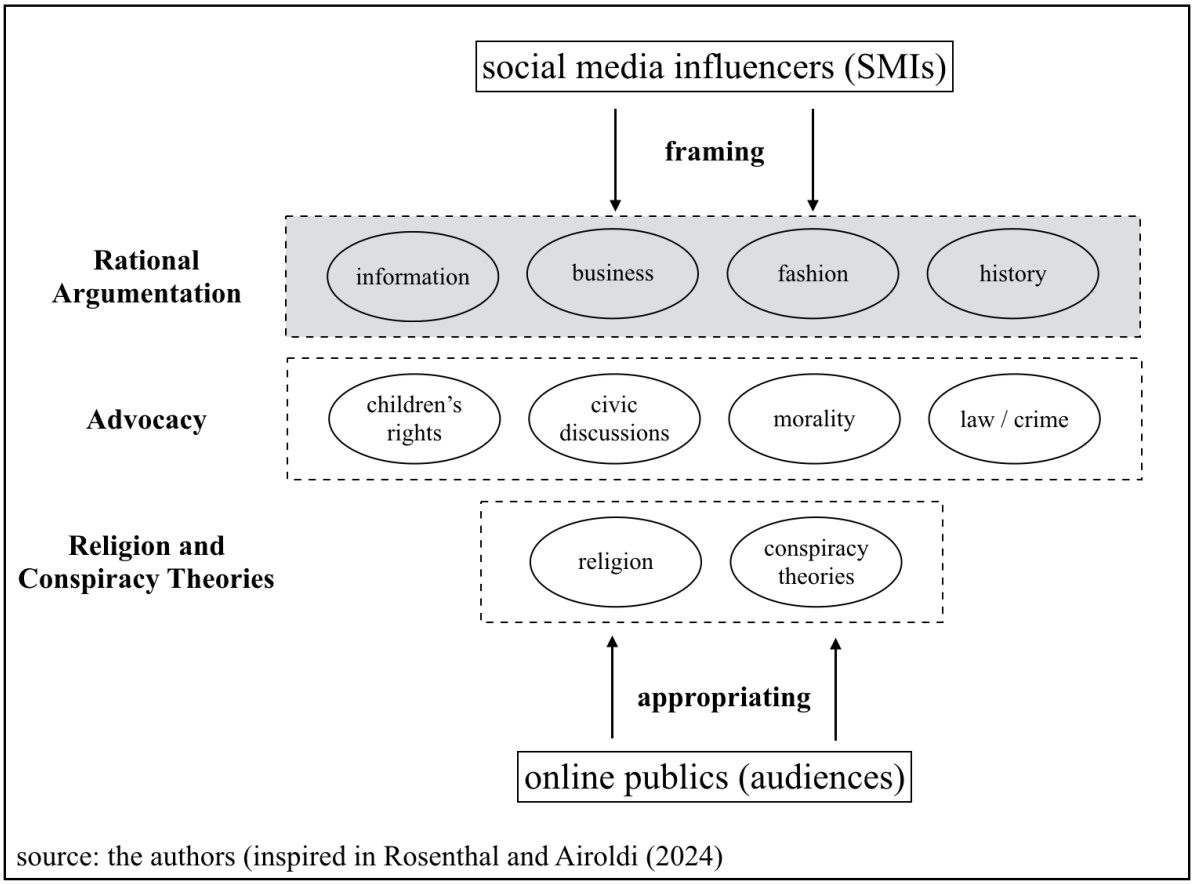
In this section, first, we describe how SMIs frame Balenciaga's moral wrongdoing and fuel Balenciaga's brand crisis through 3 discourses: a) advocacy; b) rational argumentation; and c)

religion and conspiracy theories. Second, we describe how audiences appropriate SMIs' discourses and amplify Balenciaga's brand crisis, accepting some discourses and rejecting others (figure 2).

How SMIs and Audiences Portray the Balenciaga Brand Crisis

SMIs act as catalysts and disseminators of the Balenciaga brand crisis by framing the events in three macro themes, which are described next. Given the space limits, only one type of discourse per macro theme will be described.

Figure 2 - SMIs and Audiences Co-Creating the Balenciaga Brand Crisis



source: the authors (inspired in Rosenthal and Airoldi (2024)

Advocacy was present in 30 out of 41 videos. Advocacy is a macro theme which gathers discourses of four types: 'children's rights', 'civic discussions', 'morality 'and 'law/crime'. We grouped these themes in advocacy since they comprise narratives typical of those who advocate from social perspectives. SMIs discuss the violation of rights within the Balenciaga scandal and they do so through social and political views about the fashion and luxury industries and their moral values. This macro theme reveals discourses which tend to adopt a "good" versus "bad"

narrative in which the “enemies” are Balenciaga’s directors, the photographer of the campaign, other luxury brands and even customers.

In ‘children's rights', SMIs highlight concerns about the use of children in the Gift Shop Campaign, the controversial documents found in the background of the Garde-Robe Campaign, and their links to pedophilia. Many SMIs criticise children's parents, questioning their consent to participate in the campaign. SMIs also expressed outrage for a society in which money and fame overcome ethical behaviour. SMIs also discussed the image of one child facing down, as suggestive of an adult presence, interpreting it as an endorsement of sexual abuse and pedophilia. Furthermore, this theme reveals an emotionally charged tone of voice. Ideas on ‘children's rights ’were often deployed with criticism, sensitivity, discomfort, outrage and strong moral reactions to the campaigns ’perceived messages.

Rational argumentation was found in 33 out of the 41 videos analysed. Rational argumentation is a macro theme which gathers discourses of three types:‘ information’, ‘business’, ‘fashion ’and ‘history’. Rational argumentation marks an interesting twist in the way some SMIs portray the brand crisis. Through rational argumentation, SMIs tend to downplay the moral failure of Balenciaga’s executives. Instead, they “explain” the brand campaign through rational lenses. The discourses within this macro theme turn down the emotional and moral perspective of the crisis. Instead, discourses emphasise the rational actions, the financial motives behind Balenciaga's campaign and even the brand’s inheritance in the fashion world. Interestingly, rational argumentation tends to come first in the videos, as if providing a context for later criticism.

The theme ‘business’, for instance, discusses the brand executives ’motivation and how the scandal impacts the image of the brand. SMIs debate whether brand executives intentionally released the controversial campaign to shock the public and command online attention or whether it was the result of negligence. ‘Business’ involves critics of the advertising industry and its practices of seeking for attention at any cost. ‘Business ’reveals discourses that tend to depart from the moral failure and discuss business matters, such as Balenciaga's official position after the backlash.

Religion and conspiracy theories is present in 19 out of 41 videos. This macro theme gathers two types of discourses: ‘religion ’and ‘conspiracy theories’. It reveals SMIs portraying Balenciaga’s strategy as impregnating the brand identity with ritualistic and satanic codes. It also

emphasises the concept of “anti-fashion”, in which the brand commands extremely high prices for mundane or even absurd items, fooling consumers.

The theme ‘conspiracy theories ’comprises two types of narratives: child abuse and satanism. These narratives are built around items within the images of the campaigns, which SMIs interpret as symbols of BDSM practices and satanic rituals. For instance, SMIs support their interpretation of the intended sexualization of children by suggesting that adults were present on the scene (i.e., in the photos of the Gift Shop Campaign), given the brand’s choice to expose wine glasses, adult-size shoes, bags and sunglasses in the pictures. In ‘conspiracy theories’, the tone of voice is aggressive, suspicious and investigative.

Finally, audiences were highly critical and emotional towards Balenciaga and its executives. Audiences firmly accepted SMIs’ narratives of advocacy and religion and conspiracy. In this way, SMIs catalyse and disseminate discourses about the brand crisis, which are fully received and accepted by online audiences, thus forming a brand public that is sustained by negative affects and ideas regarding the brand crisis. Yet, when SMIs adopt rational argumentation, audiences do not accept it. Instead, audiences flood the comment space of YouTube channels with harsh criticism and attacks on the brand. Thus, although we partially recognise the influential capacity of SMIs to catalyse and disseminate the brand crisis, we suggest that audiences partially support SMIs’ curatorship.

Conclusion

This work reveals how the Balenciaga brand crisis was co-created on YouTube by SMIs and their audiences, forming an oppositional form of brand public which mostly criticises the brand for its behaviour (SMIs and audiences) but also rationally explains it given the luxury field, the logic of the attention economy and Balenciaga’s brand identity. This work contributes to the literature on online brand crisis by revealing the role of SMIs as framing and attributing meanings to Balenciaga’s moral wrongdoing and by highlighting how online audiences follow SMIs only to a certain extent, appropriating some of SMIs’ discourses on the matter but not accepting all of them and also refuting those they disagree with.

References

Airoldi, Massimo (2021), "Digital traces of taste: methodological pathways for consumer research,” Consumption Markets & Culture, 24 (1), 97-117.

Altheide, David L. (1987), "Reflections: Ethnographic Content Analysis," Qualitative Sociology, 10 (1), 65-77.

Arvidsson, Adam (2013), "The Potential of Consumer Publics," ephemera, 13 (2), 367.

Arvidsson, Adam, and Alessandro Caliandro (2016), "Brand Public," Journal of Consumer Research, 42 (5), 727-748.

Arvidsson, Adam, et al (2016), "Crowds and value. Italian directioners on Twitter," Information, Communication & Society, 19 (7), 921-939.

Brandão, Amélia, and Paolo Popoli (2022), ""I'm hatin'it"! Negative consumer–brand relationships in online anti-brand communities," European Journal of Marketing, 56 (2), 622-650.

Caliandro, Alessandro, and Alessandro Gandini (2017), *Qualitative Research in Digital Environments: A Research Toolkit,* Routledge.

Caliandro, Alessandro, and Guido Anselmi (2021), "Affordances-based brand relations: An inquire on memetic brands on Instagram," Social Media+ Society, 7 (2) https://doi.org/10.1177/20563051211021367.

Demsar, Vlad, et al. (2023), "Calling for cancellation: Understanding how markets are shaped to realign with prevailing societal values," Journal of Macromarketing, 43 (3), 322-350.

Hansen, Nele, Ann-Kristin Kupfer, and Thorsten Hennig-Thurau (2018), "Brand crises in the digital age: The short-and long-term effects of social media firestorms on consumers and brands," International Journal of Research in Marketing, 35 (4), 557-574.

Kintu, Belinda, and Karim Ben-Slimane (2020), "Companies responses to scandal backlash caused by social media influencers," International Journal of Market Research, 62 (6), 666-672.

Lindenmeier, Jörg, Christoph Schleer, and Denise Pricl (2012), "Consumer outrage: Emotional reactions to unethical corporate behavior," Journal of Business Research, 65 (9), 1364-1373.

Liu, Yan, Venkatesh Shankar, and Wonjoo Yun (2017), "Crisis management strategies and the long-term effects of product recalls on firm value," Journal of Marketing, 81 (5), 30-48.

Nadeau, John, Richard Rutter, and Fiona Lettice (2020), "Social media responses and brand personality in product and moral harm crises: why waste a good crisis?," Journal of Marketing Management, 36 (11-12), 1031-1054.

Pace, Stefano, Bernardo Balboni, and Giacomo Gistri (2017), "The effects of social media on brand attitude and WOM during a brand crisis: Evidences from the Barilla case," Journal of Marketing Communications, 23 (2), 135-148.

Papacharissi, Zizi (2016), "Affective publics and structures of storytelling: Sentiment, events and mediality," Information, Communication & Society, 19 (3), 307-324.

Parmentier, Marie-Agnès, and Eileen Fischer (2021), "Working it: Managing professional brands in prestigious posts," Journal of Marketing, 85 (2), 110-128.

Paton, Elizabeth., Vanessa Friedman, and Jessica Testa (2022), "When High Fashion and QAnon Collide," The New York Times, available at: https://www.nytimes.com/2022/11/28/style/balenciaga-campaign-controversy.html

Pfeffer, Jürgen, Thomas Zorbach, and Kathleen M. Carley (2014), "Understanding online firestorms: Negative word-of-mouth dynamics in social media networks," Journal of Marketing Communications, 20 (1-2), 117-128.

Rauschnabel, Philipp A., Nadine Kammerlander, and Björn S. Ivens (2016), "Collaborative brand attacks in social media: Exploring the antecedents, characteristics, and consequences of a new form of brand crises," Journal of Marketing Theory and Practice, 24 (4), 381-410.

Reid, Emma, and Katherine Duffy (2018), "A netnographic sensibility: Developing the netnographic/social listening boundaries," Journal of Marketing Management, 34 (3-4]), 263-286.

Rogers, Richard (2013), *Digital Methods*, MIT press.

Rosenthal, Benjamin, and Eliane Pereira Zamith Brito (2017), "The brand meaning co-creation process on Facebook," Marketing Intelligence & Planning 35 (7), 923-936.

Rosenthal, Benjamin, and Massimo Airoldi (2024), "Conceptualising online consumer counterpublics," Journal of Marketing Management, 40 (11-12), 910-936.

Scholz, Joachim, and Andrew N. Smith (2019), "Branding in the age of social media firestorms: How to create brand value by fighting back online," Journal of Marketing Management, 35 (11-12), 1100-1134.

Schöps, Jonathan David, Sarah Schwarz, and Veronika Rojkowski (2024), "Memetic logics of participation: fitness body culture on Instagram," Marketing Theory, 24 (1), 65-89.

Singh, Jaywant, Benedetta Crisafulli, and Melanie Tao Xue (2020), "'To trust or not to trust': The impact of social media influencers on the reputation of corporate brands in crisis," Journal of Business Research, 119, 464-480.

Wetzer, Inge M., Marcel Zeelenberg, and Rik Pieters (2007), ""Never eat in that restaurant, I did!": Exploring why people engage in negative word-of-mouth communication," Psychology & Marketing, 24 (8), 661-680.

How to advance the study of compulsive consumption in macromarketing?

Larissa Becker

Compulsive consumption— "a response to an uncontrollable drive or desire to obtain, use, or experience a feeling, substance, or activity that leads an individual to repetitively engage in a behavior that will ultimately cause harm to the individual and/or to others" (O'Guinn and Faber 1989, p. 148)— is a widespread and impactful phenomenon. Millions of consumers suffer because of the compulsive consumption of alcohol, tobacco, illegal substances, or even activities such as gambling. Compulsive consumption also contributes to societal harms in form of inequalities, violence, traffic accidents, and public expenditures (e.g., World Health Organization 2018). As such, compulsive consumption is an extremely relevant topic that should be addressed from micro and macromarketing perspectives. Since compulsive consumption results from social factors in addition to psychological and physiological ones (Blue et al. 2016), I argue that a macromarketing perspective to the study of compulsive consumption is needed. Hence, the goals of this study are to (a) map previous macromarketing research on compulsive consumption and related concepts and (b) offer a research agenda to macromarketing researchers who want to investigate this topic.

To achieve these goals, I conducted a systematic literature review in the Journal of Macromarketing on compulsive consumption and related concepts. I used selected keywords (e.g., addiction, compulsive, alcohol, gambling) that should be present in the abstract, generating 34 articles. After reading the abstract and, if necessary, skimming the article, I excluded 19 articles that were not about compulsive consumption or a related concept, resulting in 15 articles. To extract data from the articles, I developed a codebook (Booth, Papaioannou, and Sutton 2012).

Preliminary findings indicate that macromarketing studies still largely address the broader category of harmful products/consumption (e.g., Ertz and Le Bouhart 2022; Rittenburg and Parthasarathy 1997), without focusing on compulsive consumption more specifically. Few recent exceptions study compulsive and impulse buying (Nanda, Banerji, and Singh 2023; Olsen, Khoi, and Tuu 2022). Even though studies focus on macro factors that influence levels of harmful consumption (e.g., Solow 2001), studies do not focus on how to reduce compulsive consumption. One exception is Ferguson et al. (2022) who investigate how strategies that seek to denormalize smoking may backfire for young consumers. Moreover, studies tend to focus on a single context, such as alcohol and tobacco. Such gaps provide opportunities for future research. I suggest a

research agenda that integrates macromarketing and other marketing sub-disciplines, more specifically systemic views from service research (e.g., Vargo and Lusch 2016) and Consumer Culture Theory from consumer research (e.g., Arnould and Thompson 2005).

References

Arnould, E. J. and Thompson, C. J. (2005), "Consumer culture theory (CCT): Twenty years of research," Journal of Consumer Research, 31(4), 868-882.

Blue, S., Shove, E., Carmona, C., and Kelly, M. P. (2016), "Theories of practice and public health: Understanding (un)healthy practices," Critical Public Health, 26(1), 36-50.

Booth, A., Papaioannou, D., and Sutton, A. (2012), Systematic approaches to a successful literature review. London: Sage.

Ertz, M. and Le Bouhart, G. (2022), "The other pandemic: A conceptual framework and future research directions of junk food marketing to children and childhood obesity," Journal of Macromarketing, 42(1), 30-50.

Ferguson, S., Brace-Govan, J., Hoek, J., and Mulconroy, M. (2020), "Managing smokefree momentum: Young RYO smokers' responses to tobacco endgame strategies," Journal of Macromarketing, 40(2), 250-265.

Nanda, A. P., Banerji, D., and Singh, N. (2023), "Situational factors of compulsive buying and the well-being outcomes: What we know and what we need to know," Journal of Macromarketing, 43(3), 384-402.

O'Guinn, T. C. and Faber, R. J. (1989), "Compulsive buying: A phenomenological exploration," Journal of Consumer Research, 16, 147-157.

Olsen, S. O., Khoi, N. H., and Tuu, H. H. (2022), "The "well-being" and "ill-being" of online impulsive and compulsive buying on life satisfaction: The role of self-esteem and harmony in life," Journal of Macromarketing, 42(1), 128-145.

Rittenburg, T. L. and Parthasarathy, M. (1997), "Ethical implications of target market selection," Journal of Macromarketing, 17(2), 49-64.

Solow, J. L. (2001), "Exorcising the ghost of cigarette advertising past: Collusion, regulation, and fear advertising," Journal of Macromarketing, 21(2), 135-145.

Vargo, S. L. and Lusch, R. F. (2016), "Institutions and axioms: An extension and update of service-dominant logic," Journal of the Academy of Marketing Science, 44, 5-23.

WHO; World Health Organization (2018), Global status report on alcohol and health. Available in: https://www.who.int/publications/i/item/9789241565639

How to update Aldersonian methodology? Towards a solution to “micro-macro link issue”

Yoji Matsuo

Kazuo Kikuchi

Hanseob Yeo

Abstract

As marketing research evolves, it becomes increasingly specialized, making it harder to grasp the field as a whole. Additionally, It becomes more difficult to engage in discussions with researchers from different areas (e.g., micro/macro, theory/history/case studies, and quantitative/qualitative methods). In such a fragmented situation, researchers are less likely to have opportunities to learn from each other. In other words, it becomes harder to perceive how their own work relates to others, and, ultimately, how it contributes to the discipline.

In this intellectual context, it is crucial to consider the role of macromarketing researchers within the broader marketing discipline. Specifically, with regard to the micro/macro divide, one possible approach is to preserve the uniqueness of macromarketing as a distinct research field, while simultaneously exploring its interactions with micromarketing. This perspective aligns with the working definition of macromarketing proposed by Fisk (1982, p.3).

1. the impact and consequences of micromarketing actions on society (marketing externalities),

2. the impact and consequences of society on marketing systems and actions (social sanctions), and

3. the understanding of marketing systems in their aggregate dimensions (macrosystems analysis).

The uniqueness of the subject addressed by macromarketing is particularly evident in item 3, while the connection between micro and macro research is emphasized in items 1 and 2. Among these, the latter issues represent the most critical research questions. The challenge of explaining the relationship between micro-level actions and macro-level phenomena, often referred to as the “micro-macro link issue,” is widely debated across various social sciences, including economics, sociology, and others.

Although Fisk has brilliantly formulated the micro-macro link as a research topic in macromarketing, no concrete methods for explaining it have yet been proposed. How, then, can this link be explained? In this study, we aim to explore potential approaches for explaining the

micro-macro link by drawing on Alderson's methodology (Alderson 1957) as a starting point for addressing this critical issue. Specifically, we argue that by reevaluating and updating Alderson's methodology from a contemporary perspective, we can develop a more fruitful explanatory framework for macromarketing.

To address this issue, it is essential to identify Alderson's intellectual legacy. First, his most significant contribution lies in demonstrating how "methodology, theory, and practice" in marketing can be developed in a coherent and consistent manner (Matsuo et al. 2024). Alderson was a renowned business consultant as well as a prominent researcher. In seeking a theory that would be useful for his daily consulting services, he found that ecological explanations based on functionalism (Part I of Alderson 1957) were effective in explaining the behavior of firms. By relying on this methodology, he developed a marketing theory (Parts II and III of Alderson 1957) that focuses on how firms should adapt to the business environment in order to survive. Thus, Alderson proposed a marketing theory and practice grounded in ecological functionalism.

Second, although incomplete, Alderson's methodology addresses the link between micromarketing and macromarketing. Here, "methodology" refers to the meta-discussions involved in theory construction. As previously mentioned, Alderson adopted ecological functionalism to explain how firms adapt to their environment. We refer to this mode of explanation as MoE 1. On the other hand, Alderson recognized a different mode of explanation (MoE 2), which describes the evolution of market transactions (e.g., mass advertising, credit sales, and retail self-service) and market organizations (e.g., consignment selling, wholesalers without stocks, brokers, and commission merchants) as the results of firms' adaptive behavior. In short, MoE 2 is "the mode of explanation for institutional dynamics."

Alderson (1957) introduces these modes of explanation, yet the connection between them is seldom discussed. How are they related? This question is not particularly difficult to answer. Unlike in Alderson's time, contemporary social sciences frequently engage with this issue, often referring to it as the "micro-macro link issue." It is therefore possible to update Alderson's argument from a contemporary perspective. In sociology, the relationship between micro-level actions and macro-level social phenomena is often conceptualized as self-referential processes. Social rules and conventions regulate human behavior, thereby ensuring social stability. However, these rules are not immutable. Deviations can occur, and through diffusion, they may eventually lead to changes in the rules themselves. In other words, society maintains

stability and generates patterned actions, while remaining open to transformation, with its structure being continuously reproduced over time.

If Alderson's modes of explanation can be updated to reflect this cyclical process in marketing phenomena, the connection between them becomes clearer and more seamlessly integrated into a unified explanatory framework. Moreover, this framework has the potential to effectively explain the core concerns of macromarketing, as identified by Fisk. Specifically, MoE 1 explains the downward arrow (Fisk's item 2), illustrating how micro-level actions are taken (or should be taken) under a macro-level environment. In contrast, MoE 2 explains the upward arrow (Fisk's item 1), describing how micro-level actions influence the macro-level environment.

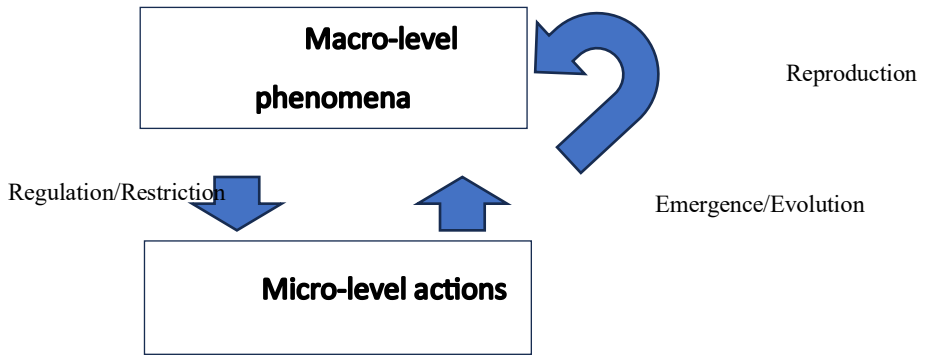


Fig.1 Two modes of explanation and micro-macro link

Finally, the methodology primarily referenced in updating Alderson's methodology is Joseph Agassi's discussion of "institutional individualism" (Agassi 1960). Updating Alderson's methodology from Agassi's perspective provides a valuable framework for explaining macromarketing. Furthermore, if the theory of the micro-macro link is constructed based on the methodology of institutional individualism, it could not only enhance our understanding of Fisk's item 3, but also contribute to the development and selection of macro-level measurement scales grounded in this theoretical foundation.

References

Agassi, Joseph (1960), "Methodological Individualism," *The British Journal of Sociology*, 11(3), 244-70.

Alderson, Wroe (1957), *Marketing Behavior and Executive Action*. Homewood, IL: Richard D. Irwin.

Fisk, George (1982), "Editor's Working Definition of Macromarketing," *Journal of Macromarketing*, 2(1), 3-4.

Matsuo, Yukio, Kazuo Kikuchi, and Hyeongwoo Yeo (2024), "Towards the Advancement of Theoretical Research in Marketing: Focusing on the Interpretation Issue to Alderson (1957)," research report, Marketing History Society of Japan (November 30).

Infoproducts: Beware of the Scam!

Livia Rizzuto Gallo

Benjamin Rosenthal

Marketing and consumer research often portray influencer marketing in positive ways, highlighting how consumers foster parasocial relationships with social media influencers, how social media influencers command attention, convey authenticity and credibility and positively affect brand metrics, consumer behaviour and social norms (Vrontis et al. 2021).

Recently, marketing and consumer researchers have started to dedicate attention to the dark sides of social media influencers (Leban 2022; Barari 2023; Ekinci, Dam and Buckle 2025; Hudders and Lou 2023). For instance, Ekinci et al. (2025) presents the complexities of harms within influencer culture, including harmful products, misinformation, unrealistic beauty standards, comparison culture, deceptive consumption, and privacy concerns. This work takes a similar venue and investigates scamming cultures within social media influencers.

Scams are endemic in markets (Faxon and Wittekind 2023) and are thriving where institutional norms have eroded and technology facilitated the creation of hype and the communication of shiny opportunities promoting and promising enrichment, life improvement and self-transformation (Birla 2015; Faxon and Wittekind 2023; Verhulst et al. 2024). Technological advancement, in particular, seems to facilitate the work of scammers, as exemplified by the rise of the Nigerian Prince scams (Brody et al. 2022). In this working paper we investigate another type of potential scam: the rising phenomena of infoproducts.

Infoproducts are content-based digital products sold and distributed through the internet, involving, for instance, ebooks, audiobooks, video lessons, screencasts, podcasts, membership programs and any other form of knowledge- and skills-based digital products (Pedro 2022). Infoproducts are often simple and engaging in its form and easy to consume since buyers can see it or listen to it whenever they want, e.g., while commuting, exercising or lunching (Pedro 2022). Infoproducts are also simple to produce and have scalability, which allows creators and distributors to increase profits given their communication and selling kills and online audience size. Given these qualities it is not surprising that info products became a relevant source of income for social media influencers who leverage on their online audiences to sell infoproducts. Yet, although infoproducts are a substantive business topic, there is a lack of academic studies investigating them.

This work adopts digital methods (Rogers 2013) to investigate how infoproducts are promoted by social media influencers and how social media influencers attempt to attract potential buyers. Furthermore, we want to investigate potential scamming qualities within the promotion of infoproducts by social media influencers. For that, we selected 17 social media influencers who communicated their participation in the Hotmart Galaxy event, which is organised by Hotmart to award the 25 largest creators of infoproducts in its platform. Hotmart promotes its business as the worlds' largest platform of digital products. While navigating this list, Instagram suggested other influencers with the same profile. By following this suggestion, we extended the list to 65 influencers. We classified them by the type of product they promote; 31 influencers teach "how to sell in the internet", 10 influencers teach about "personal development" and 10 influencers teach about mental health. The others teach about a myriad of topics, such as public speaking and personal branding. We decided to focus on influencers selling infoproducts of the 3 main topics. Data collection comprises 10 posts and one week of stories of each influencer (Bainotti et al. 2021). Data analysis involved critical visual analysis (Miotto et al. 2021; Barros et al. 2025).

Our findings illuminate different types of communication strategies, describe how social media influencers leverage on qualities of their personal brand to convey credibility, promote optimistic new futures and aggressive personal transformation for potential buyers. We also highlight potential scamming risks involved on infoproducts and suggest strategies for consumer awareness of such risks.

References

Bainotti, Lucia, Alessandro Caliandro, and Alessandro Gandini (2021), "From archive cultures to ephemeral content, and back: Studying Instagram Stories with digital methods," *New Media & Society,* 23 (12), 3656-3676.

Barari, Mojtaba (2023), "Unveiling the dark side of influencer marketing: how social media influencers (human vs virtual) diminish followers 'well-being," *Marketing Intelligence & Planning,* 41 (8), 1162-1177.

Barros, Amon, et al. (2025), "'Brazil must be a country for entrepreneurs and workers, not scoundrels': Personal branding mechanisms underpinning CEO activism," *Human Relations,* 78 (1), 32-58.

Birla, Ritu (2015), “Speculation illicit and complicit: contract, uncertainty, and governmentality,” *Comparative Studies of South Asia, Africa and the Middle East,* 35 (3), 392-407.

Brody, Richard G., Sara Kern, and Kehinde Ogunade (2022), "An insider's look at the rise of Nigerian 419 scams,” *Journal of Financial Crime,* 29 (1), 202-214.

Engel, Elena, et al. (2024), "Social media influencers and adolescents ’health: A scoping review of the research field,” *Social Science & Medicine,* 340, 116387.

Ekinci, Yuksel, Shubhankar Dam, and Georgia Buckle (2025), "The Dark Side of Social Media Influencers: A Research Agenda for Analysing Deceptive Practices and Regulatory Challenges,” *Psychology & Marketing*, 1-14.

Faxon, Hilary Oliva, and Courtney T. Wittekind. "Livestreamed land: Scams and certainty in Myanmar’s digital land market." Environment and Planning D: Society and Space 42.4 (2024): 512-533.

Hudders, Liselot, and Chen Lou (2023), "The rosy world of influencer marketing? Its bright and dark sides, and future research recommendations,” *International Journal of Advertising*, 42 (1), 151-161.

Leban, Marina (2022), "Unethical behaviour of social media influencers: history, practice and future research,” *The SAGE Handbook of Social Media Marketing*. SAGE Publications Ltd, 456-469.

Pedro, João (2022), “8 Types of Digital Products You Can Create,” Hotmart, available at: <https://hotmart.com/en/blog/types-of-digital-products>

Verhulst, Bert, et al. (2024), ““Unlock a better life: Here's how!": A critical inquiry into how life coaches gain capital and shape legitimacy using Instagram's affordances,” *First Monday*.

Viotto, Marina Henriques, Maria Carolina Zanette, and Eliane Pereira Zamith Brito (2021), "Looking good or feeling good? The dual role of the body in the taste transformation process,” *Consumption Markets & Culture,* 24 (1), 54-74.

Vrontis, Demetris, et al. (2021), "Social media influencer marketing: A systematic review, integrative framework and future research agenda,” *International Journal of Consumer Studies,* 45 (4), 617-644.

Information asymmetry in the healthcare sector – Assessing its harmful effects and exploring potential strategies for mitigation

Regina Alvarado Mujica

Frédéric Jallat

Abstract

This paper examines the historical and contemporary manifestations of information asymmetry in healthcare, exploring its consequences and proposing actionable solutions.

Information asymmetry, or the imbalance of knowledge between parties in a transaction, is a well-recognized issue in healthcare, often impacting patient outcomes, treatment decisions, and industry accountability.

By investigating historical cases of ethical failure and analyzing current challenges such as misinformation, biased research, and health literacy gaps, the study demonstrates how information asymmetry exacerbates inequities in healthcare.

The paper argues that while perfect information symmetry is unattainable, fostering informational justice and trust is essential for a more equitable and effective healthcare system.

Through a structured approach combining literature review, expert interviews, and field observations, the research aims to gain an in-depth understanding of how information asymmetry affects the healthcare ecosystem, identify its primary sources, and explore potential strategies for mitigation, focusing on educational reform, technological innovations, and trust-building mechanisms.

Keywords

Healthcare, information asymmetry, informational justice, patient-centricity, health education, artificial intelligence

Introduction

Healthcare is fundamentally an information-driven field, as it is built upon an array of symptoms, treatments, molecules and illnesses, which in turn affect every single healthcare decision being made. Much like other information-rich environments, the information in healthcare is derived from a multitude of sources.

Asymmetric information, which refers to a situation where one party in a transaction possesses greater material knowledge than the other party (Bloomenthal, 2024) is not only normal in healthcare but expected. Patients have more information on their medical histories

and symptoms. Doctors understand the illnesses and the courses of treatment better, and pharmaceutical companies possess the often-secret information regarding research, clinical trials and side effects.

Nevertheless, while information asymmetry is contemplated and accepted within the healthcare industry, there are instances where these information failures lead to overall market failures, defined as instances when the market does not deliver transactions that make all parties better off (Gruber, 2020) which in turn, may result in irrelevant, ineffective, insufficient and even unsafe treatment for patients.

Medical information asymmetry throughout history – past and present

Throughout history, there has been many instances where information asymmetry within healthcare has resulted in ethical missteps and the endangerment, and even death, of the most vulnerable population.

Six historical examples (e.g., Thalidomide scandal, Tuskegee syphilis study) have been chosen that accurately illustrate the phenomenon and emphasize systemic failures.

These six examples represent a utilitarian approach to healthcare decision-making, where the focus is on advancing scientific discoveries, improving the health of the general population as a whole, and in some cases, prioritizing certain groups over others.

This framework often comes at the expense of individual patients. While utilitarianism can be an effective model for certain aspects of healthcare, such as public health initiatives and epidemic responses, it is not without significant ethical risks. It is a slippery slope, as the pursuit of societal advancement may be achieved through unethical means, including deception, coercion, and manipulation (Santa Clara University, 2014).

The world has immensely changed since the days of Tuskegee and Thalidomide, many governing bodies such as the United States' Office of Human Research Protections were created, as well as numerous regulations such as the Nuremberg code and the World's Medical Association (WMA) Declaration of Helsinki were put into place to preside over power imbalances in medicine (most specifically in clinical research involving humans), while also reducing the existing information failures.

Nonetheless, although evolved and demurer than before, information asymmetry is still very present within the healthcare industry and examples abound of multiple biases, failure to

listen, information overload, high motivations for profit, low health literacy which explain that patients receive inappropriate or insufficient treatment often having to endure painful and debilitating side effects, get misdiagnosed or not actually treated for the correct diagnosis. The direct repercussion of this is a loss of trust between the patients and the healthcare industry in general. If healthcare is trust, then trust is broken.

Eroded trust in healthcare

Healthcare is a very unique market, as patients are the ultimate users of its goods and services, yet they are not the main drivers of the decisions regarding their own health. Patients must rely on experts to decide what is best for them with often little to no knowledge to advocate otherwise.

Traditionally, it has been well accepted that patients trust the knowledge and judgement of their healthcare professionals. This trust is one of the fundamental bases of health, yet lately this trust has been waning (Rasiah et al., 2020).

The consequences of this loss of trust are profound. Care outcomes, particularly in the treatment of chronic illnesses, are adversely affected as patients may delay or avoid seeking medical attention. This mistrust also discourages the proactive use of preventive measures and mental health services.

According to the World Economic Forum, poor communication and the spread of misinformation are largely explained by mistrust (Kluge et al., 2023), while another study conducted by St. George's University School of Medicine discovered that some of the main reasons that patients do not trust their doctors is because doctors don't spend enough time with patients, know them properly or listen to them (Wolters, 2023).

In the case of patients trusting pharmaceutical companies, the loss in trust has decreased by an even steeper gradient as patients perceive these companies as profit seeking and solipsistic. This in turn, has its own set of consequences such as low adherence to treatment, low participation in clinical trials and the rejection of effective health interventions including vaccination campaigns (Singh et al., 2023).

Health misinformation is also very likely to arise with new diseases such as Covid-19 or Monkey pox, as there is no solidified and confirmed scientific information while scientists try to come up with answers. In the early days if Covid-19, the Malaria treatment *Hydroxychloroquine* was tested as a possible treatment for the novel pandemic, yet it gained popularity on social

media before it was debunked as ineffective and dangerous. It is estimated that around 17,000 people died from the incorrect, and often self-medicated, use of Hydroxychloroquine during the Covid-19 pandemic (Abrams, 2024). While misinformation can lead to patients self-medicating, it can also lead to patients refusing some medicines as well. Following the Covid-19 example, a survey conducted by the CCDH found that individuals who relied on social media as their source of medical information are significantly more hesitant about getting the vaccine. As of 2020, 31 million people followed anti-vaccine groups on Facebook while 17 million followed similar accounts on YouTube (Burki, 2020).

Some of the inaccurate conceptions about the Covid-19 vaccine that were shared through social media were that vaccines are linked to autism, that vaccines lead to infertility, that the government was injecting microchips through the vaccine to more closely surveil the population, or simply that the vaccine does not work to treat the disease (Wang, 2024).

To recapitulate, as health misinformation spreads, health illiteracy aggravates and so does the gap of information asymmetry between doctors, pharmaceutical companies and patients. Patients may die because of incorrect or lack of treatment which in turn, can further fuel the misinformation being spread online.

Informational justice and education as drivers for a healthier healthcare ecosystem

One thing is certain: without trust in the healthcare system and its stakeholders, people will remain vulnerable to misinformation, and patients will continue to endure unnecessary suffering. Building and maintaining trust is essential for ensuring that accurate information is shared, preventive care is utilized, and treatment outcomes are optimized.

The information treated within the industry requires a high level of education, preparation and study. The problem of the healthcare industry today is not the existence of information asymmetry, rather the extent to which this presents itself and the consequences it brings, mainly to patients. Henceforth, the solution to information asymmetry is not information symmetry as this is utopic, but instead a fair and comfortable level of information across all parties, so they can contribute to the decision-making process, which will make drug development, diagnosis, treatment, and adherence as effective as possible.

Informational justice which is defined as the delivery of information with sufficient explanation and authenticity, focuses on how well explanations are delivered in the decision-making process, as these can have a potentially significant impact (Khurshid, 2023).

Informational justice is already widely used across the healthcare industry in order to reinstate trust and mitigate information failure.

Pharmaceutical companies need to know how patients are truly feeling and reacting when taking a drug in a clinical trial in order to develop the best medicine possible. Doctors need to understand how drug X was developed, why it is better than drug Y and what they need to expect when prescribing it to patients. On the other hand, they also need to understand the patient's illness, comprised of an exhaustive list of their symptoms, their medical history and lifestyle habits. Finally, patients who thus far have been the biggest victims of information injustice, need to understand what their diagnosis is and what it entails, what their treatment will be and why the decision was taken to follow that specific route, the importance of following the treatment and the consequences of not doing so.

Informational justice can be seen as the essential foundation that ensures each party within the healthcare ecosystem is equipped with the necessary information to actively participate in decision-making. This principle hinges on effective communication and transparency, fostering an environment where trust is cultivated, and all stakeholders benefit. Ultimately, achieving informational justice not only improves the healthcare system's functionality but also leads to better health outcomes for patients.

Reframing information asymmetry requires that healthcare transition from an adversarial model of information withholding to one of collaborative transparency.

Informational justice—providing all parties with sufficient, clear, and actionable information—should be a guiding principle organized along four main line of actions:

- *Leveraging feedback loops*

Tools like Real World Evidence studies (RWE) and advisory board meetings enable iterative improvements in care delivery. Scaling these practices could foster a culture of continuous learning and adaptation.

- *Embracing patient-centric models*

Patient-centered care shifts the decision-making power balance, integrating patients' lived experiences and preferences into treatment plans. This approach has demonstrated improvements in adherence, satisfaction, and outcomes.

- *Addressing structural barriers*

Overcoming systemic issues like racial and gender biases in diagnostics and treatment requires both regulatory interventions and shifts in medical education and practice.

Technology, particularly artificial intelligence (AI), offers promising solutions by enhancing access to reliable health information, aiding in symptom analysis, and supporting diagnostic processes.

- *Formalizing health education*

As part of a global curricula, starting from early education, a foundation for greater health literacy can be built among future generations. Helping a culture of curiosity, altruism, transparency, patience, and most importantly trust within the healthcare industry may ensure that information flows freely and more equitably.

Complementing these cultural shifts, omnichannel public health campaigns can disseminate critical information effectively, ensuring it reaches diverse populations. By addressing these cultural and systemic gaps, adverse effects of information asymmetry could be mitigated in order to prioritize human well-being over market inefficiencies.

Conclusion

Our research methodology, which integrates a literature review, case studies, professional insights, and public perspectives and opinions, enabled a comprehensive exploration of health information asymmetry within the healthcare industry. By blending academic research with field observations and stakeholder interviews, we aimed to capture a holistic picture of how information asymmetry manifests across the healthcare continuum and how it can subsequently be mitigated.

Our multi-pronged approach has laid a strong foundation for understanding the nuanced role of information in shaping health outcomes and identifying potential strategies to improve transparency, accountability, and equity in healthcare communications.

Healthcare’s complexity and sensitivity make information asymmetry an inherent challenge, but not an insurmountable one. By prioritizing trust, education, and collaboration, stakeholders can mitigate the consequences of this imbalance.

Historical and contemporary examples illustrate the critical need for equitable information sharing, supported by technological innovations and patient empowerment.

Different solutions currently put in place to breach the information gap, such as consumer-driven healthcare and a deeper focus on health literacy, informational justice and trust for

patients, as well as the technological advances, such as artificial intelligence may prove to be useful in the near future to mitigate this market failure.

While complete information symmetry remains utopian, striving for informational justice—where every stakeholder has sufficient knowledge to make informed decisions—is both a moral and practical imperative.

As healthcare systems evolve, the pursuit of this balance will not only improve outcomes but also restore trust, ensuring a healthier, more equitable future for all.

References

Bloomenthal A (2024). Asymmetric Information in Economics Explained [Internet]. Investopedia. [cited 2024 Aug 10]. Available from: https://www.investopedia.com/terms/a/asymmetricinformation.asp

Gruber J. 24. Market Failures II: Informational Asymmetry [Internet]. www.youtube.com.2020 [cited 2024 Aug 5]. Available from: https://www.youtube.com/watch?v=hm5zqBPsRJM

Santa Clara University. Calculating Consequences: the Utilitarian Approach to Ethics [Internet]. Markkula Center for Applied Ethics. Santa Clara University; 2014 [cited 2025 Sep 15]. Available from: https://www.scu.edu/ethics/ethics-resources/ethical-decision-making/calculating-consequences-the-utilitarian-approach/

Rasiah S, Jaafar S, Yusof S, Ponnudurai G, Chung KPY, Amirthalingam SD. A Study of the Nature and Level of Trust between Patients and Healthcare Providers, Its Dimensions and Determinants: a Scoping Review Protocol. BMJ Open [Internet]. 2020 Jan [cited 2024 Sep 26];10(1). Available from: https://bmjopen.bmj.com/content/10/1/e028061

Kluge H, Sikkut R. Why is trust in healthcare waning and what can be done? [Internet]. World Economic Forum. 2023 [cited 2024 Sep 26]. Available from: https://www.weforum.org/agenda/2023/12/why-is-trust-in-healthcare-waning-and-what-can-be-done-about-it/

Wolters Kluwer. The importance of building trust in the physician-patient relationship [Internet]. www.wolterskluwer.com. 2023 [cited 2024 Sep 26]. Available from: https://www.wolterskluwer.com/en/expert-insights/the-importance-of-building-trust-in-the-physician-patient-relationship

Singh Y, Eisenberg MD, Sood N. Factors Associated With Public Trust in Pharmaceutical

Manufacturers. JAMA Network Open [Internet]. 2023 Mar 14 [cited 2024 Sep 26];6(3):e233002. Available from: https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10015300/#:~:text=Of%202874%20individuals%2C%20167%20(6,reported%20always%20trusting%20pharmaceutical%20manufacturers.

Abrams Z. How to reverse the alarming trend of health misinformation [Internet]. Apa.org.2024 [cited 2024 Oct 1]. Availablefrom:https://www.apa.org/monitor/2024/07/ending-health-misinformation

Burki T. The online anti-vaccine movement in the age of COVID-19. The Lancet Digital Health [Internet]. 2020 Oct 1 [cited 2024 Oct 1];2(10):504–5. Available from: https://www.thelancet.com/journals/landig/article/PIIS2589-7500(20)30227-2/fulltext

Wang M. POV: Health Misinformation Is Rampant on Social Media [Internet]. Boston University. 2024 [cited 2024 Oct 1]. Available from: https://www.bu.edu/articles/2024/health-misinformation-rampant-on-social-media/

Khurshid R, Hussain S, Ahmad M. Impact of the Informational Justice & Interpersonal Justice on Organization Commitment. Research Journal for Societal Issues. 2023 Sep 30, 5(3):181–9.

Investigating Take-Up Discrepancy in the Healthy Start Scheme: A Machine Learning Approach

Kuzivakwashe Makokoro

John Harvey

Gavin Long

Andrew Smith

Simon Wellham

Evgeniya Lukinova

Roberto Mansilla

James Goulding

Introduction

England's food insecurity rate is rising, with around 11% of the UK population experiencing food poverty between 2022/3 (Francis-Devine, Malik and Roberts 2024). Healthy Start Scheme (HSS) is one of the UK government's schemes established to address food insecurity. This scheme is means-tested and supports low-income families with children under 4 with a subsidy to purchase fruits, vegetables and milk. The scheme's uptake, however, has failed to reach all eligible people. Whilst the Healthy Start Scheme promotes fruit and vegetable consumption, evidence around this is conflicting (Moonan et al. 2022; Ohly et al. 2017; Scantlebury et al. 2018).

Theoretical background and research context

The average uptake of the scheme is 64%, falling short of its 75% target (Hansard Parliament 2005), despite being highly valued by families who report that it makes a tangible difference (Barrett, Spires and Vogel 2024). Stigma, administrative burden, benefit level and information cost are cited as key themes explaining low uptake(Browne, Dundas and Wight 2016; Lucas et al. 2015). The traditional model used to explain the non-take-up of benefits, the 'rational trade-off model', assumes that individuals are rational decision makers (Janssens and Van Mechelen 2022). Recent advancements in behavioural economics and macromarketing theory suggest that decision-making regarding public benefits is more nuanced than that. Janssens and Van Mechelen's (2022) multilevel framework broadens the rational trade-off theory by adding cultural, social, psychological and systematic barriers that affect uptake. From a macromarketing perspective, the framework aligns with the focus on systemic and cultural issues that affect access to public provisions.

This study examines take-up discrepancy rates for the Healthy Start Scheme in England. The take-up discrepancy rate refers to the rate per 1000, of beneficiaries not signed up to the scheme. This study aims to predict areas with high discrepancy using proxies of food insecurity (e.g. Nica-Avram et al. 2021), to identify determinants of non-take-up.

The study focuses on answering the following questions:

1) Can deprivation and food insecurity measures predict the take-up discrepancy rate of the Healthy Start Scheme at a local authority level in England?

2) What are the most important metrics that can be used to predict the Healthy Start Scheme take-up discrepancy rate in England?

Method

For our primary research question, we used a range of regression-based machine learning models to evaluate and predict the outcomes. Specifically, we used Linear regression, ridge regression and ensemble methods such as random forest and decision tree regression models. The prediction models considered are commonly used models for prediction in policy (Callaway and Tong 2023), and food insecurity (Amin et al. 2021). We conducted Shapley value analysis (SHAP) to determine the relative importance of variables within our model. SHAP provides a measure of feature importance by calculating each variable's (metric) contribution whilst accounting for feature interactions. The take-up discrepancy rate was measured as:

*Take-up discrepancy rate = (Eligible beneficiaries - Entitled beneficiaries)/population *1000)*

The rate provides a population-normalised measure that highlights areas with disproportionate high non-participation relative to their population size. Given the number of England local authorities (305) and variables (78), we employed a correlation matrix to reduce the number of variables in the model. The features after the matrix included UK-based retailer shopping data from 'The Cooperative Group' (e.g. spending patterns on soft drinks and alcohol, and temporal patterns such as night shopping), Office of National Statistics deprivation datasets (e.g. income deprivation, fuel poverty, and multi-dimensional household deprivation), neighbourhood characteristics (e.g. lone parent households, unemployment, English language proficiency, takeaway sandwiches shops, ethnic diversity and childhood obesity), and NHS Healthy Start Scheme uptake data for England. These features were utilised as dimensions of food

insecurity (Nica-Avram et al. 2021), proxies of structural and cultural context (Saatcioglu and Corus 2014) and broader networks (Renton Hooper and Renton 2024).

Results & Discussion

The Ridge regression model outperformed other models with an R-squared value of 0.861 and a low mean squared error (MMSE) of 0.172, which indicates the model's predictions are generally close to the observed values. Despite the Ridge regression model performing better than other models, the Random Forest and Linear regression models should also be considered as they were only marginally outperformed by the Ridge models. These results suggest that food insecurity proxies alongside socio-economic variables are good predictors of discrepancies.

The SHAP analysis revealed higher predicted take-up discrepancies in areas with more single-parent households with young children, reception obesity, or high unemployment, despite these groups' likely eligibility. This suggests systemic and cultural barriers compound vulnerabilities, aligning with intersectionality theory (Saatcioglu and Corus 2014). Lucas et al. (2015) found recipients feared losing benefits from minor income increases. The fluctuating nature of food insecurity means eligibility can change as people transition between security and insecurity phases (Moraes et al. 2021). These findings support the multi-level framework that policy design and administrative complexity can discourage participation.

Recent statistics from England reveal 9.6% obesity at 4-5 years, increasing to 22.1% by age 11 (Stiebahl 2025) with stark socioeconomic disparities (The Food Foundation 2023). Our study found that areas with higher reception (4-5 years) obesity are associated with higher predicted take-up discrepancies. Given that the scheme is associated with increases in health-positive eating habits (Scantlebury et al. 2018), this finding requires further investigation. The findings underscore the need to view welfare programs as part of broader provisioning systems that address long-term health and social disparities (Renton, Hooper and Renton 2024).

The study also reveals that the areas with a high percentage of non-English speakers are associated with high take-up discrepancies, while areas with a high percentage of ethnic minorities showed the opposite effect. This suggests that language barriers play a significant role in preventing families from engaging with the scheme which is consistent with previous research (McFadden et al. 2014). This finding highlights the importance of community-centred approaches (Renton, Hooper and Renton 2024) and targeted marketing to address individual eligible beneficiaries' needs, ensuring information reaches those at most risk.

Implications

The results highlight the importance of addressing systemic barriers that prevent vulnerable populations from accessing the scheme. Policymakers should address the intersection of financial, social, health and psychological barriers to participation. This can include, improving accessibility to non-English speakers, outreach to single-parent households and reducing stigma through target public relations campaigns.

Conclusion

This study extends rational trade-off models by using machine learning to identify key predictors of the Healthy Start Scheme take-up discrepancy rates across England. Our findings reveal that socioeconomic factors, particularly lone-parent households, unemployment and reception obesity are strong predictors of discrepancies. Through a macromarketing lens, we demonstrate how systemic barriers can create inequitable access and we recommend community-based outreach, utilising social networks, and administrative simplifications. This multi-level approach to addressing low uptake contributes to more effective social provisioning systems for vulnerable families.

References

Amin, Modhurima Dey., Syed Badruddoza., and Jill J. McCluskey (2021), "Predicting Access to Healthful Food Retailers with Machine Learning," Food Policy, 99, 101985.

Barrett, Miranda., Spires, Mark., and Vogel, Christina (2024), "The Healthy Start Scheme in England 'Is a Lifeline for Families but Many Are Missing Out': A Rapid Qualitative Analysis," BMC Medicine, 22(1), 177-184.

Stiebahl, Sonja (2025) “Obesity statistics,” research report. House of Commons Library (February 10)

Browne, Susan, Dundas, Ruth, and Wight, Danny (2016), "Assessment of the Healthy Start Voucher Scheme: A Qualitative Study of the Perspectives of Low Income Mothers," The Lancet, 388, S12

Callaway, Brantly and Tong, Li (2023), "Policy Evaluation During a Pandemic," Journal of Econometrics, 236(1), 105454.

Cetateanu, Andreea and Jones, Andy (2014), "Understanding the Relationship Between Food Environments, Deprivation and Childhood Overweight and Obesity: Evidence from a Cross Sectional England-Wide Study," Health & Place, 27, 68-76.

Chouvatut, Varin and Wattanapairotrat Supawit (2019), "Feature Reduction from Correlation Matrix for Classification of Two Basil Species in Common Genus," In 2019 16th International Joint Conference on Computer Science and Software Engineering, (JCSSE), PP375-380.IEE

Collin, Daniel F., Guan, Alice., and Hamad, Rita (2023), "Predictors of WIC Uptake Among Low-Income Pregnant Individuals: A Longitudinal Nationwide Analysis," The American Journal of Clinical Nutrition,117(6),1331-1341.

Defeyter, Margaret A., Hetherington, Marion., McKean, Mike and Forsey, Andrew (2022), "The Bungled Digitisation of Healthy Start Is Hampering Low Income Families' Access to Healthy Food'," BMJ, 377

Francis-Devine, Brigid., Malik, Xameerah., and Roberts, Nery (2024) "Food poverty: Households, food banks and free school meals," research report. House of Commons Library (September 2)

Geiger, Jennifer R., Wilks, Scott E, and Livermore, Morgan M (2014), "Predicting SNAP Participation in Older Adults: Do Age Categorizations Matter?" Educational Gerontology, 40(12), 932-946.

Griffith, Rachel., von Hinke, Stephanie and Smith, Sarah (2018), "Getting a Healthy Start: The Effectiveness of Targeted Benefits for Improving Dietary Choices," Journal of Health Economics, 58, 176-187.

Hansard Parliament. (2023) "Cost of Living: Healthy Start Scheme - Hansard - UK Parliament," debate presented in Parliament, London, UK (May 23)

Janssens, Julie and Van Mechelen, Natascha (2022), "To Take or Not to Take? An Overview of the Factors Contributing to the Non-Take-Up of Public Provisions," European Journal of Social Security, 24(2), 95-116.

Wonsik, Ko and Moffit, Robert A (2024), "Take-up of Social Benefits," in Handbook of Labor, Human Resources and Population Economics, Klaus F. Zimmermann, ed. Cham: Springer, 1-42.

Kuhle, Stefan., Brown, Mary Margaret and Stanojevic , Sanja (2023), "Building a Better Model: Abandon Kitchen Sink Regression," Archives of Disease in Childhood: Fetal and Neonatal Edition 109(6), 574-579.

Lucas, Patricia J., Jessiman, Tricia and Cameron, Ailsa (2015), "Healthy Start: The Use of Welfare Food Vouchers by Low-Income Parents in England," Social Policy and Society, 14(3), 457-469.

McFadden, Alison, Green, Josephine., Williams, Victoria., McLeish, Jenny., McCormick, Felicia., Fox-Rushby, Julia, and Renfrew, Mary J (2014), "Can Food Vouchers Improve Nutrition and Reduce Health Inequalities in Low-Income Mothers and Young Children: A Multi-Method Evaluation of the Experiences of Beneficiaries and Practitioners of the Healthy Start Programme in England," BMC Public Health, 14, 1-13.

Moonan, May., Maudsley, Gillian., Hanratty, Barbara and Whitehead, Margaret (2022), "An Exploration of the Statutory Healthy Start Vitamin Supplementation Scheme in North West England," BMC Public Health, 22(1), 392.

Moraes, Caroline, McEachern, Morven G., McEachern, Gibbons, Andrea and Scullion, Lisa (2021), "Understanding Lived Experiences of Food Insecurity through a paraliminality Lens," Sociology, 55(6), 1169-1190.

NHS Business Authority (2023), “What you'll get and how to shop – Get help to buy food and milk (Healthy Start),” https://www.healthystart.nhs.uk/what-youll-get-and-how-to-shop/

NHS Business Services Authority (2023). “FOI-01337 - Datasets - Open Data Portal BETA,” https://opendata.nhsbsa.net/dataset/foi-01337

NHS (2024), “Healthcare professionals – Get help to buy food and milk (Healthy Start),” https://www.healthystart.nhs.uk/healthcare-professionals/

Nica-Avram, Georgiana., Harvey, John., Smith, Gavin., Smith, Andrew and Goulding, James (2021), "Identifying Food Insecurity in Food Sharing Networks via Machine Learning," Journal of Business Research, 131, 469-484.

Nohara, Yasunobu., Matsumoto, Koutarou., Soejima, Hidehisa and Nakashima, Naoki (2022), "Explanation of Machine Learning Models Using Shapley Additive Explanation and Application for Real Data in Hospital," Computer Methods and Programs in Biomedicine, 214, 106584.

Office for Health Improvement and Disparities. (2023) “National Child Measurement Programme Operational Guidance 2023,”research report. Office for Health Improvement and Disparities (October 1).

Ohly, Heather., Crossland, Nicola., Dykes, Fiona., Lowe, Nicola and Hall-Moran, Victoria (2017), "A Realist Review to Explore How Low-Income Pregnant Women Use Food Vouchers from the UK's Healthy Start Programme," BMJ Open, 7(4), e013731.

Purdam, Kingsley, Garratt, Elisabeth A and Esmail, Aneez (2016) "Hungry? Food insecurity, social stigma and embarrassment in the UK," Sociology, 50 (6),1072-1088.

Rains, Tim and Longley, Paul (2021), "The Provenance of Loyalty Card Data for Urban and Retail Analytics," Journal of Retailing and Consumer Services, 63, 102650.

Renton, Michelle, Hooper, Val and Renton, Andrew (2024), “Extending Layton's Marketing Systems for Future Transformation-Deepening Connections Between Marketing and Provisioning Systems: A Case-Based Approach.” Journal of Macromarketing, 44(2), 441-452.

Saatcioglu, Bige, and Corus, Canan (2014), “Poverty and intersectionality: A multidimensional look into the lives of the impoverished.” Journal of Macromarketing, 34(2), 122-132.

Scantlebury, Rachel J., Moody, Alison., Oyebode, Oyinlola and Mindell, Jennifer S. (2018), "Has the UK Healthy Start Voucher Scheme Been Associated with an Increased Fruit and Vegetable Intake Among Target Families? Analysis of Health Survey for England Data, 2001-2014," Journal of Epidemiology and Community Health, 72(7), 623-629.

Scikit Learn. (2023). GridSearchCV — scikit-learn 1.5.0 documentation. https://scikit-learn.org/stable/modules/generated/sklearn.model_selection.GridSearchCV.html

Scikit Learn. (2023). SimpleImputer — scikit-learn 1.5.0 documentation. https://scikit-learn.org/stable/modules/generated/sklearn.impute.SimpleImputer.html

The Food Foundation (2023) “The broken plate 2023: The state of the nation’s food system,” research report. The Food Foundation (June 27).

Losing Confidence in Global Supply Chains: The Exploitation of Tariffs in a New Era of Isolationism

Omar J. Khan

Central to effective global marketing among multinational enterprises (MNEs) is the reliance on predictable and cost-efficient supply chains. Members across such chains exist across national boundaries. With the rise of reactionary governments (primarily right-wing) coming to power across the world over the last two decades, there has been an attendant, and somewhat surprising, propensity towards protectionism and the use of tariffs as a favored device towards its achievement – most notably, and very recently, by the implementation of vast, somewhat haphazard tariff regimes by the United States.

The present study is an exploratory, conceptual paper which examines the usage (or, rather, weaponization) of tariff regimes in the Americas (along with selected, comparative examples from other parts of the world) over the last two decades. Through this examination, we attempt to understand realignment of MNEs' global supply chains in reaction to protectionist-induced disruption. As an exploratory piece, we attempt to isolate critical themes in this examination, yielding a conceptual framework – which may be useful for more detailed future confirmatory studies. This exploratory understanding, we believe, will be useful given the contradictory rationales of economic disruption in the current geo-political environment. For multinational corporations, the key marketing system bearing the brunt of economic disruption caused by the weaponization of tariffs is global supply chains, and we utilize the observation of supply chain disruptions and realignments to inform our exploratory framework. The contribution of such a conceptual framework is to help make sense of seemingly contradictory strategies in wielding country-level trade policy and investment strategies.

For example, the afore-mentioned right-wing governments show isolationist tendencies. However, such governments, including the current one in the United States, tend to be – at least, prima facie – friendly towards MNEs and generally averse to regulations. It would, thus, be instructive to see actual effects of supply chain disruption created by tariff actions seemingly contradictory to anti-regulatory fervor of right-wing governments. Existing theory from market failures literature and transaction cost economics (TCE) literature would suggest that such effects would be primarily negative for countries initiating such tariff actions, but there has also been some support (albeit, limited) for protectionist tendencies in certain cases even among academia.

The activist perspective towards Megamarketing (Kotler 1986) lends itself well to helping create sense-making out of the new-found affinity for chaos in the political economies of current right-wing government – most notably, the United States.

In particular, the paper seeks to establish critical frameworks and cost/benefit imperatives that drive viewpoints of right-wing policy makers. The paper is, therefore, a conceptual analysis that is exploratory in nature. We believe such understanding is necessary to adequately challenge and actively resist the overreach of more extreme right-wing (and often-authoritarian) governments in the modern world. The benefit of this research for Macromarketers is two-pronged: 1) understanding impact on global supply chains by recent right-wing inspired tariff "weaponization" and 2) understanding what such right-wing governments expect to gain from such actions. For informing our understanding of present-day marketing systems and our own academic micromarketing activism, we believe such analyses are vital.

References

Kotler, Philip (1986), "Megamarketing," Harvard Business Review, 64, 117-124.

Low-Resource Entrepreneurship and Global Competition Asymmetry: A Theoretical Reflection on the Effects of the Mercosur-European Union Agreement on the Dynamics of Subsistence Markets in South America from a Post-Abyssal Analysis

Camila Braga Soares Pinto

Thiago Gomes de Almeida

Tatiana Dornelas de Oliveira Mendes

Cristina Sayuri Cortes Ouchi Dusi

Giovani Peterson Alves Mendes

Giovana Pedrette

Victoria Santos

Luiza Crispin Murta

The burgeoning academic interest in examining markets as a comprehensive unit of analysis, transcending the traditional dyadic producer-consumer relationship, has significantly contributed to reinforcing the perspective of market system dynamics (Pedeliento et al. 2023). This analytical framework elucidates the roles and practices of various actors in the construction and evolution of markets (Araujo 2007, Araujo et al. 2010, Kjellberg and Murto 2021). By broadening the understanding of market system dynamics, researchers can analyze not only individual markets in isolation but also their interactions with other market formations.

It is within this conceptual framework that the present study is situated, examining the recent bilateral trade agreement between Mercosur and the European Union, signed in December 2024, as a catalyst for change across multiple dimensions of the Brazilian context, particularly affecting subsistence and low-resource enterprises (Sridharan, Maltz and Gupta 2014). The agreement encompasses provisions related to trade promotion and the empowerment of women, alongside opportunities for small producers, cooperatives, indigenous peoples, and local communities (Brazil 2024).

Leveraging the potential of post-abyssal thinking, particularly through the *sociological logic of emergencies* (Santos 2009) and studies addressing tensions related to *subalternization* (Spivak 2010, Das Neves and Almeida 2015, Chedid and Hemais 2022), this theoretical reflection aims to pave the way for future empirical research. Such studies will focus on theoretical contributions that can inform public policies designed to mediate the impacts of the Mercosur-European Union agreement.

In the contemporary competitive landscape of innovation, Peters (1986) underscores that public policies are governmental actions that influence and shape the lives of citizens. In Brazil, there are multiple agencies offering incentives, including funding institutions and support foundations, which through their programs, allocate resources to companies, universities, and independent inventors. These resources are distributed via scholarships, grants, subsidies, and equity participation, among others, as outlined in Law No. 13.243, dated January 11, 2016 (Brazil 2016).

This innovation-driven environment, shaped by public policy agendas (Steiner et al. 2008), tends to foster, on one hand, an international context characterized by increasing protectionism and commercial unilateralism, while on the other, it creates opportunities for heightened competitiveness through negotiations between economic blocs. In a system anchored in competition, the quest to capture new markets and consumers hinges on reducing production costs. Consequently, it becomes imperative to leverage cutting-edge technology to attain hyper-productivity levels—manufacturing more in less time (Justen et al. 2017) and operating on a global scale to capitalize on opportunities as they emerge, transcending the confines of local cultures (Ger 1999). The perception of innovation in the canon is governed by neoliberal principles aimed at maximizing economic gains.

In this highly competitive landscape, it is essential to consider the recent agreement between Mercosur and the European Union, signed in December 2024 (Brazil 2024, Brito and Alves 2025), which represents the culmination of negotiations spanning 25 years. The agreement includes tax reductions on exports and imports, directly influencing Brazil's economic indicators by boosting exports and reducing inflation rates. Furthermore, it incorporates tariff eliminations for the automotive sector and policies designed to promote sustainable development (Brazil 2024).

If, on one hand, this new scenario benefits sectors such as consumer goods, particularly those involving quintessential Brazilian products, it concurrently intensifies competition within Brazilian borders. European-origin goods, despite their higher production costs, become more competitive due to factors such as specialized labor and external variables like exchange rate fluctuations, which may sometimes be favorable or unfavorable to business.

The challenge of this scenario arises from the manner in which markets are structured (Jaworski and Kohli 2017) and how such policies are enacted, which largely depend on macro-

level demographic and geographic factors, as well as meso- and micro-level considerations, including socio-historical contexts and local social realities. In this context, the predominance of neoliberal and protectionist economic-political orientations is reinforced, favoring groups with substantial resources and territories originating from the Global North (Santos 2009). These actors can more swiftly attain competitive advantages (Porter 1982, Carpenter and Nakamoto 1989, Day and Moorman 2013, Jaworski et al. 2000) by either exploiting large-scale manufacturing capabilities or pursuing differentiation through the procurement of superior raw materials and the development of technologically advanced processes. Conversely, this scenario engenders various negative effects, impacting how market actors become vulnerable (Cova et al. 2021) across social, cultural, and economic dimensions. This particularly affects small entrepreneurs with the potential to transform their environment (Maximiano 2010, Audy 2017), as they find themselves asymmetrically situated in a competitive landscape that rapidly moves from local to global dimensions.

Although the agreement explicitly allows for the continuation of policies supporting micro and small enterprises (Brazil 2024), the anticipated influx of foreign products into Brazil will compel small entrepreneurs to demonstrate their market competitiveness and the distinctiveness of their offerings. They will need to pursue international certifications, access support and training programs, understand economic indicators such as exchange rates, indices, taxes, and fees, and also develop proficiency in foreign languages (Brito and Alves 2025).

In the Global North, producers advance in competition with their expanded educational and professional repertoires. However, in the Global South, entrepreneurs rely on different literacy foundations and require support to cultivate skills beyond the artisanal craftsmanship necessary for creating and producing typical products. They must rapidly acquire comprehensive knowledge of management and economics, which can pose significant challenges in understanding and structuring business arrangements and commercial operations—particularly when export opportunities arise.

This phenomenon of vulnerability and competitive asymmetry aligns with the theoretical framework of *abyssal thinking*, connected to the Epistemologies of the Global South (Santos 2009). It represents a system of visible and invisible distinctions that separate two realms of cognitive and social realities. These distinctions extend beyond geographical boundaries, encompassing epistemological knowledge sources, political domination, and various forms of

oppression rooted in colonial and patriarchal systems. According to Santos (2009), this separation also manifests from a macro-political perspective, where the state's role as a regulator of social rights—balancing economic advancement—and as a provider of resources is systematically undermined, shifting these responsibilities to private servitization.

These and other structural measures impede the co-presence of both sides of the abyssal line—what this study conceptualizes as the competitive co-presence of large Nordic-origin corporate groups (visible) and small entrepreneurs from the Global South (invisible). This dynamic exposes economic, market-driven, ethical, ethnic, civilizational, and psychosocial dimensions (Sawaia 2007), all of which are influenced by the coloniality of power (Quijano 1991, 2000, 2009). Coloniality enforces a classification and hierarchical ordering of the world's population based on racial/ethnic criteria as a structural mechanism of power and domination, thereby disrupting systemic competitive balance.

For example, when considering the restriction of "access [of these entrepreneurs] to public services and facilities, material and immaterial assets, and opportunities that enable life reproduction at a dignified level" (Rebehy et al. 2005, p. 51), it becomes evident that this environment leads to cultural depletion and the erosion of plurality and diversity (Fanon 1965), even within products and services. This fosters the proliferation of monopolistic knowledge, homogenization, the delegitimization of the "other," and the occurrence of constraints or injustices in global market competition (Dussel 1996, Han 2019, Maciel and Fischer 2020, Ferreira and Hemais 2023).

However, in the context of low-resource entrepreneurship, increasing awareness of these entrepreneurs' subalternity (Das Neves and Almeida 2015) and the silencing of their voices, particularly those of women (Spivak 2010), as well as acknowledging the competitive asymmetry and challenges in "overcoming" the presence of foreign competitors (Han 2019), can catalyze initiatives that challenge abyssal thinking through a sociological logic of emergencies (Santos 2009). In alignment with this post-abyssal approach, this study seeks to integrate such epistemologies with entrepreneurship theories and market system formation (Martin and Schouten 2014, Fajardo et al. 2019). It emphasizes the formation of constellations of businesses with homologous or peer profiles, which collaboratively shape the market and support one another in addressing emerging tensions related to subalternization (Chedid and Hemais 2022).

This approach promotes knowledge exchange and facilitates the integration of newly established enterprises (Maciel and Fischer 2020).

Recent developments in international trade and geopolitical debates—such as those initiated by the current U.S. president, Donald Trump, concerning the taxation of products and the establishment of trade barriers in exchanges with other countries (G1 2025) — underscore the importance of studies focused on market dynamics and their effects, particularly in contexts of social inequality. Given this scenario, there are opportunities for new research analyzing the relationship between global and local markets and low-resource entrepreneurship.

Thus, this theoretical essay aims to pave the way for a reflective and post-abyssal investigation into the effects of the Mercosur-European Union agreement on subsistence and low-resource entrepreneurial markets. The objective is to establish a foundation for future empirical studies that can monitor the evolution and developments of the agreement over time.

This topic is considered relevant from a theoretical perspective as it contributes to advancing knowledge on market construction and shaping approaches within a globalized context. From an empirical standpoint, it also holds significance by providing insights for public policies that support positive outcomes for vulnerable entrepreneurs impacted by the agreement while helping to mitigate conditions of subalternity, precariousness, asymmetry, and injustice.

References

Araujo, L. (2007), "Markets, market-making and marketing." Marketing theory, 7(3), 211-226.

Araujo, L., Finch, J., and Kjellberg, H. (2010), "Reconnecting marketing to markets." Oxford University Press.

Audy, J. (2017), "A inovação, o desenvolvimento e o papel da universidade." [*Innovation, development and the role of universities]* Estudos avançados, 31, 75-87.

Brasil. (2016), "Lei nº 13.243, de 11 de janeiro de 2016. Dispõe sobre estímulos ao desenvolvimento científico, à pesquisa, à capacitação científica e tecnológica e à inovação." *[Law No. 13.243, of January 11, 2016. Provides incentives for scientific development, research, scientific and technological training and innovation.]* Brasília, DF: Presidência da República. Disponível em: http://www.planalto.gov.br/ccivil_03/_ato2015-2018/2016/lei/l13243.htm. Acesso em: 30 ago. 2021.

Brasil. (2024), "Acordos Comerciais Mercosul-União Europeia." *[Mercosur-European Union Trade Agreements.]* Disponível em: https://www.gov.br/siscomex/pt-br/acordos-

comerciais/acordos-comerciais/mercosul-uniao-europeia. Acesso em: 10 de fevereiro de 2025.

Brito, C., and Alves, V. (2025), "4 temas econômicos que vão impactar empreendedores em 2025." *[4 economic issues that will impact entrepreneurs in 2025.]* *Pequenas Empresas e Grandes Negócios*, Globo Editora. Disponível em: https://revistapegn.globo.com/economia/noticia/2025/01/4-temas-economicos-que-vao-impactar-empreendedores-em-2025.ghtml. Acesso em: 13/01/2025.

Carpenter, G. S., and Nakamoto, K. (1989), "Consumer preference formation and pioneering advantage." Journal of Marketing research, 26(3), 285-298.

Chedid, Y. D. A., and Hemais, M. W. (2022), "Subalternização de mulheres brasileiras em contextos de turismo: uma análise pós-colonial com base em Spivak."*[Subalternization of Brazilian women in tourism contexts: a postcolonial analysis based on Spivak]* Revista Brasileira de Pesquisa em Turismo, 16, e-2357.

Cova, B., Ivens, B. S., and Spencer, R. (2021), "The ins and outs of market shaping: Exclusion as a dark side?" Journal of Business Research, 124, 483-493.

Dantas, F. C. (2020), "OPTIMUS: metodologia de gestão da inovação para instituições científicas e tecnológicas públicas." *[OPTIMUS: innovation management methodology for public scientific and technological institutions]* Dissertação (Mestrado Profissional em Ciência, Tecnologia e Inovação) - Escola de Ciências e Tecnologia, Universidade Federal do Rio Grande do Norte, Natal.

Das Neves, C. R., and Almeida, A. C. (2015), "O papel da mulher intelectual na libertação da subalternidade de gênero no mundo pós-colonial." *[The role of intellectual women in the liberation of gender subalternity in the post-colonial world.]* Em Tempo De Histórias, (25). https://doi.org/10.26512/emtempos.v0i25.14813

Day, G., and Moorman, C. (2013), "Regaining customer relevance: The outside-in turnaround." Strategy and Leadership, 41(4), 17-23.

Dussel, E. (1996), "Filosofía de la Liberación." *[Liberation Philosophy]* Bogotá: Editorial Nueva América. Disponível em: http://biblioteca.clacso.edu.ar/clacso/otros/20120227024607/filosofia.pdf.

Fajardo, A. B., Shultz, C., and Joya, J. C. M. (2019), "Entrepreneurship as boundary object: Toward reintegration of Colombia's ex-militants into civil society." Journal of Macromarketing, 39(4), 368-384.

Fanon, F. (1965), "Os condenados da terra." *[The damned of the earth.]* Lisboa, Portugal: Editora Ulisseia.

Ferreira, M. de S., and Hemais, M. W. (2023), "Horizontes de decolonização em marketing: uma proposta com base na crítica à colonialidade da teoria da globalização de mercados." *[Horizons of decolonization in marketing: a proposal based on the critique of the coloniality of the theory of market globalization]* Cadernos EBAPE. BR, 21(2), e2022-0134.

G1. (2025), "Trump promete tarifar de novo o aço: o que atingiria Brasil." *[Trump promises to re-tariff steel: which would hit Brazil.]* Disponível em: https://g1.globo.com/economia/noticia/2025/02/09/trump-promete-tarifar-de-novo-o-aco-o-que-atingiria-brasil-o-que-se-sabe.ghtml. Acesso em: 10 de fevereiro de 2025.

Ger, G. (1999), "Localizing in the global village: Local firms competing in global markets." California Management Review, 41(4), 64-83.

Han, B. C. (2019), "Hiperculturalidade: Cultura e globalização." *[Hyperculturalism: Culture and globalization.]* Petrópolis, RJ: Vozes.

Jaworski, B., Kohli, A. K., and Sahay, A. (2000), "Market-driven versus driving markets." Journal of the academy of marketing science, 28(1), 45-54.

Jaworski, B. J., and Kohli, A. K. (2017), "Conducting field-based, discovery-oriented research: Lessons from our market orientation research experience." AMS Review, 7(1/2), 4-12.

Justen, A., Gurgel, C. R. M., da Silva Ferraz, D. L., and Cunha, E. P. (2017), "Administração política: por uma agenda de pesquisa marxista." *[Political administration: towards a Marxist research agenda.]* Farol–Revista de Estudos Organizacionais e Sociedade.

Kjellberg, H., and Murto, R. (2021), "Theorizing markets." AMS Review, 11(3), 207-215.

Maciel, A. F., and Fischer, E. (2020), "Collaborative market driving: How peer firms can develop markets through collective action." Journal of Marketing, 84(5), 41-59.

Martin, D. M., and Schouten, J. W. (2014), "Consumption-driven market emergence." Journal of Consumer research, 40(5), 855-870.

Maximiliano, A. C. A. (2010), "Administração para empreendedores" *[Management for entrepreneurs]* (2. ed.). São Paulo: Pearson.

Pedeliento, G., Mangiò, F., Murtas, G., and Andreini, D. (2023), "Market system dynamics (MSD): A process-oriented review of the literature." AMS Review, 13(3), 173-195.

Peters, B. G. (1986), "American Public Policy." Chatham, N.J.: Chatham House.

Porter, M. E. (1982), "Competitive strategy." RAE-Revista de Administração de Empresas, 22(2), 44-46.

Quijano, A. (2000), "Colonialidad del poder y clasificación social."*[Coloniality of power and social classification]* Journal of World-Systems Research, 6(2), 342-386.

Quijano, A. (2009), "Colonialidade do Poder e Classificação Social." *[Coloniality of Power and Social Classification.]* In B. S. Santos and M. P. Meneses (Orgs.), "Epistemologias do Sul" (pp. 103-119). Coimbra: CES.

Rebehy, P. C. P. W., Belissimo, D. Y., Sandrin, S. G., Fiorati, R. C., and Carretta, R. Y. D. (2015), "Co-Labora Incubadora de Empreendimentos Solidários: Experiência de Economia Solidária em Projetos de Extensão Universitária em Ribeirão Preto." *[Co-Labora Incubadora de Empreendimentos Solidários: Experience of Solidarity Economy in University Extension Projects in Ribeirão Preto.]* Revista de Cultura e Extensão USP, 12, 37-55.

Santos, B. S., and Meneses, M. P. (2009), "Epistemologias do Sul." *[Epistemologies of the South.]* Coimbra: Edições Almedina.

Sawaia, B. (2007), "As artimanhas da exclusão: análise psicossocial e ética da desigualdade social." *[The tricks of exclusion: a psychosocial and ethical analysis of social inequality]* Petrópolis: Vozes.

Singer, P. (2002), "Introdução à Economia Solidária."*[Introduction to Solidarity Economy]* São Paulo: Fundação Perseu Abramo.

Spivak, G. (2010), "Pode o subalterno falar?" *[Can the subordinate speak?]* Editora UFMG.

Sridharan, S., Maltz, E., Viswanathan, M., and Gupta, S. (2014), "Transformative subsistence entrepreneurship: a study in India." Journal of Macromarketing, 34(4), 486-504.

Steiner, J. E., Cassim, M. B., and Robazzi, A. C. (2008), "Parques tecnológicos: ambientes de inovação." *[Technology parks: innovation environments]* Revista IEA. USP, São Paulo.

Macromarketing Of Services For Family Caregivers

Mark Peterson

Jeff Wang

Rather than healing chronic illnesses, modern medical interventions often offer a longer decline for patients to live out their lives at home. Unfortunately, the families of the chronically ill currently receive scant attention from actors in the healthcare system. This research discusses the gap in our healthcare system (between medical institutions (hospitals/clinics) and family institutions (located in homes). The principal question of the study focuses on whether better world (macromarketing-inspired) marketing of services could bridge this gap between medical institutions and families. Such services could include registering the lead caregiver as a patient of the hospital clinic along with the loved one battling a disease, teaching/coaching in caregivers' skills or organizing networks of family caregivers for mutual support.

Proposal

Objective

The objective of this study is to move issues related to family caregiving of the chronically ill to the center stage of marketing academia. Such chronic illnesses include 1) cancer, 2) neurodegenerative diseases (dementia/Alzheimer's disease, Parkinson's disease, ALS), 3) heart disease, 4) chronic obstructive pulmonary disease (COPD), and 5) kidney disease.

The reason for this move to the center stage of marketing academia results from the emerging awareness that organizing and waging a caregiving effort over months and years requires many of the skills business professionals use in creating and launching business ventures (Goodman, Rabow and Folkman 2020). For macromarketers, the interest in family caregiving arises from the externalities (costs paid by a third party) coming from loved ones receiving medical treatments as patients in the fee-for-service model of healthcare in developed countries, such as the US (Klimaviciute and Pestieau,2023).

In a traditional marketing approach, there is not much to say about family caregivers because medical professionals do not treat family members who are not patients. This is the end of story—except that as patients lose the ability to perform tasks of daily living (dressing, eating, bathing, toileting, continence and transition movements), family caregivers are the ones to help patients interact with the medical establishment and to help patients lead meaningful lives.

While often invisible to medical professionals in the healthcare system (just like the support structure for buildings in which we live and work), family caregivers become more important in delivering healthcare services as chronically ill patients decline.

The invisibility of family caregivers persists in the healthcare system despite the dependence on family caregivers delivering needed services to patients in the fee-for-service model of healthcare. Simply stated, if family caregivers did not deliver disabled patients to medical facilities, medical professionals could not perform their services and get paid.

As medical interventions become more sophisticated and complex, healthcare costs rise. Because of the current expense of hospital stays, family caregivers often continue the administration of complex treatments for their loved ones who return from the hospital. Such treatments include giving injections, managing multiple medications, performing wound care, assisting with physical therapies and occupational therapies, as well as conducting speech and swallowing therapies (to name a few).

In a marketing for a better world (BW) approach (Chandy et al. 2021)—(recognized as a macromarketing-inspired approach), could the family caregivers of chronically ill loved ones boost the quality of life for these patients and their family caregivers? Encouragingly, Moorman et al. (2024) include caregivers along with patients as "health care consumers' when depicting conventional actors in the healthcare system—removing the invisibility from caregivers. Notably, these researchers depict new healthcare actors as including 1) online reviews, 2) consumer-driven information platforms, 3) patient influencers, and 4) health communities. Any of these four new healthcare actors could direct their content or services to family caregivers for the purpose of improving the effectiveness of family caregivers.

In sum, researchers are beginning to include caregivers along with patients as actors in contemporary models of healthcare in which peer-to-peer influence becomes ascendant. Such a broader view of stakeholders in healthcare is timely and deserves the attention of marketing academics interested in developing knowledge about services, and about how ecosystems (such as the healthcare system) can evolve and change through a BW approach.

Structure of the Presentation

The study will first offer an overview of the healthcare system's effectiveness. Here, the researchers will highlight the challenges for holistic approaches to patient care that would feature

relational medicine (Berry et al. 2022). The study will also highlight the healthcare system's overreliance on and poorly preparing family caregivers of seriously ill patients. The authors will then highlight 1) the emerging role of peer-to-peer influence in a healthcare sector disrupted by networked consumers (Moorman et al. 2024). and 2) the importance of using a two-way lens to uncover BW opportunities (Moorman 2024). Such a two-way lens could start with a marketing activity to identify a BW challenge, or could start with a problem in the world and ask how a marketing activity contributes to the problem or could be a solution to the problem. The two-way lens refers to the two different foci for identifying a BW opportunity—focusing on the challenge or focusing on the marketing activity and reviewing the marketing activity to identify how the marketing activity contributes to the problem. For example, one could look at family caregiving (the challenge) or the way medical establishments fail to provide training and education to family caregivers about their new role as family caregivers.

The study will then highlight the case of Janice, describing her journey as a family caregiver of her husband, who lived with dementia/Alzheimer's disease for six years. Janice organized a caregiver support group in her hometown in Wyoming that continues to be well attended and active today. Despite receiving regular attention from medical professionals, Janice had to improvise many times for the sake of her husband's safety, such as removing the oven from their kitchen to prevent her husband from initiating cooking disasters resulting in kitchen fires that would burn down the house. Janice's case illustrates how family caregivers wind up learning more from other family caregivers than from medical professionals. Janice institutionalized peer-to-peer sharing by way of a weekly support-group meeting for those providing family caregiving for loved ones living with Alzheimer's.

General Orientation

The session will be focused toward generating new thinking about how macromarketing can guide researchers to develop new knowledge about how the gap between medical institutions and home institutions can be bridged. Evidence of such new knowledge could be seen in 1) the identification of new constructs, 2) the development of new models of how constructs interact, and 3) new thinking about service innovation that could boost the effectiveness of family caregiving of the chronically ill.

The key issues to be addressed will be as follows:

1) Can BW marketing (macromarketing-inspired marketing) bridge the gap between medical institutions (in a fee-for-service system) striving for standardization and efficiencies and family institutions (in a benevolence/charity system) striving for customization and quality of life for their loved ones whose conditions might be changing continuously?

2) What service innovations might be undertaken to bridge the gap between medical and family institutions?

3) What policies could be implemented that would foster innovation for for-profit ventures and non-profit enterprises resulting in more confident and able family caregivers throughout their terms as family caregivers?

JaniceJaniceJaniceJaniceJaniceJaniceJaniceJaniceJanice*Caregiving*

Janice's life took a radical turn when her husband of 23 years was diagnosed with dementia. For six years she was her husband's sole caregiver. In unknown and deeply dark waters, through many failures, she learned how to be a devoted caregiver. Janice's mission now as a widow, is to create a clear pathway in which caregivers lives are made easier.

Janice and her husband Al were married for 29 years. During the last 6 years of his life he suffered from Dementia/Alzheimer's. Janice was his sole caregiver. Al had been in advertising and the president of one of the world's largest advertising agencies. He was a man that made a difference in every aspect of his life. Janice and Al were both community leaders in Sedona and could be counted on to engage in a large way. They together lived a big life. Janice noticed changes in Al's memory but never suspected dementia, until she received a call from the police department saying her husband was parked on the side of the freeway and did not know to get home.. This is the sad beginning of their story together of surviving dementia. Because their large home in Sedona became a problem for Al, finding rooms, falling. They moved full time to their smaller Wyoming home.

Living in a rural community isolated from activities and long term friends Janice became desperate to speak to other caregivers. She placed an advertisement in the Laramie paper (50 miles from their home)… *" I am the sole caregiver of my husband who has Alzheimer's if you are walking that same hard path, meet me for coffee and pie at Perkins Bakery 3:00pm Thursday.* Two people showed up. The next week two more came…. for two years the group has met faithfully every Thursday… with 9-15 caregivers of loved ones with dementia.

The meeting was the one place they could speak freely about the hardships of caregiving, the constant 24-hour struggle, the loss of their former lives, and the dismay of lack of proper medical support or family understanding or help. Many times the group members have said…" This group has kept me alive." Sadly, sixty-five percent of caregivers die prior to the person with dementia. This is due to stress on their own health during caregiving duties that sometimes lasts for up to ten years or more.

A caregiver's life is an exceedingly difficult and lonely one. A caregiver does not want the job! A caregiver of a loved one with dementia must be patient, loving, devoted, always kind, ready and willing 24 hours a day. It is an impossible task. Yet somehow, caregivers do it and survive. Janice's experience has found the most effective way to survive is to partner with another caregiver going through the same trauma. To be truthful of how ugly it can be. How much they miss their ole lives. How inadequate they feel for the task, how unprepared.

It is now Janice's mission to proclaim the benefits of peer-to-peer weekly, in-person group sessions for caregivers led by caregivers.

Janice's proposal is simple. Any doctor seeing a patient with dementia is referred to a peer group. The doctor will know which of his caregivers are most suited to start and manage the group. Furthermore, Janice is certain that by teaching medical students and nursing students the benefits of partnering with the "at-home caregiver," their medical treatment would surpass present-day medical practice. This Spring, Janice will partake in the SOAR program at the Drucker School of Management at the Claremont Graduate University in California to create a plan and proposal to develop "peer-to-peer caregivers groups, led by caregivers" throughout the country.

The Need for Service Innovation to Develop Resilient Family Caregivers

More than 53 million served as family caregivers in the US in 2020—an increase of more than 20 per cent from 2015 **(Neller et al. 2024)**. By comparison, the US has just over 700,000 hospital beds **(American Hospital Association 2024)**. In short, the vast majority of healthcare is actually provided by families, rather than medical professionals **(Adler and Mehta 2014).** The United Nations estimates that family caregivers provide 75-90 percent of the care needed by the

ill and disabled (**Lacey et al. 2024).** In this way, family caregivers represent a silent workforce in societies around the world.

Commitment characterizes this silent workforce of family caregivers that work in challenging circumstances **(The Lancet Public Health 2024).** According to the Center for Disease Control and Prevention in the US, almost a third of family caregivers (31.3 per cent) provided 20 or more hours per week of care, and more than half (53.8 per cent) have given care for 24 months or more **(CDC 2024).**

Despite the centrality of family caregiving to patient well-being and to the reduction of healthcare costs, healthcare systems characteristically do not prepare family caregivers adequately to care for the seriously ill (Berry et al. 2022). Without such preparation and ongoing counseling, family caregiving remains a high-risk endeavor with linkages to impaired immunity, heart disease, and early death **(Berry et al. 2017)**. In a large-scale longitudinal study in the UK, family caregivers reported decreased mental health after transitioning to caregiving requiring more than 20 hours per week **(Lacey et al. 2024).** This effect was more pronounced for those living in the same home as their loved one and for caregivers 30-64 years of age (who likely have other standing commitments, such as raising children and working outside of the home).

"The whole family gets cancer," Len Berry, Senior Fellow at the Institute for Healthcare Improvement said **(Berry 2021)**. "The life of the family is changed dramatically and it needs support. Yet, the whole family gets inferior support."

Despite the stark challenges caregiving can present for families, many caregiving families for the chronically ill adjust to their threatening situations and achieve positive outcomes for their patients and for themselves **(Palacio et al. 2020).** Some family caregivers report personal growth for themselves, such as a redefined meaning of life and more effective interpersonal skills which will benefit others in times of difficulty **(Kenway 2023, p. 98).**

In sum, because of today's smaller families whose members tend to live more distant from each other, many remain unaware of how to approach the complexities and emotional challenges of caregiving **(Kenway 2023)**, until "it is there to be done" (Kleinman 2012). As the caregiving project unfolds over weeks, months and years, family caregivers must learn how to grow in their role of caregivers for their loved ones, as well as caring for themselves.

Currently, a holistic understanding of healthcare needs to be developed that focuses on healing, so that healthcare becomes more sustainable (Berry et al. 2024). In this way, the

marginalized in the healthcare system will be brought into view. These marginalized include the poor, the elderly and the family caregivers. A holistic (or stakeholder) understanding of family caregiving and how it can be comprehensively improved is critically needed but not yet available to scholars.

The purpose of this presentation is to bring this holistic (or stakeholder) understanding of family caregiving for the chronically ill who often must carry the additional burden of sadness because of the diminishing health of their loved one and because of the emotional pain of witnessing what will likely be the end of life for their loved one. Importantly, this presentation seeks to develop rich knowledge about resilient family caregiving in which caregivers grow when confronting such adversity.

An important goal of this study is to identify opportunities for healthcare service innovation to develop resilient family caregivers. Toward this end, researchers will interpret their findings with respect to relevant theories of social behavior so that theoretically grounded recommendations can be made for improving healthcare services featuring family caregivers. Possible innovations for family caregivers could include 1) the hospital/clinic registering the lead family caregiver as a patient along with the loved one who is battling a chronic disease (as is done at Memorial Sloan Kettering Cancer Center in New York City (Applebaum 2024), 2) local governments/NGOs establishing family caregiver support centers as done in Colorado Springs, Colorado (which focus on providing consulting services for family caregivers, as well as extended education programs about family caregiving), and 3) locally-organized peer-to-peer support groups for family caregivers.

References

Applebaum, A. (2024) *Stand By Me: A Guide to Navigating Modern, Meaningful Caregiving*. New York: S&S/Simon Element

Berry, L. L., Attai, D. J., Scammon, D. L., and Awdish, R. L. A. (2022). When the aims and the ends of health care misalign. *Journal of Service Research*, *25*(1), 160-184.

Berry, L. L., Yadav, M. S., and Hole, M. K. (2024). Reclaiming healthcare's healing mission for a sustainable future. *Journal of Service Research*, *27*(1), 6-27.

Chandy, R. K., Johar, G. V., Moorman, C., and Roberts, J. H. (2021). Better marketing for a better world. *Journal of Marketing*, *85*(3), 1-9.\

Goodman, S., M. Rabow, and S. Folkman. (2020*). Orientation to Caregiving: A Handbook for Family Caregivers of Patients with Brain Tumors*, Third edition, San Francisco, CA: University of California, San Francisco.

Kleinman, A. (2012). Caregiving as moral experience. *The Lancet*, 380(9853), 1550-1551.

Klimaviciute, J. and Pestieau, P. (2023). The economics of long-term care. An overview 1. *Journal of Economic Surveys*, *37*(4), 1192-1213.

Moorman, C., van Heerde, H. J., Moreau, C. P., and Palmatier, R. W. (2024). Marketing in the Health Care Sector: Disrupted Exchanges and New Research Directions. *Journal of Marketing*, *88*(1), 1-14.

Moorman, C. (2024). How to Be a Pro–Social Impact Scholar in Marketing. *Journal of Public Policy & Marketing*, *43*(3), 207-209.

Macromarketing systems and social conflict in South America

Cristian Sepulveda

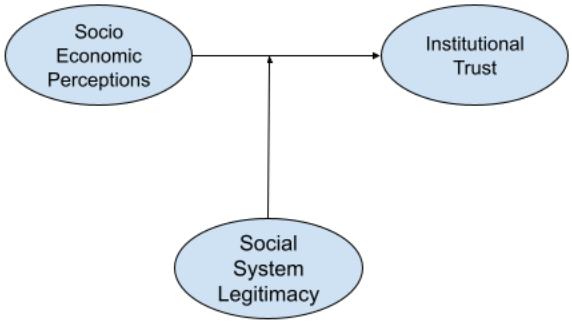
Mark Peterson

The 2019 social unrest in Chile, Colombia, and Ecuador revealed societal tensions that continue to evolve. Through the theoretical lens of social conflict theory (for instance, Barrios et al. 2016), this research will examine the role of macromarketing systems in these social conflicts. As such, the research question is:

How do macromarketing systems influence institutional trust through social system legitimacy in post-unrest Chile, Colombia, and Ecuador?

Recent studies show complex dynamics in Latin America, for instance, how homicide rates in Brazil moderate the effect of individual victimization on democratic legitimacy (Cardoso and Borba 2024a). These dynamics merit analysis because, for example, in Chile, the homicide rates have risen from 2.6 to 4.5 per 100 thousand habitants from 2019 to 2023 (Sanchez 2024), indicating that the situation has not improved but instead worsened. On the other hand, much has changed in the last 6 years. Currently, the discussion in Chile is on the pension system, which is critical for macromarketing due to its impact on market participation and social welfare, which ultimately influence how resources are distributed in a society. In Chile, the discussion is on how to implement the changes, but there is consensus that the individual contribution to pension funds needs to increase (from the current 10% to about 16% or 18%).

To examine these socio-economic dynamics across the three countries and their impact on institutional structures, we propose a model on the effect of socio-economic perceptions on institutional trust. Using the data from Cardoso and Borba (2024b), we will examine how social system legitimacy moderates the impact of consumer's socio-economic perceptions on institutional trust. This model and dataset will also allow for county comparisons, and as such, we will be able to compare factors such as institutional trust among countries.



Society can be viewed as a set of social institutions, with marketing systems as part of those institutions (Layton 2007). Based on Dixon (1984), the social systems perspective of macromarketing emphasizes several aspects directly associated with the social system legitimacy. Integration, for instance, requires communication and coordination, which relates to how the democratic system works, and the fact that the "social system must be protected from aggression" (Dixon 1984, p. 5) relates to the perceptions of neighborhood security. Along these lines, Dixon also proposes that "creating trust seems to be a major function of some social transactions" (Dixon 1984, p. 11), addressing trust as a fundamental element in social exchange. Moreover, trust is both a requirement and an outcome of social interactions (Dixon 1984, p. 6). As such, social system legitimacy includes items such as perceptions of satisfaction with the democratic and political systems as well as public confidence elements such as neighborhood security and interpersonal trust.

This research contributes to understanding how macromarketing systems influence societal well-being by examining the role of system legitimacy as a mediating mechanism between socio-economic perceptions and institutional trust in post-unrest contexts. This research advances macromarketing by identifying how market systems shape social stability and explaining variations in institutional trust across different countries.

Constructs and Variables

Socio-Economic Perceptions

- Perception of the Country's Economic Situation
- Perception of Personal Economic Situation
- Evaluation of Political Institutions

- Ethnicity
- Household income
- Years of schooling
- Sex
- Age
- Urban/Rural

Social System Legitimacy

- Satisfaction with Democracy
- Perception of Political System Pride
- Perception that people should support the political system
- Perception of Neighborhood Insecurity
- Interpersonal Trust

Institutional Trust

- Trust in the National Legislature
- Trust in the Executive
- Trust in Local Government
- Trust in the Judiciary System (Courts Guarantee Fair Trial)
- Trust in Elections
- Trust in the Police
- Trust in Political Parties
- Trust in the Media

References

Barrios, Andrés, Kristine de Valck, Clifford J. Shultz, Olivier Sibai, Katharina C. Husemann, Matthew Maxwell-Smith, and Marius K. Luedicke (2016), "Marketing as a Means to Transformative Social Conflict Resolution: Lessons from Transitioning War Economies and the Colombian Coffee Marketing System," *Journal of Public Policy & Marketing*, 35 (2), 185–97.

Cardoso, Gabriela Ribeiro and Julian Borba (2024a), "Violence and Democratic Legitimacy in Latin America: Causal Mechanisms and Contextual Effects," *Brazilian Political Science Review*, 18 (3), e0007.

Cardoso, Gabriela Ribeiro and Julian Borba (2024b), "Replication Data for: Violence and Democratic Legitimacy in Latin America: Causal Mechanisms and Contextual Effects," Harvard Dataverse.

Dixon, Donald F. (1984), "Macromarketing: A Social Systems Perspective," *Journal of Macromarketing*, 4 (2), 4–17.

Layton, Roger A. (2007), "Marketing Systems—A Core Macromarketing Concept," *Journal of Macromarketing*, 27 (3), 227–42.

Sanchez, J. (2024). Homicide rate in Chile from 2014 to 2023. https://www.statista.com/statistics/984913/homicide-rate-chile/

Microfranchises for war victims and victimizers' social and economic (re)integration

Andres Barrio

Adriano Cano-Cuervo

Social innovations have been defined as novel solutions to social problems for the common good. It is difficult to envision a more significant social problem than war. War has profound human, economic, and social consequences. In 2023, 59 countries had active armed conflicts across the world, resulting in approximately 340,000 deaths (Institute for Economics and Peace 2023). The economic impact of war is about $17.5 trillion, equivalent to 12.9% of global GDP (Global Finance 2024). Additionally, by 2023, over 108 million people were forcibly displaced worldwide due to conflict. Together, the consequences of war lead to distrust, exclusion, and discrimination throughout society (De Dreu and Knippenberg 2005). For these reasons, the sustainable development goal (SDG) #16 calls to promote peaceful and inclusive societies.

The consequences of war transcend conflict, often inciting further violence long after peace agreements are reached (Bilmes and Stiglitz 2008; De Rivera and Paéz 2007). Countries such as Congo (Temnér 2011), Afghanistan (Barakat and Zyck 2009), and Colombia (Albarracin et al. 2023) have experienced cycles of war after peace agreements were settled. Some sources of recurring conflict include ex-combatants' poverty, social exclusion, and trauma (Hill, Taylor, and Temin 2011; Suhrke and Berdal 2013). Consequently, public and private institutions have socially innovated by developing and implementing various initiatives to promote peace. Some of these peace initiatives involve markets development, known as 'peace through commerce,' and include to provide ex-combatants with business opportunities for transitioning into civilian life and sustainable livelihoods (Fort and Schipani 2004). Studies have acknowledged the positive effects of these market-based peacemaking efforts in helping ex-combatants transition from war economies to peace economies (Barrios et al. 2016), and in promoting fruitful interaction between ex-combatants and regular society (Barrios, Shultz and Montes 2019).

The previous literature has described the positive impacts of peacemaking initiatives, but the process by which these initiatives materialize has not been sufficiently explored. The complex nature of war makes the development of market-based peacemaking initiatives a collaborative effort among organizations from various sectors (e.g., public and private), a process known as cross-sector collaboration (CSC). This process is also emphasized by SDG#17 as required for the achievement of the goals. Therefore, the research question this study aims to address is: How can

cross-sector collaborations be developed for implementing social innovations that contribute to sustainable peace?

To address this question, this paper presents a case study of the market-based peace initiative "Minimarket 2X3." This micro-franchise provides grocery stores to war victims and ex-combatants, facilitating their economic and social reintegration. Developed through cross-sector collaboration among government, economic, and social organizations, the initiative supports the reintegration of victims and ex-combatants into Colombian society. Both primary and secondary data were used to reconstruct the initiative's design, implementation, and completion from 2010 to 2020. Data analysis was conducted iteratively, utilizing both deductive and inductive approaches.

Key findings from this analysis include insights into: a) the motivations, structures, and processes necessary for developing CSCs; b) the internal and external challenges encountered in CSCs; and c) the outputs and outcomes of CSCs related to the social reintegration of ex-combatants. These findings contribute to the literature by highlighting the advantages of using CSCs to promote the social reintegration of ex-combatants, demonstrating how innovative business models like micro-franchises can serve as social innovations for peacebuilding, and detailing the relational processes underpinning CSCs in the context of social innovation.

References:

Albarracín, Juan, Juan Corredor-Garcia, Juan P. Milanese, Iván H. Valencia, and Jonas Wolff (2023), "Pathways of Post-Conflict Violence in Colombia," *Small Wars and Insurgencies*, 34(1), 138-64.

Barakat, Sultan and Steven A. Zyck (2009), "The Evolution of Post-Conflict Recovery," *Third World Quarterly*, 30(6), 1069-86.

Barrios, Andrés, Kristine de Valck, Clifford J. Shultz, Omar Sibai, Katharina C. Husemann, Melanie Maxwell-Smith, and Marius K. Luedicke (2016), "Marketing as a Means to Transformative Social Conflict Resolution: Lessons from Transitioning War Economies and the Colombian Coffee Marketing System," *Journal of Public Policy and Marketing*, 35(2), 185-97. https://doi.org/10.1509/jppm.15.151

Barrios, Andrés, Clifford Shultz, and Juan C. Montes (2019), "Entrepreneurship as Boundary Object: Toward Reintegration of Colombia's Ex-Militants into Civil Society," *Journal of Macromarketing*, 39(4), 368-84. https://doi.org/10.1177/0276146719884606

Bilmes, Linda J. and Joseph E. Stiglitz (2008), *The Three Trillion Dollar War: The True Cost of the Iraq Conflict*. New York: W.W. Norton and Company.

De Dreu, Carsten K. W. and Daan Van Knippenberg (2005), "The Possessive Self as a Barrier to Conflict Resolution: Effects of Mere Ownership, Process Accountability, and Self-Concept Clarity on Competitive Cognitions and Behavior," *Journal of Personality and Social Psychology*, 89(3), 345-57.

De Rivera, Joseph and Dario Páez (2007), "Emotional Climate, Human Security, and Cultures of Peace," *Journal of Social Issues*, 63(2), 233-53.

Fort, Timothy L. and Cynthia A. Schipani (2004), *The Role of Business in Fostering Peaceful Societies*. Cambridge: Cambridge University Press.

Global Finance (2024), "Global News and Insight for Corporate Financial Professionals." Retrieved from https://gfmag.com/data/most-peaceful-countries/#:~:text=The%20economic%20impact%20of%20violence,each%20person%20on%20the%20planet

Hill, Roger, Grant Taylor, and Judith Temin (2011), *Would You Fight Again? Understanding Liberian Ex-Combatants Reintegration*. Special Report. Washington, DC: United States Institute of Peace.

Institute for Economics and Peace (2023), *Global Peace Index 2023*. Retrieved from https://www.economicsandpeace.org/wp-content/uploads/2023/09/GPI-2023-Web.pdf

Suhrke, Astri and Mats Berdal, eds. (2013), *The Peace in Between: Post-War Violence and Peacebuilding*. London: Routledge.

Temnér, Anders (2011), *Violence in Post-Conflict Societies: Remarginalization, Remobilizers and Relationships*. London: Routledge.

Moralities of Self-Tracking in Sports and Fitness: A CRT Perspective on Dominant Narratives

Federico Garcia Baena

Miriam Leite Farias

Sports as an institution are founded on moralities historically attached to values, such as courage, effort and surpassing oneself (Durántez Corral et al. 2010). This universal ideology positions will power and discipline over social affordances, and praises humanist moralities (Ibid.) as forms of moral in action that glorify equality and loyal competition (Vieille Marchiset, Saint-Martin, and Attali 2015). "Sports has been celebrated as a post-racial and meritocratic utopia disconnected from social, economic, and political realities" (Fuchs 2021). Discourses about this disciplinary institution rely on these moralities by profoundly subscribing to its meritocratic ideals, especially as means of overcoming social exclusion or discrimination (Gasparini and Knobé 2005). The role of these moralities in the reproduction of a violent socio-historical order has been previously documented in other studies. For instance, sports have historically been a public instrument for social inclusion policies (Gasparini 2008), where discourses of meritocracy glorifying self-disciplined athletes, responsible for their own social uprising and integration, through complete commitment to sports institutions, ideals and beliefs, are instrumentalized (Gasparini and Knobé 2005). By relying on self-responsibilisation, self-determination and self-accountability, these public policies tend to individualize collective, socio-historical structures of oppression (Le Yondre 2015) and to reproduce a specific socio-historical oppressive order and racial hierarchy (Bouvier 2010).

Within this context, we investigated the role of specific technologies in the reproduction of that socio-historical order and its relationship to sports moralities. We focused on technologies used to track and optimize sports performances (sports connected watches, fitness trackers and apps). In sum, self-tracking refers to the datafication of bodily activities using connected technologies with the aim of improving them (Lupton 2015). Self-tracking is present in different sociocultural contexts, such as health and care (Weiner et al. 2022), work and productivity (Moore and Robinson 2016), or lifestyle and sports (Kristensen, Kuruoglu, and Banke 2021). Far from being neutral, these technologies contribute to the interiorization of neoliberal imperatives of self-management and self-optimization (Ruckenstein and Schüll 2017) and carry promises of self-empowerment (Ruckenstein and Pantzar 2017), characteristic of the datafication and platformization of society (Van Dijck, Poell, and De Waal 2018).

Our method consisted in a discourse analysis of marketing materials produced by three of the most visible brands on the field of self-tracking (Polar, Garmin, WHOOP). The brands discourses were analyzed online on their websites, social media, newsletters and other types of advertising. Through a Critical Race Theory perspective (Delgado and Stefancic 2023), our findings point demonstrate how self-tracking, within sports and fitness cultures, aids the reproduction of power dynamics of exclusion of consumers at the intersection of race and class. First, we observed how whiteness appears as the archetype of sports excellence (performance and scientific) through self-tracking market discourse. The predominance of white imagery in brand's discourses about self-tracking contributes to the manufacture of specific imaginaries around whiteness. By positioning whiteness as a central, and somewhat unique frame of reference for representation, these market practices contribute to the normalization of whiteness. Second, in association with sports cultures and their own relation to class, self-tracking is sociohistorical positioned as being naturally reserved for higher classes. This reveals the permeability of such technologies in the reproducing of the social order through self-tracking (in)accessibility. Therefore, these results considerably limit the potential of self-tracking to empower consumers beyond pre-established socio-historical racial and class structures (Granjon 2009).

In conclusion, our study reveals the role of self-tracking in the reproduction of racist social orders, by contributing to the normalization of whiteness and cementing its position at the top of the social scale. This research contributes to the literature on technologies, their corresponding market discourses, and their roles in perpetuating social inequalities. By providing a contextualized analysis of self-tracking discourses, we highlight the role of socio-historical structures operating within consumer society, and sports and fitness cultures, reproducing and perpetuating racial hierarchies and exclusion.

References

Bouvier, P. (2010), “Colonization and Sports Practices,” Journal des anthropologues, French Association of Anthropologists, (120-121).

Delgado, R., and Stefancic, J. (2023), Critical race theory: An introduction (Vol. 87). NyU press.

Durántez Corral, C., Pérez Turpin, J. A., Martínez Vidal, A., Mateos Padorno, C., Martínez Patiño, M. J., and González Molina, A. (2010), “Principles of the Olympic movement,” Journal of Human Sport and Exercise, 5(1), 3-14.

Fuchs, M. (2021), "Livin'Da dream? Playing black, illusions of meritocracy, and narrative constraints in sports video game story modes," European journal of American studies, 16(16-3).

Gasparini, W. (2008), "Integration through sport. Political genesis of a collective belief," Sociétés contemporaines, (1), 7-23.

Gasparini, W. and Knobé, S. (2005), "Salvation through sport: Effects and paradoxes of a local integration policy," Déviance et Société, 29, 445-461.

Granjon, F. (2009), "Digital Inequalities and Social Recognition: Popular Uses of Connected Computing," Les Cahiers du numérique, 5(1), 19-44.

Kristensen, D. B., Kuruoglu, A. P., and Banke, S. (2021), "Tracking towards care: Relational affordances of self-tracking in gym culture," Sociology of Health & Illness, 43(7), 1598-1613.

Le Yondre, F. (2015), "Sport in social intervention: the individual responsible but under control," Informations sociales, 187, 72-78.

Lupton, D. (2015), Digital Sociology. London: Routledge.

Moore, P. and Robinson, A. (2016), "The quantified self: What counts in the neoliberal workplace," New media & Society, 18(11), 2774-2792.

Ruckenstein, M. and Pantzar, M. (2017), "Beyond the quantified self: Thematic exploration of a dataistic paradigm," New Media & Society, 19(3), 401-418.

Ruckenstein, M. and Schüll, N. D. (2017), "The datafication of health," Annual review of anthropology, 46, 261-278.

Weiner, K., Will, C., Henwood, F., and Williams, R. (2022), "Everyday curation? Attending to data, records and record keeping in the practices of self-monitoring," Media in Action, 3, 141.

Van Dijck, J., Poell, T., and De Waal, M. (2018), The platform society: Public values in a connective world. Oxford: Oxford University Press.

Vieille Marchiset, G., Saint-Martin, J., and Attali, M. (2015), "Sports, a school of giving? Transmitting an agonistic vision of the world," Revue du MAUSS, (2), 148-160.

Abstract

This study examines the #BookTokBrasil community, exploring how digital narratives—control, supporting, and interaction—shape collective identity and engagement. Using qualitative and digital methods, we analyze TikTok's role in fostering belonging and consumption practices. Findings illuminate the interplay between platform affordances, narrative practices, and the cohesion of consumer communities in the digital age.

Introduction

The advent of digital platforms has transformed how consumer communities are formed and maintained, offering new spaces for interaction and content creation. Among these, TikTok has emerged as a prominent platform for fostering niche communities, such as #BookTok, where users connect over a shared passion for books. These communities are not only spaces for shared interests but also arenas for creating and circulating narratives that strengthen the sense of belonging and encourage consumption practices.

Consumer communities, as defined by Muniz and O'Guinn (2001), are groups centered around shared consumption activities, creating bonds of belonging through engagement. However, the digital age has introduced new dynamics, with platforms like TikTok enabling the production and dissemination of content that shapes these communities in unique ways (Maddox and Gill 2023). The #BookTokBrasil community exemplifies this phenomenon, bringing together Brazilian readers who share recommendations, experiences, and practices related to book consumption (Snel 2024).

Digital platforms have profoundly influenced how consumer communities operate, transforming traditional consumption landscapes into dynamic, interconnected spaces. Platforms like TikTok exemplify these shifts by fostering vibrant consumer communities through collective participation and engagement (Kozinets et al. 2008; Martens et al. 2022). In the case of #BookTokBrasil, these community dynamics are clearly visible, as the shared narratives and recommendations strengthen bonds among members while encouraging collective cultural consumption. For instance, the collaborative creation of content, such as book reviews and reading recommendations, reflects the shared identity and purpose of the community (Kozinets et al. 2008). Moreover, these practices extend beyond the digital realm, inspiring physical

gatherings such as literary events and book fairs, where members connect in person to reinforce their sense of belonging (Brailas and Sotiropoulou 2023; Martens et al. 2022).

These transformations highlight the interplay between digital narratives and consumer engagement, demonstrating how online spaces catalyze shifts in the behaviors and connections of consumer communities. As users share their reading experiences and engage in emotionally vulnerable storytelling, they build a collective identity that fosters deeper community bonds (Brushwood Rose 2016). #BookTok has made reading an enjoyable and appealing activity for younger audiences, particularly during the pandemic, by emphasizing its entertainment value (Martens et al. 2022). Furthermore, users seek to discover new literature and improve their reading habits through engaging content shared within the community **(Ünlü 2021).** The #BookTokBrasil phenomenon illustrates how digital communities transcend traditional boundaries, creating inclusive spaces that redefine the modern consumer experience.

This study explores the digital narratives employed by members of the #BookTokBrasil community to strengthen their collective identity and foster engagement with reading. Drawing on a qualitative approach and digital methods (**Caliandro and Gandini 2017**; **Rogers 2019**), we identify three types of narratives that contribute to the cohesion and growth of this consumer community: control narratives, which establish guidelines for community participation in reading; supporting narratives, which sustain engagement through book reviews, publishing market insights, and personal experiences; and interaction narratives, which capture moments of connection, particularly during major literary events like the Bienal.

By analyzing the content produced within #BookTokBrasil, this research sheds light on how digital platforms facilitate the creation of narratives that not only encourage consumption but also reinforce community belonging. The findings aim to advance the understanding of consumer communities in the digital age, highlighting the interplay between platform affordances, narrative practices, and collective engagement.

Consumption Communities and Digital Narratives

Consumer communities (Muniz and O'Guinn 2001) have long been a central topic in marketing and consumer behavior research. With the proliferation of social networks, these communities have taken on new dimensions, as the boundaries of belonging become increasingly fluid in digital environments. Traditionally, consumer communities are characterized by groups of

individuals who share a common consumption activity, fostering a sense of belonging and commitment through engagement with shared consumption practices (Muniz and O'Guinn 2001; Thomas et al. 2013; Dalli 2021).

Research has explored these communities from various angles, including participation motivations (Behl and Jain 2023; Muniz and O'Guinn 2001), member behavior (Canniford and Shankar 2013; Nelson and Otnes 2005), and their migration to online spaces (Pyo et al. 2023; Zhen and Twyman 2024). Dalli (2021) study examines how, since the 1990s, consumption has shifted from being viewed solely through the lens of traditional factors (such as culture and social class) to being analyzed through social interactions and consumption practices. Furthermore, the article highlights that consumer communities have evolved from physical groups into more dynamic networks, driven by digital advancements, where consumers play an active role in value creation and innovation.

In the context of digital environments, **Chapman and Dilmperi (2022)** emphasize that the production and sharing of content are critical for community building. Interaction among members facilitates the dissemination of information, often mediated by platform-driven incentive systems (Pyo et al. 2023; Zhen and Twyman 2024). Within these platforms, digital narratives play a pivotal role in shaping and sustaining community dynamics.

Narratives, defined as stories that provide meaning to experiences (Bennett and Royle 1999) that help us disseminate stories from the teller to the receiver (Van Laer et al. 2014), are key mechanisms for sharing and understanding within communities. The process of narrative reproduction involves crafting, sharing, and interpreting stories (Gubrium and Holstein 1998), which are increasingly mediated by digital platforms (Kozinets 2019). Social media enables the circulation of narratives through posts, comments, mentions, and tags, constructing a shared social backdrop for understanding individual and collective behaviors. As Pera and Viglia (2016) note, these digital storytelling practices create experiences and foster engagement among users.

TikTok's "short video + e-commerce" model enhances consumer purchasing demand by providing convenience and a wide array of product options (Teo, Tee and Liew 2023). As a powerful marketing tool, TikTok leverages social media and viral marketing strategies to exert a significant influence on consumer purchasing decisions (Haryanto et al. 2022). This interplay between TikTok's algorithm-driven content and its e-commerce integration exemplifies how platforms shape consumption behavior while fostering digital communities.

One prominent example of digital consumption communities is #BookTok, a community on TikTok centered on the practice of reading. In Brazil alone, TikTok has over 74 million users, and the hashtag #booktokbrasil features more than 2.5 million posts (Pavan 2022). The #BookTok community has significantly influenced book consumption, contributing to the sale of 36.67 million books in 2024, generating revenues of R$1.86 billion, or approximately 7 billion dollars (Snel 2024). These numbers illustrate how digital platforms can catalyze shifts in consumption patterns, blending online and offline activities.

The synergy between digital and physical spaces is particularly evident in the #BookTokBrasil community, where events such as literary fairs and book launches complement online engagement. Physical spaces like bookstores and events inspire digital storytelling, as users share their experiences through video content, amplifying event visibility and fostering a continuous interplay between online and offline environments. This dynamic mirrors findings from Avery et al. (2013), who highlight how physical retail spaces can drive complementary growth in online activities. Similarly, the advent of digital platforms has introduced new pricing strategies, where the accessibility of online information influences competition in physical markets (Choi and Suh 2005).

By blending these elements, the #BookTokBrasil community exemplifies how digital narratives and physical experiences can reinforce one another, creating a cohesive ecosystem of engagement and consumption. While studies like Maddox and Gill (2023) have explored how user-generated content and TikTok's interface shape imagined communities, further research is needed to unpack the digital narratives driving these practices. Specifically, understanding how these narratives contribute to the interaction between physical and digital environments can advance our knowledge on consumer behavior in hybrid consumption spaces.

Methodology

To identify and analyze the digital narratives promoted by the BookTok Brazil community, we adopted a qualitative approach to social media research (**Caliandro and Gandini 2017**), grounded in the principles of digital methods (**Rogers 2019**). This approach acknowledges the agentic power of the platform in shaping content production and sharing, guided by the principle of "following the actors" **(Latour 2005).**

Data collection was conducted between August and October 2024, focusing on the

hashtags #BookTokBrasil, #BookTokkBrasil, #booktokbrasil, and #booktokbrasileiro, which were identified as having the highest number of associated posts on TikTok. The hashtags were tracked directly on the TikTok platform using its built-in content listing tool. Videos linked to these hashtags were saved to the researchers' profiles, and their corresponding links were organized in a Google Drive folder for systematic analysis. The first 100 videos recommended by the platform for each hashtag were collected, with video durations ranging from 15 seconds to 1 minute. Each video was watched in its entirety, with the research team dividing the workload to ensure thorough review.

The data collected were analyzed qualitatively using content analysis **(Bardin 1991)**. This analysis led to the identification of thematic categories that provided insights into the behavior of the BookTok community on TikTok and the digital narratives they create. These categories serve to illuminate how this consumption community engages within the platform and fosters collective practices. The subsequent section explores the thematic categories identified as digital narratives, emphasizing their contribution to reinforcing the BookTok consumer community on the platform.

Digital Narratives to Strengthen a Consumer Community on TikTok

Is this where you asked for book recommendations? The fantastic world of #BookTokBrasil awaits you! Here, you'll find people who, just like you, are searching for stories and characters to bring into their lives! So, create your video, post using the hashtag, and share your suggestions! (BookTokBrasil n.d.).

This invitation encapsulates the essence of the #BookTokBrasil community, which is built around the production and dissemination of content related to book consumption. Through this shared purpose, members of the communities create a collective space that fosters connection, engagement, and collaboration.

The content generated within this community employs various narrative strategies aimed at strengthening the sense of belonging and encouraging the central practice of book consumption. The community reflects a modern consumer culture, where individuals derive a sense of belonging from shared reading habits, aligning with Boorstin's concept of consumer communities (Friedman et al. 1993). BookTok serves as a platform where users connect through

shared literary interests, fostering friendships and social networks (Cuestas et al. 2022). Additionally, participating in the BookTok community can enhance one's social identity, as users gain recognition for their reading preferences and contributions (Sukoco and Wu 2010). Based on our analysis, three distinct styles of digital narratives were identified among members of the #BookTokBrasil community: Control Narratives, Supporting Narratives, and Interaction Narratives. These are detailed in the following sections.

Control Narratives

Control narratives aim to establish guidelines for community members to engage in the central consumption practice of reading. These narratives often focus on content such as "How to create your reading journal," "Making your bookmarks on Kindle," and "Tracking the number of books read in 2024." Such content is predominantly produced by influencers **(Campbell and Farrell 2020),** who hold significant relevance within the community and seek to shape the standard practices for reading:

The literary planner works as a space for you to document your readings, but it's more than that—it catalogs, stores information about each book you've read, and allows for small reflections on how these readings have impacted or transformed your life. The planner is super intuitive, and you can fill it out however you like. The important thing is to have one! (Alexsandra 2023).

Key practices promoted through control narratives include maintaining a reading journal, highlighting memorable passages in both physical and digital books, and using tools like a Kindle for digital reading. These recommendations are often visually reinforced with material elements such as notebooks, post-its, and other accessories, which help to illustrate and legitimize the narrative.

Control narratives, therefore, serve as a guide for community members, encouraging them to adopt practices deemed essential by influential figures within the group. By doing so, these narratives establish a collective modus operandi that shapes and strengthens the community's shared engagement with reading.

Research conducted at UC Berkeley and Stanford has advanced the development of interfaces that enable the simultaneous manipulation of physical and digital representations, thereby enhancing user experience (Klemmer 2005). A study by Colledani et al. (2024) introduced the concept of "physical-digital integration," emphasizing how individuals perceive their physical

and digital environments as interconnected. This integration is particularly evident in control narratives within the BookTok community, where readers seamlessly combine digital tools, such as e-readers like the Kindle, to organize their reading materials while maintaining physical journals for notes and summaries.

Supporting Narratives

Supporting narratives aim to assist community members in consistently engaging with reading practices by providing information about the publishing market, book reviews, and personal reading experiences. These narratives are often presented in videos with themes such as "5 books for beginners," "Book Review of The Maid," "Books to change your life," "Books by Colleen Hoover." For instance: "Recommending my favorite books! Starting with my favorite, This is how it ends. Guys, this book captivated me and encouraged me to read more, because I wasn't someone who enjoyed reading. It's definitely worth buying!" (Tulianne 2024).

In addition to offering reviews, supporting narratives cater to members with varying levels of familiarity with the core activity of reading:

These books are for everyone, really. So, if you've been in the literary world for a long time, you can still enjoy them. They're very easy to read, with engaging stories that are perfect for those who are just starting and want to immerse themselves in this literary world (Marques 2023).

Through the sharing of recommendations and evaluations, supporting narratives expand the repertoire of the #BookTokBrasil community. They foster a collaborative environment where members can discover new books, enhance their reading habits, and deepen their engagement with the literary world. Users share personal stories related to books, creating a collective identity that strengthens community bonds (Martens et al. 2022). Digital storytelling also encourages diverse voices, allowing individuals to express unique perspectives, which fosters an inclusive environment (Brailas and Sotiropoulou 2023).

Interaction Narratives

Interaction narratives focus on capturing moments of connection between community members, particularly during significant events in the literary world, such as the Bienal. This annual event brings together various publishers, offering book sales and lectures with authors. Content creators seize these opportunities to document these encounters, reinforcing the community's presence in the offline world: "I went to the book fair in São Paulo and gave out

books to you! It was wonderful meeting you all and sharing this experience!" (Lane 2023).

These moments are shared not only through videos of meetups but also through vlog-style content that highlights the experience of participating in community events:

First day of the Biennial, and let's check out the TikTok stand—look how amazing! We have a space to record, a space to sit and chat, a space to go live, and coverage of the entire event! Only those who attend will see it! (Neiva 2023).

Interaction narratives play a crucial role in strengthening the sense of belonging within the community. By showcasing opportunities to meet fellow members and participate in exclusive events, these narratives foster deeper connections and reinforce the shared identity of the #BookTokBrasil community. The integration of analog reading with digital sharing on TikTok creates a unique sociotechnical environment that innovatively promotes reading (Martens et al. 2022; Cuestas et al. 2022). This reflects broader cultural trends, where young people engage with literature in new ways via digital platforms (Wiederhold 2022).

BookTok users often promote specific books or authors, increasing brand loyalty through word-of-mouth and shared experiences (Zhang and Zheng 2021). The platform's design fosters high levels of interactivity, which is crucial for building strong community bonds and enhancing user engagement (Zhang and Zheng 2021). This phenomenon can be observed in real-world activations, such as the "Most Watched on TikTok 2024" bookstore, where Brazilian actor Antonio Fagundes was seen discovering the BookTok community, the largest literary community on the internet (Livraria dos Mais Assistidos no TikTok, 2024).



The narratives of control, support, and interaction work in tandem within a content production cycle to strengthen the consumer community on the digital platform. This cycle reinforces the community by disseminating knowledge, sharing experiences, and establishing behavioral norms and a sense of belonging (Thomas et al. 2013). BookTok participants engage in storytelling that involves emotional vulnerability, enhancing emotional connections among community members (Brushwood Rose 2016). The structure of this production cycle is illustrated in Figure 2.

Figure 2. Content production cycle strengthening the consumer community



Users on BookTok produce a wide range of content, including reviews, recommendations, and vlogs, catering to diverse reader interests (Karhawi et al. 2024). The platform fosters emotional connections among users by emphasizing shared experiences over critical analysis, thereby enhancing engagement and creating a sense of community (Teel and Lund 2024). Books that gain popularity within the BookTok community often achieve mainstream success, disrupting traditional publishing structures and promoting more diverse narratives (De Melo 2024; Balling and Martens 2024).

BookTok encourages users to share their reading experiences, creating a vibrant community where members discuss books they love or dislike (Martens et al. 2022). Additionally, the platform facilitates collaborative content creation, where users contribute reviews, recommendations, and creative interpretations of literature, reflecting the dynamics of consumer crowds (Kozinets et al. 2008).

Digital storytelling empowers users to rewrite their experiences, leading to personal

growth and a deeper connection with the community (Brailas and Sotiropoulou 2023). The findings of this research contribute to the literature on consumer communities by identifying the digital narratives employed by members to foster community cohesion. These narratives leverage the structural affordances of digital platforms to promote the exchange of knowledge, experiences and behavioral norms. The rise of BookTok reflects broader cultural changes in how young people interact with literature, highlighting the role of digital platforms in shaping modern reading practices (Wiederhold 2022). Through its unique blend of social interaction, entertainment, and knowledge-sharing, BookTok redefines the boundaries of consumer communities, promoting both personal and collective engagement with literature (Martens et al. 2022; **Ünlü 2021**; Cuestas et al. 2022). By examining how these narratives function within a specific digital community, this study offers insights into the mechanisms underpinning the development and sustainability of consumer communities in online environments.

References

Alexsandra, P. [@paolaaleksandra] (2023), Já conhece o planner literário da @Aluz | PAPELARIA ???? #booktok #books #livrosemaislivros #leitura #planner #booktokbrasil [Video]. TikTok. https://www.tiktok.com/@paolaaleksandra/video/7299960412706016518?is_from_webapp= 1&web_id=7319877224529085957

Avery, J., Steenburgh, T. J., Deighton, J., and Caravella, M. (2013), Adding bricks to clicks: on the role of physical stores in a world of online shopping. *NIM Marketing Intelligence Review*, *5*(2), 28-33.

Balling, G. and Martens, M. (2024), BookTok Helped Us Sell It: How TikTok Disrupts Publishing and Fuels the# Romantasy Boom. *Convergence*, 13548565241301271.

Behl, A. and Jain, K. (2023), The Dark Side of Brand-Based Online Communities: The Role of Culture. *Journal of Global Marketing*, 36(4), 241-244.

Bennett, A. and Royle, N. (1999), Introduction to Literature, Criticism and Theory, Hemel Hempstead: Prentice Hall.

BookTokBrasil. [#booktokbrasil] (n.d.), Foi aqui que pediram dicas de livros? [TikTok profile]. TikTok. Retrieved November 22, 2024, from https://www.tiktok.com/tag/booktokbrasil?is_from_webapp=1andsender_device=pc

Brailas, A. and Sotiropoulou, C. (2023), Relational, appreciative, and process-oriented digital

storytelling: A duoethnography. *Human Arenas*, 1-21.

Brushwood Rose, C. (2016), The subjective spaces of social engagement: cultivating creative living through community-based digital storytelling. *Psychoanalysis, Culture and Society*, *21*(4), 386-402.

Canniford, R. and Shankar, A. (2013), Purifying practices: How consumers assemble romantic experiences of nature. *Journal of Consumer Research*, 39(5), 1051-1069.

Choi, Y. J. and Suh, C. S. (2005), The death of physical distance: An economic analysis of the emergence of electronic marketplaces. *Papers in Regional Science*, *84*(4), 597-614.

Colledani, D., Anselmi, P., and Robusto, E. (2024), Development of a scale for capturing psychological aspects of physical–digital integration: relationships with psychosocial functioning and facial emotion recognition. *AI & society*, *39*(4), 1707-1719.

Cuestas, P., Pates, G., and Saez, V. (2022), El fenómeno booktok y la lectura en pandemia: jóvenes, pantallas, libros y editoriales. *Austral Comunicación*, *11*(1).

Dalli, D. (2021), Consumers and consumption: from individual, to collective, and beyond. *Italian Journal of Marketing*, *2021*(1), 1-4.

De Melo, A. (2024), The Influence of BookTok on Literary Criticisms and Diversity. *Social Media+ Society*, *10*(4), 20563051241286700.

Friedman, M., Vanden Abeele, P., and De Vos, K. (1993), Boorstin's consumption community concept: A tale of two countries. *Journal of Consumer Policy*, *16*, 35-60.

Gubrium, J. F., and Holstein, J. A. (1998), Narrative practice and the coherence of personal stories. Sociological quarterly, 39(1), 163-187.

Hagberg, J., and Kjellberg, H. (2020), Digitalized markets. *Consumption Markets and Culture*, *23*(2), 97-109.

Haryanto, A. A. F., Komariah, K., and Danial, R. D. M. (2021), Social Media And Viral Marketing Analysis Of Purchase Decisions Through Tiktok Applications. *Inovbiz: Jurnal Inovasi Bisnis*, *9*(2), 33-39.

Karhawi, I., Iossi, S. S. S., and Fernandes, C. M. (2024), BookTok: o papel dos criadores de conteúdo do TikTok no estímulo à leitura no Brasil. *Revista Eco-Pós*, *27*(2), 163-190.

Klemmer, S. R. (2005), Integrating physical and digital interactions. *Computer*, *38*(10), 111-113.

Kozinets, R. (2019), Netnography: The essential guide to qualitative social media research.

Kozinets, R. V., Hemetsberger, A., and Schau, H. J. (2008), The wisdom of consumer crowds:

Collective innovation in the age of networked marketing. *Journal of macromarketing*, *28*(4), 339-354.

Lane, L. [@leonilane]. (2023, September 3), eu amo vocês #booktokbrasil #bienaldolivro [Video]. TikTok. https://www.tiktok.com/@leonilane/video/7274706253819972869?is_from_webapp=1&web _id=73198772245290859

Livraria dos Mais Assistidos no TikTok (2024, December 20), *Diretamente da Livraria dos Mais Assistidos no TikTok 2024, @antoniofagundes descobrindo o BookTok, a maior comunidade literária da internet!* [Reel]. Instagram. https://www.instagram.com/reel/DDinnAwu9SD/?igsh=MTcyY2EyeXVuMjA1MQ%3D%3D

Maddox, J. and Gill, F. (2023), Assembling "Sides" of TikTok: Examining Community, Culture, and Interface through a BookTok Case Study. Social Media+ Society, 9(4), 20563051231213565.

Marques, M. [@bmyart] (2023, July 25), Replying to @Mariana quais desses vcs já leram?? #indicacaodelivros #booktokbrasil #livros #books [Video]. TikTok. https://www.tiktok.com/@bmyart/video/7259827595628383494?is_from_webapp=1&web_i d=7319877224529085957

Martens, M., Balling, G., and Higgason, K. A. (2022), # BookTokMadeMeReadIt: young adult reading communities across an international, sociotechnical landscape. *Information and Learning Sciences*, *123*(11/12), 705-722.

Muniz, A.M. and O'Guinn, T.C. (2001), Brand community. Journal of Consumer Research, 27(4), 412-432.

Neiva, T. [@bmyart] (2023, September 6), Bienal do Rio 2023! Chega aíii!!! #booktokbrasil #livros @Bienal do Livro Rio @TikTok Brasil [Video]. TikTok. https://www.tiktok.com/@theagoneiva/video/7275772496580709638?is_from_webapp=1&w eb_id=7319877224529085957

Nelson, M.R., and Otnes, C.C. (2005), Exploring cross-cultural ambivalence: a netnography of intercultural wedding message boards. Journal of Business Research, 58(1), 89-95.

Pavan, B. (2022). TikTok converte mais que Youtube e vira oásis de marcas para o público jovem. Available at: https://istoedinheiro.com.br/tiktok-converte-mais-que-youtube-e-vira-

oasis-de-marcas-para-o-publico-jovem/ (accessed 03 January 2024).

Pera, R., and Viglia, G. (2016), Exploring how video digital storytelling builds relationship experiences. Psychology and Marketing, 33(12), 1142-1150.

Pyo, T.H., Tamrakar, C., Lee, J.Y., and Choi, Y.S. (2023), Is social capital always "Capital"?: Measuring and leveraging social capital in online user communities for in-group diffusion. Journal of Business Research, 158, 113690.

Snel (2024), 9º Painel de Varejo de Livros no Brasil. Available at https://snel.org.br/9o-painel- de-varejo-de-livros-no-brasil/#:~:text=Foram%2036%2C67%20milh%C3%B5es%20de,de%20R%241%2C75%20bilh%C3%A3o.

Sukoco, B. M. and Wu, W. Y. (2010), The personal and social motivation of customers' participation in brand community. *African journal of business management*, *4*(5), 614.

Teel, Z. A. and Lund, B. (2024). BookTok Community Building: Dissecting Fangirl Behavior on TikTok. *Proceedings of the Association for Information Science and Technology*, *61*(1), 1102-1103.

Teo, S. C., Tee, W. Y., and Liew, T. W. (2023), Exploring The Tiktok Influences On Consumer Impulsive Purchase Behaviour. *International Journal of Business and Society*, *24*(1), 39-55.

Thomas, T., Price, L.L., and Schau, H.J. (2013), When differences unite: Resource dependence in heterogeneous consumption communities. Journal of Consumer Research, 39(5), 1010-1033.

Tullianne. [@_tuliannemaravilha]. (2024, November 18), Indicação de livros q eu amo #booktok #fyp #books [Video]. TikTok. https://www.tiktok.com/@_tuliannemaravilha/video/7438665108240207159?is_from_webap p=1&web_id=7319877224529085957

Ünlü, S. and Yaşar, L. (2022), Literature gathering as a cultural event: booktube participation. *Folklor/Edebiyat*, *28*(111), 637-660.

Van Laer, T., De Ruyter, K., Visconti, L. M., and Wetzels, M. (2014), The extended transportation-imagery model: A meta-analysis of the antecedents and consequences of consumers' narrative transportation. Journal of Consumer research, 40(5), 797-817.

Vindigni, G. (2023), Cyber-Physical Social Media Platforms and Their Market Influence. European Journal of Applied Sciences–Vol, 11(2).

Wiederhold, B. K. (2022), BookTok made me do it: the evolution of reading. *Cyberpsychology, Behavior, and Social Networking*, *25*(3), 157-158.

Zhang, Z. and Zheng, L. (2021), Consumer community cognition, brand loyalty, and behaviour intentions within online publishing communities: An empirical study of Epubit in China. *Learned publishing*, *34*(2), 116-127.

Zhen, L. and Twyman, M. (2024), Do inclusive incentive systems encourage prosocial or competitive behavior in online communities? New Media & Society: 14614448241243099.

Opening the gates: bringing gatekeeping theory to marketing

Ricardo Gomes do Amaral Filho

Lucia Salmonson Guimarães Barros

Benjamin Rosenthal

This paper bridges gatekeeping theory and marketing by redefining it as a dynamic, multilevel process shaping symbolic and technological dimensions. While widely studied in media, its role in marketing remains underexplored. Its relevance in multiple marketing studies and approaches, is presented though we will concentrate on market access processes. An initial comparative framework, an updated definition of the theory and marketing research possibilities are presented.

The concept behind gatekeeping theory was born in Lewin's Field Theory (1951). In that seminal work, the scientist was interested in changing food habits by analysing how psychological and non-psychological forces acted. So, he decided to study the process – as raw food went from farm to table. He saw it as two pathways (a buying and a selling channels) in which *gates* (a metaphor he took from the research), affected by multiple positive and negative forces, would affect their subsequent sequences. Each negotiation reflected how food would be transformed, lost, affected, labelled, and transported.

In summary, each gate works not simply as a dichotomic pass-not-pass blockade but as an iterative moment of action or decision. For Lewin, "the process is, but the epiphenomenon, the real object of study is the constellation of forces (Ibid., p. 196)." This definition leads us to a crucial boundary: without a defined end product, there is no gatekeeping process. Gatekeeping should be seen as a systemic approach, focusing on the iteration among interconnected factors rather than the relationship between individual objects. It is also a multilevel methodology involving micro-, meso-, and macro-level factors interfacing with each other (Shoemaker & Vos, 2009). While Lewin sought to understand the journey of food to consumers, he believed his theory was applicable across various domains.

Although the theory was initially developed from a social psychology perspective and closely aligned with what is now considered a marketing phenomenon, gatekeeping theory gained its most substantial foothold in media studies, particularly news. The gatekeeper metaphor provided early communication scholars with a framework for assessing how the selection of events occurs (White, 1950) and why some items are chosen while others are

dismissed. It also established a structure for examining processes beyond selection, such as how content is shaped, organised, positioned, and timed. Shoemaker and Vos (2009) warn that scholars can fall into traps when studying systemic fields if they do not measure each construct properly. For instance, ideology should and can be measured and delimited to avoid fallacies. In critical studies, it is frequent to see scholars implying (without data corroboration) more power to macro constructs (Herman and Chomsky, 1988 cited by Ibid., p. 148) over individual selection.

Later authors contributed to the advancement of the theory. (Gieber, 1956 cited by Ibid., p. 25) revealed the influence of routine and procedures as forces influencing decisions, proving that subjectivity in deciding what becomes news may not be as strong as previously believed. Studies at the individual level focus on gatekeepers' role, personality and thought mechanisms (Ibid., p. Part II Ch. 3). Some see gatekeepers as interpreters, while others see them as disseminators. Audiences may react differently to interpretive gatekeepers in different media or social systems. Sometimes, the study of gatekeepers tends to focus on power distribution and control issues (Pettigrew, 1972; Crombez et al., 2006; Zittrain, 2006; Siler et al., 2015).

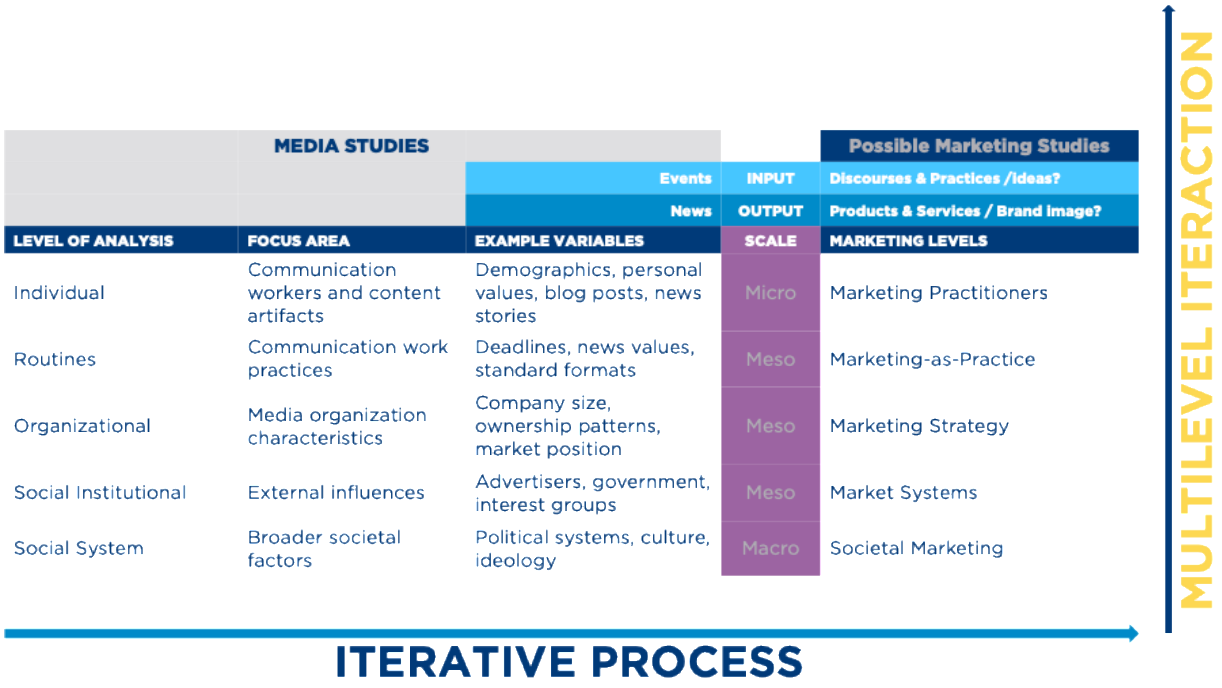
Definition and Components of Gatekeeping Theory

Building on these earlier concepts, gatekeeping processes are defined as dynamic mechanisms that extend beyond the mere selection or rejection of physical or symbolic products. They encompass these products' shaping, structuring, positioning, codification, categorisation, and timing to enhance their appeal to consumers. It maintains the essence of earlier definitions but adds symbolic and technological dimensions now affecting much of the recent marketing studies. It also refrains from defining gatekeepers a priori, as "gatekeeping is similar to the consumer decision-making process because gatekeepers are consumers, producers, and distributors of messages (Shoemaker & Vos, 2009, p. 53)."

Based on these authors, these are the key components of the theory: a) gatekeepers, actors deciding what enters or exits the system; b) gates: decision points where filtering occurs; c) sections, different stages where selection and transformation happen; d) channels: pathways through which objects (information, products, symbols) travel. It needs to be adequately updated for current marketing definitions, but it offers a good early framework upon which to work. Figure 1 presents an early framework comparing media studies, levels of analysis and how marketing

literature fits into it on the horizontal axis, while indicating the multilevel iterations on the vertical view.

Figure 4: A Framework For Gatekeeping Processes Comparing Media Studies And Marketing Levels



Although much of the gatekeeping literature originates from Media and Communication scholars, it has also developed studies in diverse fields such as finance (Roychowdhury & Srinivasan, 2019), international business (Gao et al., 2016; Gao et al., 2018), creative industries (Smits, 2016), entrepreneurship (Stevenson & Josefy, 2019), anthropology (Erickson, 1976), and politics (Crombez et al., 2006). Network gatekeeping, a more recent theory development, has seen equal interest from information science and digital business (Barzilai-Nahon, 2008). So why has so little been seen in marketing, even though it originated from a mix of consumer culture and behaviour studies? This gap may stem from its stronger historical ties to institutional and social theories, more prevalent within organisational (Hirsch, 2000; Jones & Maoret, 2018) and strategy (Schweizer, 2003). These touching points will be explored.

A significant gap in gatekeeping studies—one that marketing tools can help bridge—is the absence of multilevel, systemic research, as most focus on specific processes such as the roles of gatekeepers (decision-makers) or access barriers. Theoretically, marketing and gatekeeping

theories share key counterparts and functions, particularly in their socially constructed, systemic, and multilevel perspectives, as seen in Market System Dynamics and Consumer Culture Theory (CCT).

As a broad framework, gatekeeping allows for multiple procedures as a dynamic process influenced by various forces. For instance, brand construction is a gatekeeping process in which brand narratives travel through channels to form a symbolic product. Deciding what messages are transmitted in content creation parallels how journalism views gatekeeping. Studying gatekeeping in market access can interpret how distribution channels are controlled and how products are positioned.

References

Barzilai-Nahon, Karine (2008), "Toward a Theory of Network Gatekeeping: A Framework for Exploring Information Control," Journal of the American Society for Information Science and Technology, 59(9), 1493–1512, https://doi.org/10.1002/asi.20857.

Crombez, Christophe, Tim Groseclose, and Keith Krehbiel (2006), "Gatekeeping," The Journal of Politics, 68(2), 322–34, https://doi.org/10.1111/j.1468-2508.2006.00409.x.

Erickson, Frederick (1976), "Gatekeeping Encounters: A Social Selection Process," in Anthropology and the Public Interest, Elsevier, 111–45, https://doi.org/10.1016/b978-0-12-617650-6.50015-8.

Gao, Hongzhi, Monica Ren, and Qing Miao (2018), "Toward a Yin-Yang Balancing Perspective of Relational (Guanxi) Gatekeeping in International Exchange Relationships in China," Journal of International Marketing, 26(2), 22–42, https://doi.org/10.1509/jim.16.0131.

Gao, Hongzhi, Monica Ren, Jing Zhang, and Ruoyi Sun (2016), "Network Gatekeeping in SME Exporters' Market Entry in China," International Marketing Review, 33(2), 276–97, https://doi.org/10.1108/imr-06-2014-0191.

Hirsch, Paul M. (2000), "Cultural Industries Revisited," Organization Science, 11(3), 356–61, https://doi.org/10.1287/orsc.11.3.356.12498.

Jones, Candace and Massimo Maoret (2018), "Frontiers of Creative Industries: Exploring Structural and Categorical Dynamics," in Research in the Sociology of Organizations: Frontiers of Creative Industries: Exploring Structural and Categorical Dynamics, Emerald Publishing Limited, 1–16, https://doi.org/10.1108/s0733-558x20180000055001.

Lewin, Kurt (1951), Field Theory in Social Science; Selected Theoretical Papers., 1, ed. Dorwin Cartwright, New York: Harper & Row, https://lccn.loc.gov/51009715.

Pettigrew, Andrew M. (1972), "Information Control as a Power Resource," Sociology, 6(2), 187–204, https://doi.org/10.1177/003803857200600202.

Roychowdhury, Sugata and Suraj Srinivasan (2019), "The Role of Gatekeepers in Capital Markets," SSRN Electronic Journal, 42, https://doi.org/10.2139/ssrn.3352046.

Schweizer, T. Sophie (2003), "Managing Interactions Between Technological and Stylistic Innovation in the Media Industries," Technology Analysis & Strategic Management, 15(1), 19–41, https://doi.org/10.1080/0953732032000046033.

Shoemaker, Pamela J. and Timothy Vos (2009), Gatekeeping Theory, 1st ed., New York: Routledge, https://doi.org/10.4324/9780203931653.

Siler, Kyle, Kirby Lee, and Lisa Bero (2015), "Measuring the Effectiveness of Scientific Gatekeeping," Proceedings of the National Academy of Sciences of the United States of America, 112(2), 360–65, https://doi.org/10.1073/pnas.1418218112.

Smits, Roderik (2016), "Gatekeeping and Networking Arrangements: Dutch Distributors in the Film Distribution Business," Poetics, 58, 29–42, https://doi.org/10.1016/j.poetic.2016.08.002.

Stevenson, Regan M. and Matthew Josefy (2019), "Knocking At the Gate: The Path to Publication for Entrepreneurship Experiments Through the Lens of Gatekeeping Theory," Journal of Business Venturing, 34(2), 242–60, https://doi.org/10.1016/j.jbusvent.2018.10.008.

White, David Manning (1950), "The 'Gate Keeper': A Case Study in the Selection of News," Journalism Quarterly, 27(4), 383–90, https://doi.org/10.1177/107769905002700403.

Zittrain, Jonathan L. (2006), "A History of Online Gatekeeping," Harvard Journal of Law & Technology, 19(2), 256, https://ssrn.com/abstract=905862.

Opportunity and Exclusion: Recognition of Exclusion as a Trigger for Low-Resource Entrepreneurship in the Global South

Thiago Gomes de Almeida

Tatiana Dornelas de Oliveira Mendes

Cristina Sayuri Cortes Ouchi Dusi

Camila Braga Soares Pinto

Giovana Pedrette

Giovani Peterson Alves Mendes

Victoria Santos

Luiza Crispin Murta

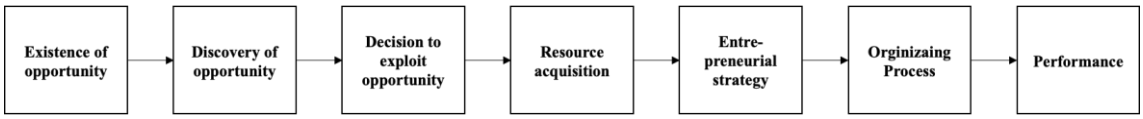
Entrepreneurship, a phenomenon largely addressed from the perspective of economic and psychological theories (Shane 2003), has received contributions over the past decades from other conceptual lenses, such as social development approaches (Fajardo et al. 2019; Sridharan et al. 2014) and market dynamics (Beninger and Francis 2021; Castilhos et al. 2016), becoming an object of investigation from the macromarketing perspective (Morrish et al. 2019). Among the theoretical interests traditionally investigated in the field of entrepreneurship, the identification of opportunities stands out (Alvarez and Barney 2007; Baron 2006; Shane 2003; Venkataraman and Shane 2000).

Shane and Venkataraman (2000) argue that opportunities arise from the interaction between changes in the economic environment and individuals' ability to recognize them. Scott Shane (2003), in his analysis of the entrepreneurial process, proposes a comprehensive model consisting of seven interconnected stages, as illustrated in Figure 1.

The first stage, the existence of opportunity, highlights that business opportunities arise from market imbalances or technological advancements, essential for entrepreneurial action. Next, the discovery of opportunity refers to an individual’s ability to identify and recognize these opportunities, influenced by factors such as prior knowledge, social networks, and perception. The decision to exploit the opportunity is when entrepreneurs choose to invest effort, resources, and time to transform the opportunity into a concrete initiative. The resource acquisition stage focuses on gathering the necessary inputs, such as financial capital, infrastructure, and skills, to enable the business. Entrepreneurial strategy involves defining how the business will compete in the market, including choices related to differentiation, segmentation, and positioning.

Organizational processes address the implementation and internal management of the business, including team structuring, decision-making processes, and task execution. Finally, the performance stage assesses the outcomes achieved by the business, both financially and in terms of social and economic impact.

Figure 1. *Entrepreneurial Process*



Source: Shane 2003

In emerging markets and among low-income entrepreneurs, research by Viswanathan et al. (2010) shows how contextual limitations shape both the perception and exploration of opportunities, requiring creativity and resilience.

Studies related to macromarketing have significantly contributed to expanding the understanding of entrepreneurship as a phenomenon linked to reducing social inequalities, alleviating poverty, and addressing market exclusion (Cova, Ivens, and Spencer 2020; Morrish et al. 2019). They provide evidence that in contexts of subsistence and low-resource entrepreneurship, social, cultural, and political factors play fundamental roles in shaping entrepreneurial initiatives, which are not addressed by conventional approaches based on economic and psychological perspectives. These aspects are particularly relevant in the Global South and emerging markets in Latin America, where social and economic exclusion dynamics shape entrepreneurs' experiences and motivations (Fajardo et al. 2019).

This paper presents initial findings from ongoing research, consisting of an ethnographic case study conducted in the Latin American context, specifically with two Brazilian subsistence and low-resource entrepreneurs who lead entrepreneurial fairs. Their original names have been replaced with pseudonyms. The preliminary results show that awareness of exclusion from the labor market and access to urban and educational structures acts as a trigger for the entrepreneurial process. This indicates that in low-income and resource-constrained contexts, the theory of opportunity identification may receive conceptual contributions and expand its explanatory capacity. Thus, this work presents a framework of the entrepreneurial process in subsistence and low-resource contexts.

The research, planned to last two years, has already collected data during the first six months of fieldwork through interviews and participant observation. Three rounds of interviews were conducted, focusing on the entrepreneurs' life stories, the details of their fairs, and their motivations to undertake business ventures. Participant observation included two ethnographic immersions at the fairs, held every two months. The first case studied was that of entrepreneur Kátia, who created the Plus Size Entrepreneurial Fair. The second case was Renata, founder of Nossa Feira, an entrepreneurial fair for low-resource women entrepreneurs and artisans. The profile of each entrepreneur can be seen in Table 1.

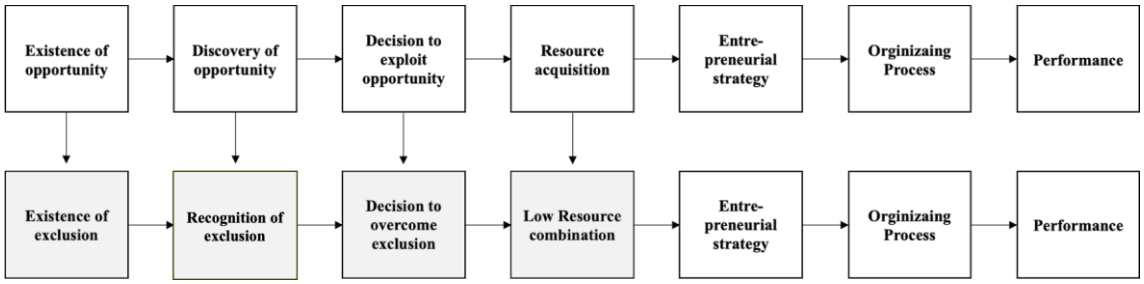
Table 1. Data Collection and Profile of Interviewees

Entrepreneur	Enterprise	Context	Data Collection
Kátia (31)	Plus Size Fair	Fair for low-resource entrepreneurs developing products and services for the plus-size market	3 In-Depth Interviews, 2 Participant Observations
Renata (38)	Our Fair	Fair for low-resource women artisans developing various types of crafts	3 In-Depth Interviews, 2 Participant Observations

Source: Authors

Four categories emerged from data analysis, directly aligned with the initial stages of Shane's (2003) entrepreneurial process and summarized in Figure 2: Existence of Exclusion (analogous to Existence of Opportunity); Recognition of Exclusion (analogous to Opportunity Identification); Decision to Overcome Exclusion (analogous to Decision to Exploit Opportunity); Combination of Low Resources (analogous to Resource Acquisition).

Figure 2. ***Framework of The Entrepreneurial Process in Subsistence and Low Resources Contexts***



Source: Authors

Kátia identifies herself as a plus-size woman, a term used in Brazil to describe people above average weight or in a state of obesity. After facing challenges entering the labor and consumer markets, recognizing that she was subject to prejudice due to her physical condition, she decided to create the Plus Size Entrepreneurial Fair. Renata turned to craftsmanship as a profession after the birth of her daughter when she realized she could not afford private daycare for full-time hours, as there were no public schools offering this schedule at the time. Renata then created Nossa Feira, a fair for low-resource female entrepreneurs focused on crafts, operating as a business platform for mother entrepreneurs in subsistence contexts.

The category 'Existence of Exclusion' in markets is identified from literature addressing social inequality in emerging countries (Henderson and Williams 2012; Pels and Kidd 2012; Sarens, Parsons, and Goulding 2019) and is directly associated with institutional voids filled through the activities of low-resource entrepreneurs and family support networks (Ge, Carnei, and Kellermanns 2019). Renata's statement highlights the existence of institutional voids related to public transportation issues, long commutes between home and work, and the need to wake up early to work, demonstrating that entrepreneurship is not just a mechanism for generating income but also for improving quality of life:

"And being able to work, as I mentioned, with the freedom of time, without having to depend on, often in big cities, sometimes it takes you two, three hours just to get to work, and being able to have the opportunity to work from home gives you a much better quality of life. You don't have to wake up at dawn to head to work. I think quality of life, whether it's good for you or not, is very personal, very relative." (Renata, 34)

The second category, **Recognition of Exclusion**, was identified from accounts showing that the trigger for the decision to undertake business ventures was not the prospect of financial gain or enrichment but rather overcoming the condition of exclusion faced when starting their projects:

"I think for most women, it's about their kids. Others face the issue of a lack of education. For some reason, they didn't study, stopped along the way, and lacked qualifications. And the jobs available to them are not good (...) being a cashier at a supermarket... I'd rather keep making my crafts and earn the same amount, you know?" (Renata, 38)

The narratives show that entrepreneurs in low-income and resource-constrained contexts become aware of their exclusion from the labor market, whether due to personal conditions such as low education or obesity (resulting in prejudice) or structural factors such as mobility and education. Upon recognizing the limitations imposed by these conditions, they identify entrepreneurship as a way to improve their quality of life.

The third category, **Decision to Overcome Exclusion**, was identified from accounts indicating the context in which the entrepreneurs decided to overcome their condition of exclusion and start a new venture to better organize their lives. The accounts show how the starting point was using skills developed over their lives, even if these were not initially intended for entrepreneurship, as Renata shares:

"If I used my salary, I'd just hand it over to the daycare. Then, talking to my husband, I realized it wasn't worth it (...) And so I started, as a consequence of my pregnancy, to make some felt crafts, small souvenirs, things like that (...) And I became more interested in this area. And as my daughter grew, I saw the need for toys and started looking for online courses on felt toys and specializing in that. With this specialization, I got more clients, received recommendations, and got involved in women's entrepreneurship events." (Renata, 38)

In Shane's (2003) original theory of the entrepreneurial process, the resource acquisition stage involves seeking sources of entrepreneurial financing, whether through bank loans, investor contributions, or even personal resources. However, our data shows that in subsistence and low-resource contexts, the process is different. Entrepreneurs use the few resources available to them to start their ventures, even if this involves improvisation or informal business practices.

"For example, this woman working with stationery products, the first time she went to JF Plus, she made several notebooks featuring plus-size women (...) I have a close acquaintance who

works with pinewood. So, she made some items aimed at plus-size bodies too, like love and glory stuff, to be appealing to that audience." (Kátia, 31)

Despite being an initial report of ongoing research with 18 more months of fieldwork ahead, this study has already identified some relevant elements that contribute social, cultural, and political insights to opportunity identification theories and the entrepreneurial process. Such elements may support a better understanding of the entrepreneurial phenomenon in emerging countries, Latin America, and the Global South as a whole. Additionally, they may inform public policies related to entrepreneurship and the reduction of social inequalities. The study will continue to be enriched with new data and validation of the identified categories but already points to the development of knowledge that may advance the theoretical field of low-resource entrepreneurship.

References

Alvarez, Sharon A., and Jay B. Barney (2007), "Discovery and Creation: Alternative Theories of Entrepreneurial Action," Strategic Entrepreneurship Journal, 1(1-2), 11-26.

Baron, Robert A. (2006), "Opportunity Recognition as Pattern Recognition: How Entrepreneurs 'Connect the Dots' to Identify New Business Opportunities," Academy of Management Perspectives, 20(1), 104-119.

Cova B, Ivens BS, Spencer R. (2020), "The ins and outs of market shaping: Exclusion as a darkside?", J Bus Res.

Gao, C., Zuzul, T., Jones, G., & Khanna, T. (2017), "Overcoming institutional voids: A reputation-based view of long-run survival", Strategic Management Journal, 38(11), 2147-2167.

Luhmann, N. (1997), "Die Gesellschaft der Gesellschaft [The society of society]", Frankfurt/Main: Suhrkamp.

Luhmann, N. (2019b), "Die Gesellschaft und ihre Organisationen [Society and its organisations]". In Lukas, E. & Tacke, V. (Eds.), Theorie organisiertes Sozialsysteme [Theory of organized social systems]. Selected texts by Niklas Luhmann (pp. 451–465). Wiesbaden: Spinger.

Sarasvathy, Saras D. (2001), "Causation and Effectuation: Toward a Theoretical Shift from Economic Inevitability to Entrepreneurial Contingency," Academy of Management Review, 26(2), 243-263.

Saren, M., Parsons, E., & Goulding, C. (2019), "Dimensions of marketplace exclusion: Representations, resistances and responses". Consumption Markets & Culture, 22(5-6), 475-485.

Shane, Scott (2003), "A General Theory of Entrepreneurship: The Individual-Opportunity Nexus", Cheltenham, UK: Edward Elgar Publishing.

Shane, Scott, and S. Venkataraman (2000), "The Promise of Entrepreneurship as a Field of Research," Academy of Management Review, 25(1), 217-226.

Viswanathan, Madhu, Jose A. Rosa, and Julie A. Ruth (2010), "Exchanges in Marketing Systems: The Case of Subsistence Consumer-Merchants in Chennai, India," Journal of Marketing, 74(3), 1-17.

Persistence against the New Means of Consumption in Japan

Masaaki Takemura

In this paper, I explore the evolution of the new means of consumption in Japan. The concept of "means of consumption," introduced by Ritzer (1999), describes the settings and structures that enable consumption. Ritzer (1999, p. 6) defines them as "the settings or structures that enable us to consume all sorts of things." These means do more than simply prompt consumption; they are structured to guide and even coerce us into it. The means of consumption can be seen in everywhere in, for instance, ballparks, universities, hospitals, museums, churches, and so on.

Additionally, Ritzer (1999) forecasted that the new means of consumption would inevitably penetrate all over the world. The new means of consumption would be prevailing shopping conditions in any country. Despite the widespread adoption of these consumption-driven structures elsewhere, traditional retail spaces and established shopping practices continue to hold significant sway in the Japanese market.

I will show the intriguing resilience of traditional retail in Japan. My research investigates why, despite the global spread of these structures, they have not fully permeated the Japanese retail landscape. This research delves into the cultural, social, and economic context of Japanese retail, analyzing how these factors have contributed to the persistence of traditional shopping experiences.

My research, and therefore in my presentation, will explore specific examples of enduring traditional retail formats and practices, such as *shotengai* (local shopping streets) and department stores with deep cultural roots, contrasting them with the characteristics of Ritzer's new means of consumption.

By analyzing the Japanese case, this study offers valuable insights into the limitations of a universal theory of consumption and highlights the crucial importance of considering local contexts when examining global trends in macromarketing. It challenges the assumption of a singular trajectory of retail evolution by economic rationality and capitalistic development.

Postcolonial Conditions Enabling Consumers' Collective Political Agency in Latin America

Marlon Dalmoro

Consumers' collective political agency (CCPA) refers to the capacity of groups—more or less organized—capacity to act towards communal goals (Sandikci and Ger 2010), ideological objectives (Kozinets and Handelman 2004), and/or identity projects (Scaraboto and Fischer 2013). CCPA operates within complex systems of interactions among market actors and institutions (Askegaard 2015) and in negotiating political views (Dalmoro and Peñaloza 2025). Previous research has described the ontology of CCPA through the features of agents' practices—such as resistance and activism, their organizing efforts to achieve consumer-driven goals (Kjeldgaard et al. 2016; Nøjgaard 2022; Weijo et al. 2018,) and internal interests and conflicts on CCPA (Chatzisasky et al. 2021).

Additionally, some studies associate CCPA with postcolonial struggles (Dalmoro and Peñaloza 2025; Izberk-Bilgin 2012; Varman and Belk 2009). For example, Varman and Belk (2009) emphasized the importance of cultural memory regarding past and present colonial experiences in collective actions to discredit foreign products and promote domestic Indian companies, thereby uniting consumers, farmers, and workers. The market and social relations that define CCPA differ in colonized contexts compared to those in former colonial powers due to the enduring legacy of subordination to colonizing nations (Quijano 2000; Varman et al. 2024). These differences also arise from transformations in traditional cultural practices and ideals (Canclini 2005), the appropriation of land, natural resources, and labor, and the role of government security forces in protecting corporate interests (Nash 2001; Sidney 2019).

Thus, considering these particularities in postcolonial struggles, we emphasize the importance of understanding the "postcolonial" not merely as a contextual backdrop or an ontology influencing consumer behavior, but also as the epistemic conditions enabling CCPA. Unlike in formerly colonizing nations, where the colonizer's position benefits consumers (Wade 2003), colonized conditions impose domination, subordination, and control over consumers, consequently affecting the reasons, conscience, and principles for their agency. Drawing on decolonial studies, we define epistemic conditions as the socially and historically constructed systems of knowledge and belief that influence how actors perceive, interpret, and act in the world (Mignolo 2011). Accordingly, in this paper, we explore Latin American postcolonial conditions as an epistemic condition that enables CCPA. For that, we propose a framework

mapping three different enabler conditions.

The first postcolonial condition enabling CCPA is ideology. It serves as an epistemic condition by mobilizing members by emphasizing nationalist historical triumphs, identity, and grievances against foreign firms for eroding social traditions (Izberk-Bilgin 2012; Varman and Belk 2009). Ideology functions as a lens through which agents develop ideas, beliefs, and values about social and market conditions (Varman et al. 2024; Wilk 2006) and plays a central role in consumer decisions, actions, and practices, influencing how individuals and groups engage in consumption and social experiences (Schmitt et al. 2022). In Latin America, market activity is deeply intertwined with historical and ongoing experiences of violence, injustice, and the loss of cultural ways of life and ideals (Jameson and Miyoshi 1998; Quijano 2000). Consequently, ideology becomes a key factor in orienting how Latin America integrates U.S. and European companies into a complex amalgam of indigenous rituals and traditions, colonial legacies, cultural dominance, and internal nationalist and modernist impulses (Canclini 1999; Martin-Barbero 1993; Quijano 2000). Thus, the postcolonial condition imbues CCPA with ideological meaning regarding consumption and market activity and diffuses such ideals across the region.

The second condition involves awareness of social, political, and economic contradictions, coupled with the desire to act to transform them. As Freire (2018) explains, agency requires moving beyond a "naïve" position, moments of conscientization inspire consumers to take collective action and create spaces for dialogue and reflection that facilitate collective engagement. Conscientization about the colonizer/colonized relationship necessitates the development of reflexive capabilities to critically analyze market relations. This process of critical reflection enables individuals to challenge and overcome hegemonic epistemic dominance and its constraints.

The third condition is cosmology, referring to the worldview or guiding principles through which people make sense of their reality and their relationship to the broader cosmos (Geertz 1973). For Taussig (2010), cosmology in Latin America encapsulates the blend of symbols, beliefs, and interests found in geographically localized narratives that depict capitalist market relations in folklore and storytelling. Particularly striking in Taussig's work is the contrast between postcolonial perceptions of the economy as demonic—disrupting social traditions and relations—and prevalent Western views portraying the market as a benevolent force for the greater good. These contrasting market cosmologies are neither relics of the past nor limited to

postcolonial contexts. They persist with complexity and nuance, shaping how consumers naturalize collective resistance, develop critical narratives, and mobilize emancipatory activities. For example, the Buen Vivir cosmology plays a significant role in shaping consumer responses and collective actions in the Andes.

By highlighting the three postcolonial conditions enabling CCPA in Latin America, we contribute to the ongoing debate on postcolonial and decolonial studies in macromarketing. First, we shed light on the conditions that help explain what drives consumers to engage with market and consumption relations from a critical perspective, particularly in resisting the persistent power imbalances in Latin America. Second, we contribute to decolonial theorization by identifying conditions that inspire consumers to participate in collective efforts to dismantle the power structures, knowledge systems, and social practices perpetuated by coloniality (Mignolo 2011; Quijano 2000). Finally, we complement Dalmoro and Peñaloza's (2025) conceptualization of CCPA by elaborating on the ideological, actors' conscience, and cosmological conditions that enable individuals and communities to act within and influence market systems while navigating sociohistorical conditions such as colonial legacies, economic inequalities, and cultural traditions. In conclusion, our framework provides a grounded perspective on postcolonial discussions for exploring CCPA in Latin America.

References

Askegaard, Søren (2015), "Consumer Culture Theory (CCT)," in *The Routledge Companion to Consumer Culture Theory*, E. C. R. Hogg, S. B. L. Arnould, and C. J. H. Smith, eds. New York: Routledge, 31-45.

Canclini, Nestor Garcia (1999), *Consumidores e cidadãos: Conflitos multiculturais da globalização* [Consumers and Citizens: Multicultural Conflicts of Globalization]. São Paulo: Editora Loyola.

Canclini, Nestor Garcia (2005), *Hybrid Cultures: Strategies for Entering and Leaving Modernity*. Minneapolis: University of Minnesota Press.

Chatzidakis, Andreas, Pauline MacLaran, and Rohit Varman (2021), "The Regeneration of Consumer Movement Solidarity," *Journal of Consumer Research*, 48(2), 289-308.

Dalmoro, Marlon and Lisa Peñaloza (2025), "Market Sensemaking for Consumers' Collective Political Agency," *Journal of Consumer Research*, advance online publication.

Freire, Paulo (2018), *Educação e conscientização: Caminhos para a liberdade* [Education and Awareness: Paths to Freedom]. Rio de Janeiro: Paz e Terra.

Geertz, Clifford (1973), *The Interpretation of Cultures: Selected Essays*. New York: Basic Books.

Izberk-Bilgin, Elif (2012), "Infidel Brands: Unveiling Alternative Meanings of Global Brands at the Nexus of Globalization, Consumer Culture, and Islamism," *Journal of Consumer Research*, 39(4), 663-87.

Jameson, Fredric and Masao Miyoshi (1998), *The Cultures of Globalization*. Durham: Duke University Press.

Kjeldgaard, Dorte, Søren Askegaard, Jørgen Ørstrup Rasmussen, and Poul Østergaard (2016), "Consumers' Collective Action in Market System Dynamics: A Case of Beer," *Marketing Theory*, 17(1), 95-117.

Kozinets, Robert V. and Jay M. Handelman (2004), "Adversaries of Consumption: Consumer Movements, Activism, and Ideology," *Journal of Consumer Research*, 31(3), 691-704.

Martin-Barbero, Jesús (1993), *Communication, Culture, and Hegemony: From the Media to Mediations*. Newbury Park, CA: Sage.

Mignolo, Walter D. (2011), *The Darker Side of Western Modernity: Global Futures, Decolonial Options*. Durham: Duke University Press.

Nash, June C. (2001), *Mayan Visions: The Quest for Autonomy in an Age of Globalization*. New York: Routledge.

Nøjgaard, Mikkel (2022), "The Value-Translation Model of Consumer Activism: How Consumer Watchdog Organizations Change Markets," *Journal of Consumer Research*, 49(6), 967-86.

Quijano, Aníbal (2000), *Coloniality of Power, Eurocentrism and Latin America*. Durham: Duke University Press.

Sandikci, Özlem and Güliz Ger (2010), "Veiling in Style: How Does a Stigmatized Practice Become Fashionable?" *Journal of Consumer Research*, 37(1), 15-36.

Scaraboto, Daiane and Eileen Fischer (2013), "Frustrated Fatshionistas: An Institutional Theory Perspective on Consumer Quests for Greater Choice in Mainstream Markets," *Journal of Consumer Research*, 39(6), 1234-57.

Schmitt, Jonathan, Amanda M. Mirabito, A. Padmavathi, and John D. Williams (2022), "Consumption Ideology," *Journal of Consumer Research*, 49(1), 74-97.

Sidney, Maristela (2019), *Neo-extractivism in Latin America: Socio-environmental Conflicts, the*

Territorial Turn, and New Political Narratives. Cambridge: Cambridge University Press.

Taussig, Michael T. (2010), *The Devil and Commodity Fetishism in South America*. Chapel Hill: University of North Carolina Press.

Varman, Rohit and Russell W. Belk (2009), "Nationalism and Ideology in an Anti-Consumption Movement," *Journal of Consumer Research*, 36(4), 877-89.

Varman, Rohit, Russell W. Belk, and Hari Sreekumar (2023), "Post-Colonial Consumer Respect and the Framing of Neocolonial Consumption in Advertising," *Journal of Consumer Research*, 50(3), 481-500.

Wade, Robert H. (2003), "The Invisible Hand of the American Empire," *Ethics and International Affairs*, 17(2), 77-88.

Weijo, Henri A., Diane M. Martin, and Eric J. Arnould (2018), "Consumer Movements and Collective Creativity: The Case of Restaurant Day," *Journal of Consumer Research*, 45(2), 251-74.

Wilk, Richard (2006), *Home Cooking in the Global Village*. London: Berg.

Profane-Sacred Duality in Public Goods: Consumers Sacralised a Culturally Ingrained Consumption Practice

Elisa Priori de Deus

Leticia Moreira Casotti

Ana Raquel Coelho Rocha

In a context of intense change such as the COVID-19 pandemic, the only way to restore everyday consumer practices would be to develop a vaccine. Even though vaccination is a public good and part of Brazilian culture, consumers face a difficult path to receive preventive doses of the COVID-19 virus. Our interpretive research explores how a group of older people have transformed the meaning of vaccine consumption into a sacred consumption that has no exchange value and is not available in everyday life. Data was collected from various sources to understand this phenomenon: interviews and consumer reports, mass media reports, and posts on social networks such as Instagram and WhatsApp. The results suggest that consumers have transformed profane consumption into sacred consumption. In order to sacralise vaccine consumption, consumers have created unprecedented rituals in the history of vaccination. The study suggests the exclusive sacralisation of profane consumption due to the specific and emergency context, such as the pandemic, with individual and collective barriers to consumption.

Keywords: sacred consumption; duality; older consumers; public goods; COVID-19.

Introduction

The COVID-19 pandemic was a cataclysmic event that has resulted in millions of lives lost (Pradhan, 2022). It changed how we understand public health, economic activity, and individual choices, such as vaccine acceptance, avoidance, and hesitation (Pereira et al., 2021). Brazil has a history of engaging in vaccination campaigns. Since 1975, Brazil's Immunization National Program has ensured the universal and free distribution of vaccines to all Brazilians, especially children and older people (Hochman 2011). Brazilians declare vaccines part of Brazilian culture, resulting in an "inclusive biomedical citizenship" (Hochman 2011, p. 377). However, during the COVID-19 pandemic, Brazilians watched a broad discussion about how vaccine rejection could impact the effort to end or reduce the virus contamination. The older Brazilian people were the first group to be vaccinated. They created new meanings to this ordinary consumption (vaccine) through vaccination to celebrate hope and face denialism. The new ritual (Rook 1985), during the COVID-

19 vaccination, transformed this profane consumption into a sacred consumption (Belk et al. 1989).

The notion that a product or service is sacred to a person implies, amongst other things, that consuming such a thing nurtures a feeling of happiness and satisfaction in that individual. Thus, marketers benefit from influencing consumers to perceive the consumption practices associated with the brands they represent as not profane, that is, not ordinary (Schindler & Minton 2022). Since Belk et al.'s seminal work (1989), scholars have investigated sacred consumption in phenomena as diverse as pet ownership (Hill et al. 2008) and golf (McGinnis et al. 2012). Scholars have focused on private consumer goods to analyse how consumers transform the profane into the sacred (Belk et al., 1989; Hill et al. 2008; McGinnis et al., 2012; Newman et al. 2011; Tandy Chalmers et al. 2008; Epp & Price 2008). However, researchers have observed little sacralisation of public goods, such as public health or public education, a national museum or theatre, a national river or forest. Public goods are by nature common, owned by and for all, and their constitution lacks one of the important features for sacralisation, the lack of access by many people (Belk et al., 1989). In this sense, examining the contextual circumstances under which public goods, considered everyday consumption habits, become sacred is important.

Further, properties those authors utilised to characterise the concept of sacredness, such as *contagion* (Newman et al. 2011), *objectification* (Tandy Chalmers et al. 2008), and *ritual* (Epp & Price 2008), have been studied to a greater or lesser extent during the same period. In recent work, Schindler and Minton (2022) suggest the existence of an additional property that concerns each individual's ability to perceive something as sacred and profane: duality simultaneously. Such conceptualisation indicates that individuals may experience the sacredness of everyday consumption or public goods practices when in the presence of specific elements.

The COVID-19 pandemic has transformed previously unimaginable ways to hold religious, spiritual, and sacred celebrations. Technology has been essential in reviving rituals, including religious and spiritual celebrations. Homes have become spaces for religious and spiritual celebration through technologies and the asynchronous and synchronous communication of religious rituals and ceremonies (Bryson et al. 2020; Kapoor et al. 2022). Institutions use technology to maintain their traditional celebrations, services, and rituals that organise the stages of life and give meaning to specific occasions, such as funerals, weddings, and Christmas and Easter (Campbell & Sheldon 2021).

This article aims to shed light on the duality of the sacred-profane dimension in many consumer practices from older consumers. Older consumers have been at the forefront of the sacralisation of consumption. The re-signification of consumption can transform a product or service into something profane and sacred. Along these lines, our empirical effort, as described below, is to determine how older people design a new ritual non-institutionalized for vaccine shots using the technologies. We seek to understand what made the ordinary act of consumption of receiving a vaccine shot sacred from the perspective of some people (Ozanne & Appau,2022) who lived through a cataclysmic pandemic. For the other one, the shot was only a shot or had malefic meanings (Pradhan, 2022).

This interpretive study helps fill the abovementioned gap by investigating the contours of the sacralisation of public goods from profane to sacred consumption in extreme circumstances. For this, we address the following question: How can public goods be made sacred? For that, we conducted several interviews and analysed social media content to study older people's consumption of vaccines during the COVID-19 pandemic in developing countries. We made this phenomenon our research object due to its significance in everyone's lives. Such relevance makes the properties attributed to the notion of sacredness more apparent within the cultural texts (Hirschman et al. 1998) produced by consumers and within the interviews we did. In addition, the global aspect of the COVID-19 pandemic increases the likelihood that the average reader will capture the nuances of our hermeneutic effort.

Our findings suggest that many older people had a profane-sacred experience of vaccination, an act of consumption that is part of daily life in countries such as Brazil, which is the context of our empirical embarkation. Accordingly, we consider it safe to claim that the COVID-19 pandemic revealed the duality within the practice of receiving a vaccine shot. In many ways, such an event was experienced as profane consumption, as the dynamics were similar to those utilised by the populace during regular times. However, our research revealed that the gravity of the situation made elements not typically associated with that consumption practice, such as media messages and political debate, bestow a sacred quality to it. Such a condition translated into older consumer attitudes directly connected to several sacredness properties, including without being limited to ritual and contagion.

Along the lines above, this article makes two contributions to consumer studies. The first contribution is to show how consumers sacralise public goods. Our research provides dense

descriptions of a consumer practice experienced, at least momentarily, as both profane and sacred. We show that during emergencies, the work of consumers in social media and the messages conveyed by mainstream media can trigger the duality of an ordinary product or service and thus evoke the perception of sacredness in an increasing number of consumers. Indeed, the role of social media in the sacralisation of profane consumption into sacred consumption, especially public goods, is becoming increasingly important. Extreme situations transform traditional practices by incorporating new elements and transforming their meanings, even temporarily. The second contribution lies in the protagonism of older people leading a vaccination campaign for the entire population, confronting negationism and ageist discourses. Older people occupied spaces that had not previously been considered for them, such as social media and mainstream campaigns, demonstrating the importance of vaccination for everyone and transforming a public good into a sacred one in the extreme moment.

In the following, we review some of the literature on sacred consumption to set the foundation for the empirical study we present subsequently. Then, we contextually describe the phenomenon of COVID-19 vaccination in Brazil. Next, empirical procedures. After that, we move on to explain our research's interpretive findings. A brief discussion of the results closes the article.

Sacred Consumption

Sacred as something separate from ordinary life (Turner 1969). This status is attributed to objects, days and people in Western religions. In contrast, in non-Western religions, nature or animals are the entities usually ascribed to the quality of the sacred. Such a notion leads individuals to believe in the existence of something more powerful than human beings and instils a desire to look for ways to transcend the ordinary world (Belk et al. 1989). In consumer studies, the sacred is attributed to objects or consumer experiences that make life more "meaningful, powerful, and extraordinary" than the self (Belk et al. 1989, p. 13). This implies the attribution of new meanings distinct from mundane objects and experiences. It also manifests in varying intensity, depending on the feeling these consumer objects evoke (Belk et al. 1989).

Belk et al. (1989), in their seminal studies on sacred consumption, described twelve properties of sacredness associated with consuming products or services. The properties are: 1) how sacredness comes and goes: hierophany, contagion and opposition to profane; 2) consequences of sacredness: kratophony, ecstasy, flow and commitment; 3) how sacredness is

incorporated: objectification, ritual and sacrifice; 4) how sacredness is incorporated into the whole social environment: narratives, mystery and communitas. Schindler and Minton (2022) extend the properties of Belk et al. (1989) by introducing a new property based on the experience of sacredness: duality. Duality is a property of sacredness in people's experience and is related to human perception. People can perceive the experience differently depending on the human context and cultural background (Schindler & Milton 2022).

Some scholars focus on embodying the sacred attributes- sacrifice, objectification and ritual (Tandy Chalmers et al. 2008; Epp & Price 2008). Sacrifice in the conquest of the object or time of consumption is one of the characteristics that lead to the transformation of the meaning of consumption, moving it from the state of the profane to the state of the sacred (Miller 1998). Consumption objects exclusive or accessible to only a few consumers become 'objects of desire' (Belk, Ger & Askegaard 2003, p. 326) or sacred (Belk et al. 1989; Miller 1998). The inaccessibility of some consumer goods transforms their meanings (Bartmanski & Woodward, 2018). We believe that consumer studies can deepen our understanding of how specific elements arising from an extreme moment transform the meanings of previously accessible and universal objects into inaccessible ones that require sacrifice to achieve.

Sacralisation can be ritualised through ceremonies or consumption practices. Rituals serve as a source of relief and resistance from the pressures and impositions of everyday practices by materialising the sacred, giving value and power to objects and time (Belk et al. 1989). The consumption of sacralised objects in rituals establishes social values (Belcher, 2020) that help consumers organise their own 'world of consumption' (Belk et al. 1989, p. 14). Rituals can confer additional social benefits, such as opportunities for community experience and personal transformation (Fernandez et al. 2011). During the COVID-19 pandemic, rituals were revised for safety and health (Kapoor et al. 2022), especially communal rituals, like mass, Christmas holidays, and wedding ceremonies.

However, conferring sacredness on consumption does not guarantee its incorporation as sacred into the culture. In other words, the object acquires the meaning of sacred at one moment but can return to the category of profane (Bartmanski & Woodward 2018) when individuals decide that it can be exchanged again. This alternation of social meanings occurs because objects accumulate stories throughout their existence, continually transforming their meaning for and between the community in which they are inserted. Thus, the collective meaning of objects can

move between the sacred and the profane depending on the social context (Belk et al. 1989; Bartmanski & Woodward 2018; Brondino-Pompeo 2012). Although there is a large body of literature on sacredness, few studies describe situations where ordinary consumption is sometimes momentarily experienced as sacred.

Our study explores a movement of re-signification of consumption that was considered profane until a health emergency. The difficulty of access to vaccine consumption contributes to changing its meaning from profane to sacred consumption. It explores the perspective of the consumer, who lives in a specific context (Ozanne & Appau 2019), and catastrophic events such as the COVID-19 pandemic (Pradhan 2022) transformed the meaning of the consumption of an object, the vaccine for COVID-19.

Methodology

This interpretative study (Hirschman 1986) aims to understand how public goods become sacralised by introducing specific elements resulting from an extreme moment. First, we present the research context, highlighting some specific cultural elements that have transformed the meaning of vaccine consumption. We then describe the data collection and analysis.

Context: COVID-19 Vaccination in a Developing Country

The COVID-19 pandemic transformed social habits through protocols and recommendations such as staying at home, maintaining social distancing, wearing masks, and using hygiene practices. Also, it has accelerated the development of vaccines, resulting in COVID-19 vaccines reaching the market much faster than others in the past (Machingaidze & Wiysonge 2021).

Due to reasons beyond the scope of this article, Brazilian government leaders initially engaged in denialist narratives regarding the existence of the pandemic. Then, they started to discredit vaccines, using religious motives to exert influence (Monari et al. 2021). For that, they leverage the notion proposed by Greenberger (2017) that "anti-vaccine" individuals may see immunisation as an act of rebellion against God.

Such leadership forced Brazilians to endure two years of the pandemic with many conflicts over the information available through official channels. To mitigate this, the scientific community and the general public, with the help of some mainstream media and digital platforms, fought misinformation by defending prevention practices and disseminating the safety of vaccination and the WHO (World Health Organization) guidelines. An example of an initiative was the

partnership between some mass media outlets to show updated data on the COVID-19 pandemic: G1, O Globo, Extra, Estadão, Folha, and UOL. These organisations collected data directly from thousands of health departments nationwide and jointly released the daily numbers of the pandemic in Brazil.

The history of Brazilians with vaccines demonstrates that this consumption practice is ingrained in Brazilian culture, particularly regarding the health of children and older people. The public health system has recorded satisfactory vaccination coverage rates in nationwide campaigns. Indeed, available data demonstrate the existence of "a public offer of a broad package of immunisers and good coverage of the population in vaccination campaigns" (Hochman 2011, p. 377). Further, the high number of those campaigns experienced by Brazilians lends this consumption practice to the characteristics of ordinary activity, that is, everyday life. Brazilians frequently get vaccinated when attending a family gathering or meeting with friends. There are numerous vaccination sites in the public health system (SUS), and historically, the mainstream media has made reliable information available.

As one might expect, the tensions between the pandemic's transformations in people's lives, the unprecedentedness of the COVID-19 vaccine as a product, the contradictory and often inexplicable attitudes of the political leadership, and the cultural footprint of the vaccination habit all played a role in how Brazilians perceived vaccination practice during the pandemic.

Data Collection and Analyses

Data was collected from different fronts of contact with the consumer to understand the phenomenon from their perspective.

Table 1. Data Collection

Data	Description	Predominant Contributions
Deep Interview	Thirty older consumers pro-vaccine. In January 2022, a group of students from the UFRJ undergraduate lecture interviewed older people. The interviewees were women	The interviews and the reports are sources that contributed to understanding the

	and men 60 years old or more than this. Older people live in different states in Brazil. Although all of them assured me that they would not mind using their real names, we decided to use fictitious names to avoid any embarrassment for the participants. In addition, the project was approved by the institutional ethics committee of UFRJ for consultation: CAAE no: 83047524.1.0000.5582.	phenomenon through the consumer's speech.
Narratives	Eleven narratives from pro-vaccine older women in a Whatsapp group of one of the authors. The reports describe the participants' experience in the pandemic and their vaccination experience. All the names used in the paper are fiction. Although all of them assured me that they would not mind using their real names, we decided to use fictitious names to avoid any embarrassment for the participants. In addition, the project was approved by the institutional ethics committee of UFRJ for consultation: CAAE no: 83047524.1.0000.5582.	
Reports	Reports results of monitoring the Whatsapp group of the family of one of the authors. This group proved essential for the research because of the 15 members, 07 participants are over 60 years old and pro-vaccine. The monitoring of this group took place between	

	February and November 2021. All the names used in the paper are fiction.	
Instagram posting.	Instagram postings using the hashtag #vacinasim between January 18 and December 2021. The hashtag #vacinasim has 189,000 publications of photos and texts by Brazilians vaccinated against COVID-19. For research, among so many posts using the hashtag, it was decided to analyse 01 publication by older people per Brazilian state. Thus, 27 postings with photos and captions of the older people were analysed. No one participant had their profile identified. In addition, the project was approved by the institutional ethics committee of UFRJ for consultation: CAAE no: 83047524.1.0000.5582.	Instagram posts and cultural texts contributed to understanding representations about vaccination in the personal profiles of older people on social networks and how they were portrayed in mass media reports.
The Cultural Texts	We analysed 27 mass media reports from January to December 2021. The reports brought photos and texts about the arrival and distribution of vaccines or the first vaccinated (older people) in each Brazilian state.	

Source: by the authors.

The data was coded and categorised (Saldaña 2009; Linneberg & Korsgaard 2019). The Atlas TI 9 software supported the analysis, generating 189 codes inductively. Next, the codes underwent a second cycle of abductive study, giving birth to a group of subcategories (Linneberg & Korsgaard 2019). Finally, the third cycle of the abductive analysis results in one principal category: *The older consumer in the sacralisation process*. According to the findings, vaccination during the pandemic has gained the dual status of profane-sacred.

Main Findings

This study identified critical and specific elements of the sacralisation of vaccine consumption within the context of the COVID-19 pandemic. These facets are analysed individually below, despite combining and complementing one another to create the sacred experience of the vaccine.

The older consumer in the sacralisation process

Sacrifice to face denialism in the Process of Sacralization.

The first information about developing a vaccine emerged amid heated debate during the first year of the COVID-19 pandemic. Vaccine proponents defended them by claiming they would give people hope that viruses could be stopped or reduced. On the other hand, anti-vaccine movements spread messages of distrust, and vaccine rejections increased despite the pandemic's unique characteristics (Pereira et al. 2021).

The denialist discourse led by the President of the Republic appeared to reinforce vaccine sacralisation in Brazil. Official narratives understated the pandemic's lethality in the first year. We noted various Presidents' statements referring to the disease as older people's disease. Only older people will die due to COVID-19. For others, it is only a “little flu”, implying that strong and healthy individuals should not be concerned about the pandemic or stating that "the destructive power of this virus is oversized" (March 2020)[13]. It was also possible to identify other types of President's anti-vaccine statements, shedding doubt on the vaccines recently developed, although respected international and national organisations had already approved them.

The President, in an ironic tone, suggested that the vaccine could cause adverse reactions: "If you get vaccinated and turn into an alligator, I have nothing to do with it"[14] (December 2020) (Monari et al. 2021). As one interviewee put it, people were taken aback by the government's speeches: "Living this pandemic in the middle of a country with such unprepared, irresponsible rulers has been very difficult" (Jandira, 61, Rio de Janeiro)—furthermore, false information added to anti-vaccine statements spread primarily through social media. According to Vivian (63, Rio de Janeiro), "I was just scared by the things I read in those WhatsApp groups (about vaccines)," where certain manufacturers were disqualified to the detriment of others.

If denialism hampered the population's access to the vaccine, it also approximated vaccination as something akin to a sacrifice to be faced with defending its consumption (Miller

[13] (2 Anos de Covid: Relembre 30 Frases de Bolsonaro Sobre Pandemia, 2022).
[14] (2 Anos de Covid: Relembre 30 Frases de Bolsonaro Sobre Pandemia, 2022).

1998). Sacrifice was made synonymous with access to the vaccine. As a result, the media depicted massive lines of older adults waiting to receive vaccine doses due to Federal government acquisition and distribution issues. Vaccine consumption in the first months was almost entirely limited to older people.

Figure 1. The older people are waiting for the Covid-19 vaccine shot.



Source: (The older person aged 77 to 79 faced up to two hours in line to get the COVID-19 vaccine in São Paulo, 2021).

Older people faced the denialism discourse, went to the queue, and received their shot. They waited hours and hours for their shot, showing that there are many older people and that they deserve respect and to be alive.

New consumer rituals

Vaccine consumption has traditionally been considered routine and part of the culture in Brazil, with no need for preparation or ritualistic practices (Rook 1985). However, our informants reveal a new meaning construction in the vaccination process, which appears to have released its duality (Schindler & Minton 2022), establishing a new "cultural order" (McCracken, 1986 p. 78), albeit transitory in the pandemic context. Older people, aided by mainstream media, established revisited rituals (Kapoor et al. 2022) such as waiting, planning, vaccine day, and the post-vaccination period:

- *Waiting:* This entails following the vaccination calendar daily and monitoring the age group's progress. This waiting period was accompanied by a range of emotions, as described by Ana (61, RJ): "The wait for the vaccine was agonising. I wish I were 70 or 80 [years old] soon so I would not have to check the vaccination schedule daily. I wanted to dash to the hospital to get the redeeming medicine (vaccine)."

Social media, especially WhatsApp, family, and friends groups, always share possible calendar changes. We clipped a dialogue from a WhatsApp family group:

_ Hi, my handsome brother. Thank God your day arrived.

_ Yes, tomorrow will be Leda's [sister-in-law] day, and soon it will be you.

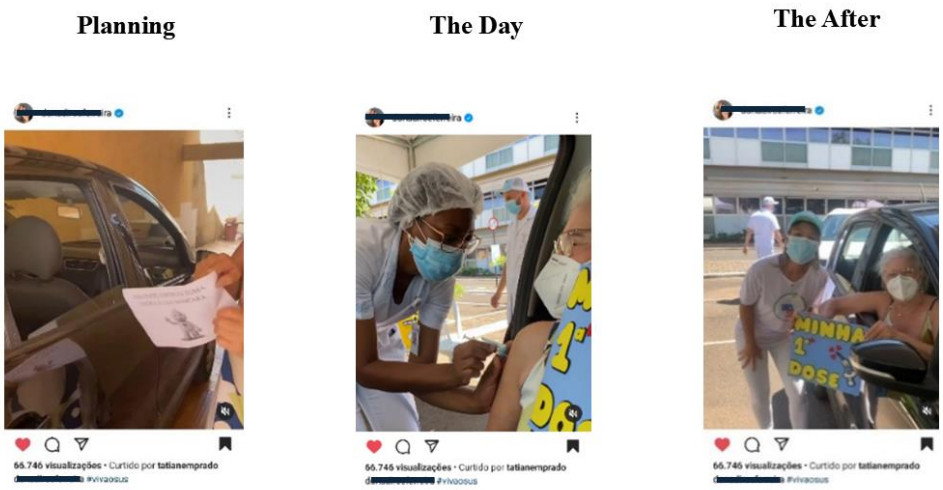
_ It will take a few days, but I will get there.

_ Do not be anxious. Your time will come.

Some testimonials suggested the vaccination experience as a "quasi-hedonic" consumption ritual. Vaccines became an expression of various ritual actions (Rook 1985).

- *Planning:* As the day approached, special preparations were made, such as selecting clothes to wear that day, creating posters, considering and selecting companions, and planning travel to the vaccination site. Carmem (78) elaborates: "After a year at home with just my husband [...] I began considering what I would wear and how I would look on the vaccination day. The first Uber driver in a year to be vaccinated."
- *The Day:* When the long-awaited vaccine day arrived, the person was ready to begin the sacred "mini ritual" of waiting in a long line or inside the car at the drive-thru, as they explain: "My oldest son brought us in his car"; "we (older man, his daughter, and granddaughter) waited our moment to come at the drive-thru." Older used to photograph the vaccination and send it to family and friends. Some seniors also took photos with the medical team at the location where they received the vaccine to show their importance in the process.
- *The After:* Following the vaccination, older people shared photos of the vaccine moment or the vaccination receipt on various social media platforms. They wanted to demonstrate and validate their involvement in the collective pact (Hochman 2011) against Covid-19.

Figure 2. Phases of the vaccine ritual created by the elderly for the COVID-19 vaccine: planning, vaccine day, and post-vaccination.



Source: Older woman's Instagram post.

Legend: An older woman published her ritual to vaccination on her Instagram profile.

To face COVID-19, older people developed a kind of grooming ritual (McCracken 1986), and the shared photos demonstrated a collective pact. The vaccination card began to be displayed as a trophy or graduation diploma to family members and on social media. With vaccination, older people, previously the most vulnerable to Covid-19, became the victorious group. Jandira (61, RJ) describes how she materialised the "divine" conquest event: "All the moments [of the vaccination] were filmed, photographed, and shared."

Figure 3. Photos of vaccinated older people were disseminated through social media platforms.



Source: Instagram Profile posts

Legend: Older people's photos posted on social media in 2021.

Some older people formed a group of vaccine supporters and devotees, creating a ritual that materialised the sacred (Belk et al. 1989) (Figure 03). Regardless of whether these were temporary and contextual changes, the fact is that older people have occupied an unusually prominent position since the beginning of vaccination. According to Lourdes (63, RJ): "You see that we [older people] were followed by younger groups defending vaccines and protesting against crazy politicians on Instagram." There is something unique about the older people´s protagonism in transforming vaccine meanings and practices.

Older people in mainstream media promote widespread vaccination.

The mainstream media was the principal influenciadores da vacinação (Kapoor et al. 2022). They and seniors demand that vaccines be extended to all Brazilians. Several campaigns led by the media and local, state, and municipal governments were identified. Figure 03 shows images of the "Yes vaccine" and "A good vaccine is a vaccine in the arm" campaigns, which appeared on some digital platforms and TV.

Figure 4. Posts using #vivaosus on Instagram.



Legend: Presenter Astrid Fontenelle (61 years old) and older people from Uberlândia were encouraged to take the vaccine available at the health unit.

Despite the distrust generated by various anti-vaccine statements, a segment of the citizenry, aided by the media, shifted the meaning associated with vaccines (McCracken 1984). Vaccines were no longer a traditionally profane and ordinary form of consumption. They gained a simultaneous sacred value as older people contributed to acquiring more vaccines for the general population.

COVID-19 vaccination also fostered a sense of community (Cova et al. 2018), which has been linked to sacralisation processes (Belk et al. 1989): "a great victory for me and all those who are up to date on their vaccination schedule" (Orlando, 64, RJ). Immunisation appeared to have become an unusual "object of desire" (Belk et al. 2003, p. 7) with no financial counterpart. It was subjected to a central control that determined that older people were at the top of the priority list. Such a position reversed young people's traditional role in most consumer categories. Following the classification and stigmatisation of older people as a "risk group," this priority status gave the population over 60 years of age a place of importance and exclusivity, allowing them to access a consumption practice made available for a select few only. This group of people over 60 years old becomes the envy of the younger generations. They were the "chosen ones" blessed with the sacred (Bartmanski & Woodward 2018) access to vaccine protection. Everyone wanted the immunisation that would bring them back to pre-pandemic daily life. Instead of the kratophony observed by Belk et al. (1989), everybody wished to consume the vaccine, but for that, people had to respect an age hierarchy determined by science. Older people used the vaccines to open the sacred portal that led to the recovery of freedom, autonomy, and identity lost when receiving the "redeeming" dose (Ana, 61, Rio de Janeiro).

In Brazil, vaccination had a unique political discourse. Like other studies, Brazil experienced personal responsibility, discipline, and control as moral meanings and judgments (Kristensen et al. 2010). However, during the pandemic, vaccination gave rise to a polarised discourse between pro- and anti-vaccines. The vaccine was an agreement between the State and the population to maintain well-being. However, during the pandemic, it took on the air of a discourse of individual responsibility and autonomy over their health. Older people and mainstream media took the role of facing denialism and anti-vaccine discourses for all people who received their shot.

New meanings of vaccine consumption: Divine and Science United

In Brazilian culture, taking care of health is the responsibility of science, but to some degree, there is divine help (Santos et al. 2014). There is a link between faith and medicine when Brazilians need treatment for an illness (Santos et al. 2014). With COVID-19, this relationship gets confirmed when we identify Brazilians thanking "God" for the fact that science has developed vaccines. It was possible to observe in the data we collected several greetings to science and the health structure necessary for the advances in science, such as the public health system (SUS), the national immunisation program (PNI), and the various health professionals. This structure makes it possible to live the almost divine experience of vaccination. Older people groups united in its manifestations. The health system originated from science and God: "Viva O SUS!" "I thank God and the SUS," "Vaccine is a blessing," "Thank God, we are immunised." The vaccine, a traditionally profane consumption, symbolically connected itself to the sacred of "faith" (Belk et al. 1989).

Older people resigned vaccine consumption as a sacred moment (Belk et al. 1989), resembling a victory or conquest after a trial period. The posts and statements bear similarities with emotions experienced by the achievements of a sports group that had been victorious (Scussel, 2021): "It is like you have won the title [of a football championship] (Orlando, 64 years old, RJ). Jandira describes the emotion of the "best moment" of the pandemic:

(The vaccination) Best moment in the entire pandemic. Seeing my 86-year-old mother being vaccinated three times. The day of my first dose was very emotional. You cannot get there without thinking about all the people you love and those you did not know who could be alive if we had this vaccine earlier (Jandira, 61 years old, Rio de Janeiro).

Older people found in the vaccine a consumption capable of saving them from death, as stated by Gabriel: "The perspective (of receiving the vaccine) is to be saved" (60 years old, Rio de Janeiro).

Profane consumption gained a new meaning for some consumers, albeit temporarily, into a collective, sacred. The COVID-19 vaccination context united science and faith in the same objective (Kapoor et al. 2022). Older people led the union of science and faith by thanking God that science created the vaccine that made it possible to return to everyday life. Historically, science and faith do not go together; one is the opposite. However, COVID-19 vaccination showed us that in cultures steeped in religions, such as Brazil, and experiencing contextual crises, it is

possible to unite the two for the common objective - the vaccination of the entire population. Getting vaccinated was a profane, non-hedonic, and culturally naturalised ritual. However, the strong impact of the pandemic context transformed the experience of the sacred (Shindler & Milton 2022).

The COVID-19 pandemic has brought specific elements that have allowed the sacralisation of a public good combined. These elements acted as mechanisms for the transition of meaning, albeit temporarily, transforming what is institutionalised as a standard or profane good into something sacred. None of these elements alone would have led to the sacralisation of the vaccine. Nevertheless, by acting together in a unique cultural context experienced by all Brazilians, but especially by older consumers, they enabled and sustained the sacralisation of a public good consumed individually for the collective good. The research data illustrate the sacralisation of the vaccine through the interaction of several specific elements (see Table 2).

Table 2. Elements that promoted the sacralisation of the public good.

Profane Character	**Elements**	**Properties of the Sacred in Context**
Profane Consumption	Specific Elements – COVID-19 pandemic	Duality
Universal Access	Denialism and Ageism	Sacrifice
	Polarised discourse between pro- and anti-vaccines	Mystery
Common Consumption	Shot Vaccination	Objetification
	Preparing to vaccinate	Revisited Ritual
Ageism	Sharing on social media	Grooming Ritual
	Older people in the mainstream leading the campaign to get everyone vaccinated.	Myts - “Older people were the chosen ones.”

Science vs Faith	Brazil's cultural	Hierophany - Divine experience of vaccination

Source by the authors.

As a public good, vaccines are universally accessible to the entire population, especially the elderly and children. During the pandemic, denial of the seriousness of the disease, combined with social ethos, led to delays in the purchase and distribution of vaccines. The elderly faced long waits for their turn to be vaccinated and had to sacrifice to consume the vaccine. Universal access was also destabilised by the polarised discourses of pro- and anti-vaccination ideologies among the population, which resulted in many people deciding to delay or refuse vaccination. While on the one hand, there was a discourse of faith in science and the vaccine culture, on the other hand, the speed with which vaccines were developed raised many questions, with an air of mystery about production and side effects.

The public good is what is consumed in common, i.e. what everyone has access to. The vaccine is available in all National Health System (SUS) health units as a public good. The shortage of vaccines during the COVID-19 pandemic led to the objectification of each dose. The elderly received each dose as if it were the Holy Grail that would bring them out of isolation and allow them to return to life. In order to receive the doses, they revisited rituals, creating a ritual for a previously routine consumption and preparing their clothes and arms for each dose.

They celebrated each dose they received and shared it on social media as if it were the final step in the cleansing ritual. They led a ritual that was repeated by the young people when it was their turn to receive their doses. Sharing the photos marked a collective pact (Hochman 2011) that everyone was doing their part to end the pandemic and an invitation to those who were hesitant to get vaccinated. Older people led the way on social and traditional media. They spearheaded campaigns to reduce vaccine hesitancy and demand that the government make it available.

Final Discussion

In a context of uncertainty, such as the COVID-19 pandemic, the vaccine has become a path to hope and life. However, the vaccine experience has been accompanied by obstacles, such as denialist speeches worldwide and in Brazil, led by the President and his representatives. The barriers seem to have created forces in opposite directions. The path to the vaccine took on elements of struggle, sacrifice and sacralisation. Our research sought to understand how public

goods can be sacralised. The pandemic context brought specific elements (Shindler & Milton 2022) that transformed the meanings of the vaccine, a public good, for groups of older people who were initially stigmatised as a 'risk group'.

Older consumer groups created almost hedonic rituals around vaccination, such as choosing unique clothes and accessories for the day of vaccination and photographing and sharing the record of receiving the vaccine on social media, something that had not been done before. Vaccination was a profane, non-hedonic and culturally naturalised ritual. The strong impact of the pandemic context transformed it, albeit temporarily, into a collective and sacred ritual. Different emotions were associated with consuming vaccines, such as 'salvation', 'victory', and 'blessing'. Victory', 'blessing' and 'hope'. In the face of the pandemic's high level of uncertainty, the consumer practice of receiving a vaccine has become the path that leads to the promised land of health and life.

Our research also helps consumer studies connect more with older consumers who have extended their consumption practices into the digital world. Our research shows how a group of pro-vaccine older people led a digital movement that reverberated into the offline world, which we refer to here as a process of sacralisation. This movement positively affected subsequent age groups, shedding light on how to engage with older people in consuming different goods and services.

Our investigation sought to ascertain how the elements of this emergency accentuated the sacred nature of this previously profane-only form of consumption. The findings revealed that messages sent by traditional media (institutionalised communication), on the one hand, and messages sent by consumers (non-institutionalized communication, on the other, drove the transformation of meanings, resulting in the sacralisation of that act of consumption. Negationist discourses, led by the Brazilian President himself, have produced discursive forces against the path to salvation mentioned above. Such tension heightened the struggle and sacrifice required for individuals to access a product that objectified the chance of survival. In many ways, consumers felt they had to fight to manifest their faith in science, symbolically and sometimes literally.

This sacralisation process manifested itself in a variety of ways. Consumers created hedonistic rituals around vaccinations, such as dressing in fashionable clothes and accessories to get the injection. Many of them captured and shared this moment on social media in a way that

had never been done before. Also, those in line or who had already received the vaccine posted content on social media to support the vaccination campaign, as if they were evangelists spreading a message of salvation. These non-institutionalized forms (Deus et al. 2022) were critical in disseminating the new content that reinforced sacralisation (Belk et al. 1989). Indeed, the combination of this type of communication with the messages sent by mainstream media helped spread various emotions such as "salvation," "victory," "blessing," and "hope" associated with vaccine consumption.

Our study contributes to public health policies by demonstrating that it is necessary to continuously implement popular mobilisation programs to guarantee the success of national health campaigns. Even Brazil, which has health promotion policies established decades ago, needed new tools, such as social media and a massive traditional media campaign, to convince everyone to vaccinate. Science communication must be clear, and consumers must use the mechanisms to avoid campaigns against promoting equal health for all. Public policies can use cultural aspects to dissuade fake news about population health care. Choose good ritual mobilisers and amplifiers in institutionalised and non-institutionalized communications that ensure health recommendations are met. In cultures steeped in religion, combining the discourses of health and faith can be an efficient path.

The discourse produced by mainstream media, and even more so, the amplification of this discourse by consumers themselves on digital platforms, may be the driving force behind the sacralisation of ordinary consumer practice. This conclusion allows more marketers to use the theoretical framework of sacrality in their communication strategies. Indeed, the COVID-19 vaccination saga in Brazil demonstrated the sacralisation process's power in transforming a market.

Despite the peculiarities of the circumstances investigated here, the findings added support to the dual nature of the concept of sacredness. Depending on the flow of meanings in a given cultural context, a particular act of consumption can be perceived as more or less sacred. When this flow is finished, the practice will eventually revert to its original profane condition. Transitions back and forth can take place in the presence of certain elements. This article is the first to use the recently proposed characteristic of sacredness, duality (Schindler & Minton 2022), to study a consumer-related phenomenon.

References

2 anos de covid: Relembre 30 frases de Bolsonaro sobre pandemia. (2022, February 26). Poder360. https://www.poder360.com.br/coronavirus/2-anos-de-covid-relembre-30-frases-de-bolsonaro-sobre-pandemia/).

Arnould, E. J., & Price, L. L. (1993). River magic: Extraordinary experience and the extended service encounter. Journal of Consumer Research, 20(1), 24-45.

Avião com primeiras doses da vacina contra a Covid-19 chega ao Paraná; imunização deve começar nesta segunda-feira (18). (n.d.). G1. Retrieved April 19, 2022, from https://g1.globo.com/pr/parana/noticia/2021/01/18/aviao-com-primeiras-doses-da-vacina-contra-a-covid-19-chega-ao-parana-imunizacao-deve-comecar-nesta-segunda-feira-18.ghtml.

Bartmanski, D., & Woodward, I. (2018). Vinyl record: A cultural icon. *Consumption Markets & Culture*, *21*(2), 171-177.

Belcher, K. (2020). Sacramental Exchange: Eschatological Economy and Consumption Ritual. *Religions*, *11*(11), 586.

Belk, R. W., Wallendorf, M., & Sherry Jr, J. F. (1989). The sacred and the profane in consumer behavior: Theodicy on the odyssey. *Journal of consumer research*, *16*(1), 1-38.

Belk, R. W., Ger, G., & Askegaard, S. (2003). The fire of desire: A multisited inquiry into consumer passion. *Journal of consumer research*, *30*(3), 326-351.

Bryson, J. R., Andres, L., & Davies, A. (2020). COVID-19, virtual church services and a new temporary geography of home. *Tijdschrift voor economische en sociale geografie*, 111(3), 360-372.

Burki, T. (2020). The online anti-vaccine movement in the age of COVID-19. *The Lancet Digital Health*, *2*(10), e504-e505.

Cova, B., Carù, A., & Cayla, J. (2018). *Re-conceptualizing escape in consumer research. Qualitative Market Research: An International Journal.*

Campbell, H. A., & Sheldon, Z. (2021). Religious responses to social distancing revealed through memes during the COVID-19 Pandemic. Religions, 12(9), 787.

Deus, E. P. D., Campos, R. D., & Rocha, A. R. (2022). Memes as Shortcut to Consumer Culture: A Methodological Approach to Covert Collective Ideologies. *Revista de Administração Contemporânea*, *26*.

Epp, A. M., & Price, L. L. (2008). Family identity: A framework of identity interplay in consumption practices. *Journal of Consumer Research*, *35*(1), 50–70. https://doi.org/10.1086/529535

Fernandez, K. V., Veer, E., & Lastovicka, J. L. (2011). The golden ties that bind: boundary crossing in diasporic Hindu wedding ritual. *Consumption Markets & Culture*, *14*(3), 245-265.

Greenberger, C. (2017). Religion, Judaism, and the challenge of maintaining an adequately immunized population. *Nursing ethics*, *24*(6), 653-662.

Hill, R. P., Gaines, J., & Wilson, R. M. (2008). Consumer behavior, extended-self, and sacred consumption: An alternative perspective from our animal companions. *Journal of Business Research*, *61*(5), 553–562. https://doi.org/10.1016/j.jbusres.2006.11.009

Hirschman, E. C. (1986). Humanistic inquiry in marketing research: philosophy, method, and criteria. *Journal of Marketing Research*, 23(3), 237-249.

Hirschman, E. C., Scott, L., & Wells, W. B. (1998). A model of product discourse: linking consumer practice to cultural texts. *Journal of Advertising*, *27*(1), 33-50.

Hochman, G. (2011). Vacinação, varíola e uma cultura da imunização no Brasil. *Ciência & Saúde Coletiva*, *16*, 375-386.

Idosa de 104 anos que venceu a gripe espanhola recebe 1ª dose da vacina contra a Covid-19 no dia do aniversário: "Grande presente." (n.d.). G1. Retrieved April 19, 2022, from https://g1.globo.com/sp/santos-regiao/mais-saude/noticia/2021/02/08/idosa-de-104-anos-que-venceu-a-gripe-espanhola-recebe-1a-dose-da-vacina-contra-a-covid-19-no-dia-do-aniversario-grande-presente.ghtml.

Idosos de 77 a 79 anos enfrentam até duas horas de fila para tomar a vacina contra Covid em São Paulo. (2021, March 3). Fotografia - Folha de S.Paulo. https://fotografia.folha.uol.com.br/galerias/1693231315315269-idosos-de-77-a-79-anos-enfrentam-ate-duas-horas-de-fila-para-tomar-vacina-contra-covid-em-sao-paulo.

Jornal Tribuna 2ª Edição | Professor de 63 anos é o 1º a receber dose de vacina contra a Covid-19 em São Vicente | Globoplay. (n.d.). Globoplay.globo.com. Retrieved April 19, 2022, from https://globoplay.globo.com/v/9431182/.

Kapoor, V., Belk, R., & Goulding, C. (2022). Ritual revision during a crisis: The case of Indian religious rituals during the COVID-19 pandemic. *Journal of Public Policy & Marketing*, 41(3), 277–297.

Kristensen, D. B., Askegaard, S., Jeppesen, L. H., & Anker, T. B. (2010). Promoting health, producing moralisms?. *ACR North American Advances.*

Linneberg, M. S., & Korsgaard, S. (2019). Coding qualitative data: A synthesis guiding the novice. *Qualitative Research Journal*. 19(3), 259-270.

Machingaidze, S., & Wiysonge, C. S. (2021). Understanding COVID-19 vaccine hesitancy. *Nature Medicine*, *27*(8), 1338-1339.

McCracken, G. (1986). Culture and consumption: A theoretical account of the structure and movement of the cultural meaning of consumer goods. *Journal of consumer research*, *13*(1), 71-84.

McCracken, G. (1988). *The long interview* (Vol. 13). Thousand Oaks, CA: Sage.

McGinnis, L. P., Gentry, J. W., & Gao, T. T. (2012). Antecedents to Consumer Perceptions of Sacredness in Extended Service Experiences: The Case of Golf. *Journal of Service Research*, *15*(4), 474–488. https://doi.org/10.1177/1094670512442008

Miller, D. (1998). *A theory of shopping*. Cornell University Press.

Monari, A. C. P., de Araújo, K. M., de Souza, M. R., & Sacramento, I. (2021). Legitimando um populismo anticiência: análise dos argumentos de Bolsonaro sobre vacinação contra Covid-19 no Twitter. *Liinc em revista*, *17*(1), e5707.

Newman, G. E., Diesendruck, G., & Bloom, P. (2011). Celebrity contagion and the value of objects. *Journal of Consumer Research*, *38*(2), 215–228. https://doi.org/10.1086/658999

Ozanne, J. L., & Appau, S. (2019). Spirits in the marketplace. Journal of Marketing Management, 35(5-6), 451-466.

Pereira, B., Fehl, A. G., Finkelstein, S. R., Jiga-Boy, G. M., & Caserotti, M. (2021). Scarcity in COVID-19 vaccine supplies reduces perceived vaccination priority and increases vaccine hesitancy. Psychology & Marketing. 39(5), 921-936.

Phipps, M., & Ozanne, J. L. (2017). Routines disrupted: Reestablishing security through practice alignment. *Journal of Consumer Research*, *44*(2), 361–380.

Pradhan, D. (2022). Pandemics and consumer well-being: Provenance and research priorities. Journal of Consumer Affairs. 56(1), 28-33

Rook, D. W. (1985). The ritual dimension of consumer behavior. *Journal of consumer research*, *12*(3), 251–264.

Saldaña, J. (2009). The coding manual for qualitative researchers. Thousand Oaks, CA: Sage.

Santos, D. D. S., Tenório, E. D. A., Brêda, M. Z., & Mishima, S. M. (2014). Processo saúde/doença e estratégia de saúde da família: o olhar do usuário. Revista Latino-Americana de Enfermagem, 22, 918-925.

Scussel, F. (2021, outubro). What are we trying to escape from? The effects of the neoliberal rationality on the formation of the market around extraordinary experiences. Anais do Encontro da Associação Nacional de Pós-Graduação e Pesquisa em Administração, on-line, 45. Retrieved from http://www.anpad.org.br

Schindler, R. M., & Minton, E. A. (2022). What becomes sacred to the consumer: Implications for marketers. *Journal of Business Research*, *151*, 355–365. https://doi.org/10.1016/j.jbusres.2022.06.022

Tandy Chalmers, S. D., Arthur, D., & Chalmers, T. D. (2008). *Hard-Core Members' of Consumption-Oriented Subcultures Enactment of Identity: the Sacred Consumption of Two Subcultures* (Vol. 35). Association for Consumer Research. http://www.acrwebsite.org/volumes/13620/volumes/v35/NA-35http://www.copyright.com/.

Turner, V. (1969). Liminality and communitas. *The ritual process: Structure and anti-structure*, *94*(113), 125-30.

Vignoli, R. G., Rabello, R., & de Almeida, C. C. (2021). Informação, misinformação, desinformação e movimentos antivacina: materialidade de enunciados em regimes de informação. *Encontros Bibli: revista eletrônica de biblioteconomia e ciência da informação*, *26*.

Psychological factors in vaccine hesitancy behaviors of parents and caregivers regarding HPV vaccines in children and adolescents: a systematic literature review and implications for social marketing

Caroline Graebin

Kavita Miadaira Hamza

Vaccines represent one of the most significant health advances of the last century, playing a crucial role in improving global health. They have been responsible for eradicating diseases such as smallpox, eliminating local outbreaks of measles and polio, and reducing mortality, morbidity, and severity of several infectious diseases (Andre et al. 2008). This positive impact has contributed to the increase in life expectancy worldwide. It is aligned with the Sustainable Development Goals (SDGs), particularly SDG 3, which aims to ensure healthy lives and promote well-being for all ages.

Human papillomavirus (HPV) infection is one of the leading causes of cervical cancer, in addition to being associated with the development of cancers in other regions, such as the oropharynx and anogenital areas (Okunade 2020). According to data from the World Health Organization (WHO), approximately 350,000 deaths were caused by cervical cancer in 2022, with 94% of these cases occurring in low- and middle-income countries. To reduce mortality associated with this type of cancer, the WHO recommends universal vaccination of girls between the ages of 9 and 14 and the start of cervical screening from the age of 30 (World Health Organization 2020).

Despite the proven benefits of vaccines and their availability, many parents and caregivers engage in vaccine hesitancy behaviors, which represents a significant obstacle to the widespread implementation of vaccination strategies, especially in the case of the HPV vaccine. This scenario highlights the need to understand better the psychological factors that motivate vaccine hesitancy to develop effective strategies that can increase vaccine acceptance and, consequently, contribute to reducing the incidence of cervical cancer and other HPV-related diseases. Therefore, we propose the following research question: what psychological factors are associated with vaccine hesitancy among parents and caregivers regarding HPV vaccines for children and adolescents?

This systematic review was conducted following the protocol of Paul et al. (2021). Peer-reviewed articles were searched in the Scopus and Web of Science databases between 2014 and

2023, which returned 3,334 articles after eliminating duplicate files. Articles in the Q1 extract of Scimago were selected as a quality assessment criterion. After reading titles and abstracts, articles that did not address psychological factors on vaccine hesitancy behaviors of parents, caregivers, and guardians for HPV vaccines in children and adolescents were excluded, resulting in 85 articles for full reading. The articles selected in this final stage were analyzed by the TCCM Framework (Paul & Rosado-Serrano 2019).

Among the results are concerns about trust in the HPV vaccine and its respective providers. Such concerns relate to the vaccine's safety and efficacy, linked to doubts about side effects or even distrust about the trials, leading to doubts about the need to administer the vaccine (Forster et al. 2017; Szilagyi et al. 2020).

Another factor compromising vaccine uptake is distrust of authorities, institutions, and providers. Some individuals believe that pharmaceutical companies produce vaccines exclusively for economic interests without considering the real benefits to public health (Forster et al. 2017). This distrust also extends to governments and health authorities, often associated with allegations of a lack of clarity regarding the need for and benefits of vaccines (Albright et al. 2017).

The lack of information and knowledge about HPV infection and its respective vaccine permeates much of the trust issues related to vaccine hesitancy (Ailloud et al. 2023; Albright et al. 2017). This scenario favors the emergence of misinformation, rumors, and conspiracy theories, such as the fear that the vaccine causes infertility in girls (Essoh et al. 2023). The lack of information also contributes to the perception of low risk of HPV infection, as well as to the perception of low severity or few health impacts (Porter et al. 2018). In this context, vaccine hesitancy behavior arises when the individual believes that the risks of the HPV vaccine outweigh its benefits.

Another relevant issue in HPV vaccine hesitancy behaviors is concerns related to sexuality. Some parents and caregivers believe that the HPV vaccine may encourage early sexual initiation, promote increased sexual activity, or encourage unsafe sexual behaviors in their children (Lindsay et al. 2022; Malkin et al. 2022). These concerns are influenced by cultural and religious perceptions about sexuality, as well as moral judgments about promiscuity (Foster et al. 2021; Lindsay et al. 2022).

The results also indicate that external influences such as family, religion, and social norms can mediate vaccine hesitancy behaviors. It happens because individuals tend to adopt perceived

criteria of social desirability (Fu et al. 2019). Likewise, personal characteristics such as social identity and self-esteem also influence the formation of vaccine hesitancy behaviors (Ailloud et al. 2023).

The behavioral factors related to vaccine hesitancy identified in this study provide essential directions for designing social marketing campaigns. Lack of information and knowledge underlies most negative attitudes toward vaccines. Strategic and well-planned campaigns have the potential to reduce vaccine hesitancy behaviors significantly.

The main difference between HPV vaccine hesitancy and other vaccines is concerns related to sexuality. It happens because HPV is primarily transmitted through sexual contact. Thus, in addition to concerns about the vaccine itself, there is a belief that vaccination may encourage stigmatized sexual behaviors. In this context, marketing campaigns can play a crucial role in promoting a healthy discussion about the vaccine within families and communities, highlighting its importance in preventing sexually related diseases that may arise in later life in adolescents.

Vaccine hesitancy behaviors, in general, are often associated with fear of potential health harm resulting from vaccine administration and the individual's belief that vaccine-preventable disease is not significantly severe. This study, however, identified the presence of specific beliefs related to behavioral changes (in this case, sexual behaviors) attributed to HPV vaccine administration, adding a new dimension to the understanding of the factors that influence vaccine hesitancy.

For managerial reasons, marketing campaigns should be developed to promote knowledge about the safety and efficacy of vaccines, reinforcing communication about the susceptibility and severity of HPV infection. In addition, it is essential that these campaigns encourage an open and constructive dialogue about sexuality to demystify stigmas and strengthen understanding about the protection offered by the vaccine. Such approaches can increase vaccine acceptance and minimize hesitancy by creating an environment of trust and clarification for decision-making by parents and caregivers.

References

Ailloud, J., Branchereau, M., Fall, E., Juneau, C., Partouche, H., Bonnay, S., Oudin-Doglioni, D., Michel, M., Gagneux-Brunon, A., Bruel, S., Thilly, N., & Gauchet, A. (2023). How can we improve the acceptability of vaccination against Human Papillomavirus (HPV) in France?

An original qualitative study with focus groups comprising parents and school staff, interviewed separately. *VACCINE*, *41*(31), 4594–4608.

Albright, K., Barnard, J., O'Leary, S. T., Lockhart, S., Jimenez-Zambrano, A., Stokley, S., Dempsey, A., & Kempe, A. (2017). Noninitiation and Noncompletion of HPV Vaccine Among English- and Spanish-Speaking Parents of Adolescent Girls: A Qualitative Study. *Academic Pediatrics*, *17*(7), 778–784.

Andre, F. E., Booy, R., Bock, H. L., Clemens, J., Datta, S. K., John, T. J., Lee, B. W., Lolekha, S., Peltola, H., Ruff, T. A., Santosham, M., & Schmitt, H. J. (2008). Vaccination greatly reduces disease, disability, death and inequity worldwide. *Bulletin of the World Health Organization*, *86*(2), 140–146.

Essoh, T. A., Adeyanju, G. C., Adamu, A. A., Tall, H., Aplogan, A., & Tabu, C. (2023). Exploring the factors contributing to low vaccination uptake for nationally recommended routine childhood and adolescent vaccines in Kenya. *BMC PUBLIC HEALTH*, *23*.

Forster, A. S., Rockliffe, L., Marlow, L. A. V., Bedford, H., McBride, E., & Waller, J. (2017). Exploring human papillomavirus vaccination refusal among ethnic minorities in England: A comparative qualitative study. *Psychooncology*, *26*(9), 1278–1284.

Foster, S., Carvallo, M., Lee, J., Fisher, R., & Traxler, H. (2021). An Implication of Impurity: The Impact of Feminine Honor on Human Papillomavirus (HPV) Screenings and the Decision to Authorize Daughter's HPV Vaccinations. *Stigma and Health*, *6*(2), 216–227.

Fu, L. Y., Zimet, G. D., Latkin, C. A., & Joseph, J. G. (2019). Social Networks for Human Papillomavirus Vaccine Advice Among African American Parents. *Journal of Adolescent Health*, *65*, 124–129.

Lindsay, A. C., Delgado, D., Valdez, M. J., Restrepo, E., & Granberry, P. (2022). "Everyone in Our Community Should be Informed About the Human Papillomavirus Vaccine": Latinx Mothers' Suggested Strategies to Promote the Human Papillomavirus Vaccine. *American Journal of Health Promotion*, *36*(5), 853–863.

Malkin, J., Scott, L. A., Machado, A. A., Teare, G., Snider, J., Tirmizi, S. F. A., Bandara, T., Rathwell, M., & Neudorf, C. (2022). Factors influencing human papillomavirus school-based immunization in Alberta: A mixed-methods study protocol. *PLOS ONE*, *17*(12).

Okunade, K. S. (2020). Human papillomavirus and cervical cancer. *Journal of Obstetrics and Gynaecology*, *40*(5), 602–608.

Paul, J., Lim, W. M., O'Cass, A., Hao, A. W., & Bresciani, S. (2021). Scientific procedures and rationales for systematic literature reviews (SPAR-4-SLR). *International Journal of Consumer Studies*, *May*.

Paul, J., & Rosado-Serrano, A. (2019). Gradual Internationalization vs Born-Global/International new venture models: A review and research agenda. *International Marketing Review*, *36*(6), 830–858.

Porter, R. M., Amin, A. B., Bednarczyk, R. A., & Omer, S. B. (2018). Cancer-salient messaging for Human Papillomavirus vaccine uptake: A randomized controlled trial. *Vaccine*, *36*(18), 2494–2500.

Szilagyi, P. G., Albertin, C., Gurfinkel, D., Saville, W., Vangala, S., Rice, J., Helmkamp, L., Zimet, G. D., Valderrama, R., Breck, A., Rand, C., Humiston, S. G., & Kempe, A. (2020). Prevalence and Characteristics of HPV Vaccine Hesitancy Among Parents of Adolescents Across the US. *Vaccine*, *38*(38), 6027–6037.

World Health Organization. (2020). Global strategy to accelerate the elimination of cervical cancer as a public health problem. In *World Health Organization*. https://www.who.int/publications/i/item/9789240014107

Queer Theory and Decolonialism: a discussion on deepening the understanding of the queer individual when viewed through a decolonial lens

Beatriz Gloria Hossmann

Abstract:

The purpose of this article is to provide a discussion on deepening the understanding of the queer individual through a decolonial lens. Thus, it is concluded that many authors who associate both theories do so because they see the need to better understand why people who do not fit into a heteronormative standard are classified as strange, odd, sodomites, pederasts, and perverse. For these authors, this can only be understood when we trace back to a history of colonial domination and control over gender, sexuality, religion, politics, economy, race, and epistemology, which creates the need to adopt an intersectional perspective when looking at queer theory, in order to avoid reproducing hegemonic patterns from the Global North. It is believed that, in the field of marketing studies, by adopting such a lens, one can gain a broader view of the possibilities and invisibilities of queer individuals in different consumption and media contexts especially when working with the Latin American reality of the Global South—a region marked by a history of colonization but also possessing a vast ethno-cultural diversity to be explored.

Introduction

Post-structuralist thought, philosophically driven since the 1960s, directly influenced the development of queer theory, which was formulated and disseminated years later. This emerged from the influence of thinkers such as Nietzsche (1844-1900) and was further propelled as a movement by contemporary authors like Foucault (1926-1984), Deleuze (1925-1995), and Derrida (1930-2004), who, by rejecting or transforming the theoretical principles of structuralism, proposed a mode of thought that rejects traditional philosophical foundations, such as the ideas of truth, objectivity, and reason. In this context, there is a counterposition to Enlightenment thought, which assumed the existence of a substantial metaphysics of the subject, understanding instead that the existence of this subject is the result of a social construction in direct contact with culture, rather than something stemming from a pre-established nature.

It was through the logic of thought presented that Teresa de Lauretis coined the term “queer theory” in 1991, leading to the development of a theory that would address the non-

hegemonic body and the discourse that opposes the bourgeois body discourse, which, according to Foucault (1977), was read as a standard, hygienic body easily affirmed within normative society. Thus, authors such as Butler (2003), Rubin (1984), Louro (2004), Miskolci (2007), Mariano (2005), Sedgwick (1993), and Straayer (1996) can be seen as authorities on the subject, especially regarding the approach to constructing a counter-hegemonic thought, with a focus primarily on sexuality, gender, and even sex as socially constructed performative categories, based on a stylized repetition of acts. In other words, for these authors, heterosexuality is constructed from the moment of birth when a baby is labeled as belonging to either the male or female sex, and thus, behavior models are established that the individual must follow in order to be read, in a binary way, as either a man or a woman by society, as if there were no other possibility to follow (e.g., playing fight versus playing with dolls/ conquering versus being conquered/ being attracted to women versus being attracted to men, etc.).

It is important to note, however, that while, on one hand, the seminal authors of this study speak of a counter-hegemonic thought and bodies read as queer for opposing an imposed normative logic, on the other hand, these same authors fail to delve into the reason why the queer identity was constructed. This is because it is only read, in the translation of the word, as strange, odd, transgressive, perverse, and disturbing, due to the need for control over gender and sexualities arising from a colonization of bodies (Lugones 2010), which, beyond conforming to specific desires, were also expected to be white, of high social class, and to belong to various other hegemonic standards. Thus, even though authors like Souza (2017) argue that the term queer is not limited to sexual identities that deviate from heteronormativity, but also encompasses any form of identity production that deviates from socially constructed norms, it is clear that the most well-known authors in the field, who are predominantly based in the Global North, do not fully explore the issue of intersectionality, which was previously addressed in the context of gender – race – class by Brazilian intellectual Lélia Gonzalez in the 1970s, even before the term intersectionality was coined and later brought forward by Crenshaw (1989), who pointed out sexuality, as well as gender, race, and class, as a matter that also forms part of the thread that makes someone easily assimilated or socially excluded.

For this reason, it is possible to see that queer analytics appears incomplete when it comes to explaining why subjects who do not fit into a hegemonic standard occupy this "non-place" in society. Their understanding could be deepened if associated with a decolonial context, which

would enrich and benefit it. This is because the decolonial approach would aim to revisit a past of colonization that affected various aspects of oppression against non-bourgeois bodies, so that today, in modernity, the consequence is that these bodies are read as strange, odd, and bothersome (queer). In this way, by understanding this process of domination stemming from a past in which Eurocentric values were considered relevant and human, while those who did not conform to this same standard were seen as irrelevant, irrational, and inhuman, it is believed that we can come closer to the emancipation of colonized and controlled bodies that have been subjected to these dynamics for so many years.

The relevance of the research for administrative studies in the fields of marketing and organizational studies lies in the fact that, despite the growth in research production involving gender issues in the fields of management and marketing in recent years (Abdalla and Brito 2016; Paniza 2020; Santos et al 2024; Tressoldi 2023), few studies provide a deep exploration of queer theory as the theoretical framework supporting the research or address intersectionalities in studies involving gender/sexuality issues. Furthermore, when this perspective is introduced, as in the works of Ferreira and Pereira (2020), Souza (2017), and Souza and Carrieri (2010), the theoretical framework tends to focus on authors who study gender exclusively from a queer perspective, while Chedid and Hemais (2022), Amaral and Naves (2020), and Duarte and Marquezini (2024) approach gender only from a decolonial perspective. Furthermore, Hossmann, Pessôa, and Pereira (2024), in a marketing study, pointed out that most of the queer characters that appear in Brazilian media are white, thin, from a high social class, monogamous and fit into various hegemonic social standards that do not reflect the profile of the average Brazilian or Latin American. Thus, they end up being minimally subversive, in a way that doesn´t cause any kind of estrangement for the audience consuming them, resulting in little diversity and representation in the narrative (Sanchez 2014). This situation may stem from the fact that queer analytics is still not sufficiently transgressive in its theory and does not typically engage with racial issues. Therefore, this research aims to propose a theoretical reflection that highlights the importance of considering coloniality within queer studies, as well as offering a gender, sex, and sexuality reflection within decolonial studies, specially in the Global South context. This way, it is believed that future studies in the field of marketing will address both the consumption habits of marginalized social groups and different media products that analyze perspectives on diversity, as well as inclusion practices in organizations with a more in-depth, critical, intersectional, and

transmodern view, considering the fact that there is still the reproduction of a coloniality that transmits dominant values from the United States and Europe, while culturally neglecting values from the Global South and Latin America in research and in products related to the consumer market (Abdalla and Faria 2017).

Thus, considering this trajectory, the present article aims to answer the following question: how is the queer individual understood when viewed through a decolonial lens?

Literature Review

The foundations of queer theory

Queer analytics was grounded in post-structuralist studies, mainly based on the research conducted by Foucault (1977) and the conclusions presented in his book *The History of Sexuality*. In this work, the author questioned hegemonic identity/binary thought, addressing not only the historical nature of sexuality but also its capacity to act as a device of power and control within society. This is because, for Foucault, one of the primary forms of class consciousness is the affirmation of the body, and the bourgeoisie transformed the blue blood of the nobility into a healthy organism and a wholesome sexuality, thus ensuring domination over those who did not belong to this group, as if their bodies were perverse, invalid, non-human, pathological, deviant, and unspeakable (Foucault 1977).

After this initial step, authors like Lauretis (1991) and Butler (2021) gained prominence. The former, after coining the term queer theory as a theory that would address bodies that did not fit into a hegemonic standard, and the latter, for delving into queer studies, examining both sex, gender, and sexualities as social constructions or performances, shaped in contact with culture. Butler (2021) pointed out that many of the feminist debates up until that point presented a universal concept of women, as if the man were the "self" and the woman the "other," as De Beauvoir (1980) had stated. However, by presenting the woman as the "other," only the reality of the bourgeois European woman was considered, who, despite all her privileges, was still, as a woman, also heterosexual. Thus, the author begins to deepen the exploration of the reality of women and individuals, in general, who do not fit into pre-established gender and sexuality norms, studying their reality as an "other" even more "other" than the bourgeois woman. In other words, a subject who is read as not belonging or even belonging to a non-place in society (Louro, 2004). Therefore, for Louro (2004, p.38-39) the definition of queer would be:

[...] queer means positioning oneself against normalization – regardless of where it comes from. Its most immediate target of opposition is, certainly, the compulsory heteronormativity of society; but it would not escape its criticism of the normalization and stability proposed by identity politics [...]. Queer clearly represents difference that does not want to be assimilated or tolerated and, therefore, its form of action is much more transgressive and disruptive.

For queer theorists, heterosexuality is not innate but compulsory, creating a heteronormativity (Warner 1993) in society that leads people to believe that genitalia can define both gender and sexuality. However, for Butler (2021), Louro (2004), Rubin (1984), and Gauntlett (2002), gender binarism is something repeated across generations through stylized acts, which make those with genitalia designated as female always relegated to passivity, service, an exaggerated performance of femininity, delicacy, and ultimately, attraction to men. Meanwhile, those with genitalia designated as male are led to conquest, adventure, performance of masculinity, a preference for aggressive activities, and also attraction to women, as if no other possibilities were to be followed.

According to Rubin (1984), it is as if there is a kind of circle of sexual hierarchy, in which what is and what is not considered a normative and hegemonic expression of sexuality is shown. Among these expressions are those that fall within the boundaries of what is seen as “acceptable,” “good,” and “normal,” such as: heterosexual, monogamous, and procreative. On the other hand, there are queer expressions, or those that lie outside the expected boundaries, being viewed as abnormal and deviant, such as: homosexual, promiscuous, and casual (Figure 1). In this way, it is understood that certain sexual expressions are more easily assimilated within a heteronormative society than others, so that if someone subverts heterosexual desire but remains within the boundaries of the so-called charmed circle, that person will be less socially excluded than someone who subverts more than one standard.

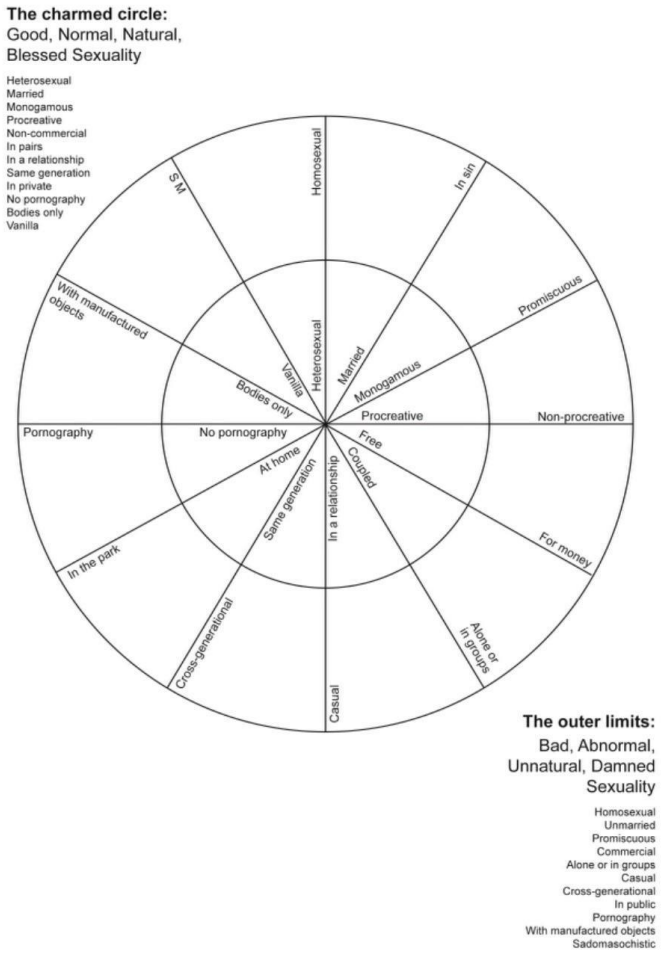


Figure 1 – The circle of the sexual hierarchy. Gayle Rubin (1984)

Source: *Thinking Sex: notes for a radical theory of the politics of sexuality*.

In summary, for Gauntlett (2002), according to the foundations of queer theory: identity is understood as not fixed, but fluid, as it is constructed in contact with culture and, therefore, changes over the years; it is believed that one has an identity formed and marked by an essence due to the amount of discourses perpetuated about it; and gender is a performance based on a binary social construction of what it means to be a man or a woman. In short, queer theory aims to "[...] transgress the established logic, think the unthinkable, admit the unbearable, cross boundaries [...] seek fissures in the dominant episteme and dare to go beyond" (Louro 2004, p. 93).

The decolonial thinking

Decolonial thought encompasses a set of analytical categories aimed at critiquing the modern colonial model. In other words, it critiques modernity, which is marked by strong traces of coloniality, stemming from a period of European exploitation and colonization of countries in the Global South. This coloniality dominates both knowledge, through the role of epistemology and the tasks of knowledge production in reproducing colonial thought regimes, and being, referring to the lived experience of colonization and its impact on language (Mignolo 2018). These are reflections of the coloniality of power, where there is economic and authoritarian control over nature and natural resources, gender and sexuality, as well as over the subjectivity and knowledge (Ballestrin 2017; Quijano 2007) of the colonized.

According to Quijano (2005), one of the greatest forms of epistemic domination over the world's population was the construction of the idea of race by the colonizer, who placed the white European man at the center of power and knowledge, while those who did not fit this standard were seen as devalued and devoid of knowledge, thus constructing an Eurocentrism. In this way, those who previously identified as Yoruba, for example, came to be read as Black, and those who previously identified as Tupi-Guarani, for example, came to be read as Indigenous, as a way to categorize them in opposition to the white man. In these circumstances, the model to be followed became the European heterosexual, white, patriarchal, Christian, military, and capitalist man, who dominated all spheres of power (Grosfoguel 2008).

Thus, the decolonial movement seeks a new modernity, also called transmodernity, which, for Dussel (2012), would be characterized by the valorization of the cultural, political, and economic identities of all peoples, not just the identity of the colonizer. This is because, by exploiting and oppressing the colonized, the colonizer positioned himself as human, rational, and worthy of value, while the colonized was labeled as non-human, savage, irrational, and unworthy of value (Lugones 2010), categories that are perpetuated as a reflection of this domination process to this day.

How the queer individual came to be classified as queer?

According to Louro (2004), a Brazilian researcher of queer theory, it was not until the 19th century that the term homosexual began to be used historically. This is because, in previous centuries, relationships between people of the same sex were seen as "sodomy." This term refers

to the story of Sodom and Gomorrah presented in the Christian Bible, which is interpreted by many followers of the religion as a sign of homosexuality as something sinful, because it does not serve the purpose of procreation.

Despite this, homoerotic practices are not recent, as there are records of individuals engaging in such relationships for both emotional and religious purposes since Ancient Greece, Ancient Japan, Ancient Rome, and also in the rituals of Indigenous peoples (Laurindo 2020), long before the perception of homosexuality as an identity or even as a sin. This shows that what was called "perverse" by Foucault (1977), since it was read as sodomy, was not perceived as such until the occurrence of colonization.

Moreover, according to Blumenfeld (2021), a researcher on social inequalities, hate, and religion, since the 9th century B.C. in Rome, there are records of laws against sex between two men or two women. For Von Hunty (2024), the hatred against people who today identify within the LGBTQIAPN+ acronym has the same root as the hatred against the female body, as the goal of such devaluation of these social groups comes from a need to control bodies in order to control the production of armies and labor. This is because, by devaluing certain groups, they could be more easily subjected to others and thus controlled as a labor force. This is why there is a strong connection between the reason why abortion was also prohibited for a long time and still is in many countries and cultures, as well as why there is such significant judgment placed on non-heteronormative groups: because using intimate parts for pleasure rather than procreation, and consequently generating more labor that could be controlled, deserved punishment. In this case, the history of gender and sexuality control also has a strong political bias in the struggle of systems for the control of bodies, because in order to produce masses, the body and sexuality cannot be liberated but must be products of oppression (Blumenfeld 2021; Von Hunty 2024).

According to Santos (2023), queer indigenous studies suggest that by examining the experiences of Indigenous people who did not follow the imposed heterosexual logic, it became clear that colonization was not only a matter of control over territory, culture, and religion—where Christianity was presented as good and Indigenous spiritual practices as bad—but also involved a "colonization of sexuality," which occurred through the "imposition of the sexual values of the dominant culture, resulting in the restriction and marginalization of gender identities and expressions that did not fit into binary and normative categories outside of the binary model" (Santos 2023, p. 328). This is also the path taken by Lugones (2010), who asserts

that control over gender began with the construction of a dichotomy that placed, on one side, a colonizing subject—white, Christian, heterosexual, and European—as human, and on the other side, a colonized subject, who followed the opposite path and was thus depicted as non-human and even savage. For the author, even the binary idea of gender—man versus woman—was imposed during European colonization, so that native peoples, when being read as savages, were no longer perceived in the same dichotomous manner as men and women were, but as distortions of bourgeois European men and women. In other words, as non-men and non-women—hypersexual, lustful, and irrational.

Furthermore, according to Oyewùmí (2004), the traditional Yoruba family does not organize itself in a gendered way, as do Western European families. Thus, kinship roles are not organized by gender, but by seniority, so that older individuals are prioritized in social interactions. Therefore, there are no terms that can be translated as "boy," "girl," "man," "woman," "husband," or "wife," but rather terms such as older brother (egbon), younger brother (aburo), and people who enter the family by birth or marriage (oko and iyawo, respectively). This principle is more fluid than the gendered and binary principle of gender brought by the colonizers, as roles are situational depending on the context in which individuals are placed and not static in language. This case reinforces the fact that the universal idea of men and women was brought about by the colonization process, as many communities did not hierarchically divide in this way. Additionally, it reinforces that this understanding generated new forms of organization in global South groups and also a patriarchy, in which even those subjects who were understood by the colonizers as “non-men” began to turn against “non-women,” making them complicit in the oppression of women (Lugones 2010). This situation was perceived by Anzaldúa (2004), a Chicana feminist, who, in her book *Borderlands/La Frontera*, shows how she felt a sense of not belonging to the order precisely because, in addition to being a lesbian, she was also an expatriate and a Latina woman living in the United States, where she heard oppressive discourses being spread by people within her own Chicana community. This is also a living portrait of how the queer subject is the result of a colonizing process of gender, sexuality, race, politics, economy, and religion that is reflected in the marginalization they suffer for being constructed as strange, perverse, eccentric, and belonging to a non-place in society (Louro 2004) in order to be dominated. In other words, they are queer because they do not follow the dominant logic of the colonizer.

What do studies that link queer theory to decolonialism say?

According to Pereira (2015, p. 413), in "Queer Decolonial: when theories travel," "queer theory is not external to coloniality, nor can it be thought of in isolation from the geopolitical contexts of its itineraries and appropriation, as well as the processes of translation involved." To do so, the author uses the concept of coloniality of power presented by Quijano (1991, 1998, 2000) to show how we live today in a society that is a reflection of colonial administrative processes that continue to perpetuate a domination process. In other words, for him, it is essential to decolonize queer theory in the sense of understanding queer as a subject constructed by an Eurocentric logic that turned it into "the other," a reflection of the colonial apparatus that presents it as inferior, disqualified, and abject. In this sense, for the author, it is essential to recover this identity that was rendered inferior by the colonial project, allowing for an opening to theories and experiences that enable these knowledges to affect and transform. Additionally, for Pereira (2020):

Decolonial feminism and decolonial queer share certain positions. They are fields under construction, spaces that converge the strength of bodies and geopolitics. Colonial difference is manifested in the bodies. Bodies are not just bodies-in-time, but bodies-in-space, and bodies are entangled in spaces. It is impossible to separate abject bodies and dissident sexualities from geographic location, language, history, and culture. Queer theory is also a politics of location. Feminism, queer, and decolonial thought are embodied theories.

However, the author raises the issue of the difficulty in translating the term queer, which already suggests, to some extent, a challenge in fully decolonizing the theory.

For Pedroza and Diniz (2022), in "Queer Theory: a revolutionary and decolonial space of identity," the connection between queer studies and decolonial studies lies in the importance of addressing and affirming the identity of the subaltern in all spheres, whether socially, academically, or through art, in television media products.

In Santos (2023) view in "Queer Beyond Borders: Intersectionality and Decoloniality in the Reimagining of Queer Studies," contrary to Pedroza and Diniz (2022), although the author also sees great importance in having a decolonial thought and understanding the roots of the queer subject to comprehend why the subaltern is subaltern, he does not view queer theory as a decolonial space of identity. This happens because, for the author, seminal queer theory researchers such as Judith Butler and Teresa de Lauretis do not present a research agenda that

deeply encompasses the approach to intersectionalities, focusing mainly on gender and sexuality issues, especially in Butler's seminal book *Gender Trouble* (2021). Thus, even though they recognize the importance of considering race and ethnicity, this remains a gap that is scarcely explored by both. Therefore, there is no retrieval of colonial exploitation in the construction of the non-hegemonic subject by these authors. It is also worth noting that, when it comes to the most well-known queer theory authors, even Brazilian scholar Guacira Lopes Louro does not present a decolonial project within the queer studies field, despite studying heteronormativity in depth within Brazilian education. In other words, for Santos (2023), it is indeed important and even necessary to think about colonization in the process of constructing the non-hegemonic identity within queer theory and how to recover it from this coloniality, but he understands that most seminal authors do not make this association.

In contrast, Santos (2023, p. 324) points to the Queer of Colour approach as one of extreme importance in the context of associating queer analytics with racial, ethnic, and class contexts. This approach is a "movement that seeks to highlight the possible limitations of queer studies by not practically considering the cultural and historical differences that influence the experiences of people in various social contexts," even beyond the Western context, as seen in the work of African-American sociologist Rodrick A. Ferguson in the book *Aberrations in Black: Towards a Queer of Color Critique* (2004). He also cites Bakshi (2016, pp.1-2), who proposes the concept of decolonial queerness as:

A critical approach to sexuality and queer identity that challenges hegemonic norms and colonial power hierarchies that have shaped the construction of sexuality and identity in marginalized groups. This reading questions and confronts binary norms of gender and sexuality, valuing the experiences and identities of historically marginalized and delegitimized people, especially in colonial contexts. This implies recognizing and valuing non-binary, queer, and transgressive identities and practices in relation to hegemonic norms of gender and sexuality, as well as valuing cultural diversity and the knowledge and traditional practices of queer and trans communities from different backgrounds.

The author also presents queer indigenous studies and the two-spirit approach as frameworks that interpret the experiences of Indigenous people who are non-heterosexual and/or do not conform to the gender norms imposed by hegemony. Another author highlighted by Santos (2022) who follows the path of understanding Indigenous peoples is Baptista (2021),

who examines the impact of the clash between Amerindian conceptions and Christianity on the gender and sexuality relations of these peoples, which characterize currently colonized territories, bringing to light the issues of sodomy and pederasty as terms used to marginalize and oppress native peoples. Beyond these, Anzaldúa (2004) is also presented as an author who authoritatively explores the intersection of identities, examining gender and sexuality as complex social constructs that are shaped by various cultural, racial, ethnic, historical, and class factors.

In summary, for Santos (2022), decolonial queer would be a political and theoretical approach that recognizes the importance of decolonizing not only physical territories but also bodies and minds, celebrating the different identities and boundaries that encompass queer experience. It challenges the norms that control these freedoms and expressions, examining the intersections of race, gender, class, and sexualities in the process of creating the subject's subjectivities, while also pointing out the difficulty in translating the term queer into the realities of the Global South, given that it is a term in english.

For Jesus (2020), in "History and Queer Theory: Possibilities on the Margins," it is important to think about queer while also considering the process of colonization, given that the way history was written was heavily influenced by Europeans, who defined norms for how to "handle it, write it, relegating to the margins knowledge considered subaltern," thus constructing a political, territorial, economic, and epistemic domination. Therefore, from the perspective of philosopher Tiburi (2013), it is important to expand queer to a context that encompasses everything that can be seen as non-hegemonic, meaning that it does not represent the reality of the bourgeois white, European, and Christian man.

Lastly, Torres and Fernandes (2021), in "Queer (Neo) Colonial: Coloniality and Queer Theory in Brazil," present a critical view of queer theory and colonization, pointing out that the queer discourse, even that of Latin America disseminated in the last decade, is not inclusive of racialized voices in the process of constructing meanings, theories, and experiences. They argue that it is necessary to build a research agenda on non-hegemonic sexualities that is not based on thinkers from the Global North. This is because, according to the authors, reproducing the already well-known international dynamics of queer theory may also lead to the reproduction of absences and (neo)colonial practices.

Final Considerations

The article in question aimed to bring a discussion on the deepening of the understanding of the queer individual when viewed through a decolonial lens.

Thus, by revisiting the construction of the queer subject, it becomes clear how the establishment of this narrative, which involves the perception of a strange, odd, deviant, and disruptive being, stems from a history of epistemic colonization that spans across political, economic, religious discourse, as well as control over gender and sexuality for the purpose of gaining power and manifesting oppression by the white, Christian, European, and heteronormative man (Blumenfeld 2021; Laurindo 2020; Von Hunty 2024). This narrative led to the queer subject being perceived as perverse (Foucault 1977), sodomite (Louro 2004), savage and inhuman (Lugones 2010), always positioned at the borders/ in non-places (Anzaldúa 2004).

By reviewing research that sought to intersect queer analysis and decolonial studies, it was concluded that authors known as seminal within queer and post-structuralist studies, such as Michel Foucault, Judith Butler, Gayle Rubin, Teresa de Lauretis, and even Brazilian Guacira Lopes Louro, despite understanding sex, gender, and sexualities as performative social constructions based on a stylized repetition of acts that reinforce a binary and heteronormative system—treating those who deviate from this duality as queer—do not seek to deeply understand why the system was constructed as heteronormative. In other words, the history of domination and colonization, and the reflection of that control over bodies in modernity, is not explored in the agenda of the main queer theory authors. Moreover, these seminal researchers also fail to delve into the intersections of race, ethnicity, and class in order to understand the non-hegemonic in a more robust manner.

On the other hand, many authors who address queer theory from a decolonial perspective consider the decolonial lens essential for understanding the queer subject, given that such a subject is only read in this way due to a history of exploitation and oppression originating from the normative white European man, who treats those who deviate from this standard as subaltern and without value in society.

It is also noted that a common point raised by many scholars of queer theory and decolonialism is the difficulty in translating the term queer. Some even believe that relying solely on seminal authors from the global north as the foundation for queer studies is a replication of (neo)colonialism, and they argue for the need to build a research agenda on non-hegemonic bodies and sexualities that includes authors from the global south as its foundation.

It is also noticeable that much of the work presenting a decolonial and intersectional view associated with queer comes from the Global South, as is the case with the authors of the analyzed articles, as well as Gloria Anzaldúa, Jean Baptista, Sandeep Bakshi, and Rodrick A. Ferguson, who study queer in relation to Latinities, Indigenous peoples, religion, and Blackness, respectively. These authors show how the discussion and concern with decolonization primarily come from those who experience the reality of not belonging to a dominant territory, thus constructing theories outside the United States and Europe axis.

It is clear, therefore, that understanding why the queer subject is classified as such by authors who associate both of the theoretical lenses previously mentioned goes far beyond the fact that they simply do not fit into a heteronormative system. It becomes evident that, for the authors encountered, there is a need to adopt a decolonial lens and delve into the intersectionalities to seek the emancipation of this subject, who is shaped by a history of colonization and domination.

The objective of this article for the field of marketing was, therefore, to provide a reflection on the importance of considering other intersectionalities when working with queer subjects, whether through interviews with consumers or media product analysis, especially in the Latin American context of the Global South. This region, in addition to being marked by a history of colonization, still holds a vast physical and identity-related diversity among individuals. Thus, understanding that the foundation of this queerification is colonization — the same process that established various other ethnic, cultural, racial, gender, and relationship norms as "correct" while positioning others as "inferior"— it is believed that, by adopting this more nuanced perspective, a more diverse and transmodern understanding of such subjects can be sought, taking into account existing possibilities and invisibilities.

References

Abdalla, C. C., & Brito, E. P. (2016). Gender Research in Consumer Culture Theory: A Classification from a Post-Structuralist Perspective. 12th Latin American Congress on Retail and Consumption: Digital Transformation in Retail. Available at: http://bibliotecadigital.fgv.br/ocs/index.php/clav/clav2016/paper/view/5865.

Abdalla, M. M., & Faria, A. (2017). In defense of the decolonial option in administration/management. *Cadernos EBAPE.BR*, 15(4), 914–929. Retrieved from https://periodicos.fgv.br/cadernosebape/article/view/5524.

Amaral, I.G., & Naves, F. (2020). Confronting gender oppressions at a public university: the role of collectives from a decolonial feminist perspective. *Revista Brasileira de Estudos Organizacionais*, 7(1), 877–910, JAN/MAY. DOI: https://doi.org/10.21583/2447-4851.rbeo.2020.v7n1.305.

Anzaldúa, G. (2004*). Borderlands/ La Frontera*. In: Rivkin, J,; Ryan, M. Literaty Theory: an anthology. 2 ed. Blackwell: Malden, 2004.

Ballestrin, L.M. de A. (2017). Modernity/Coloniality without "Imperiality"? The Missing Link of the Decolonial Turn. *Revista de Ciências Sociais*, Rio de Janeiro, 60(2), 505–540.

Baptista, J. (2021). *Queer Indigenous Studies: Or how I "stopped" being Indigenous to be gay*. *Revista Anômalas*, 1(2).

Blumenfeld, W. (2021). A quick summary on the history of homophobia in the west. *Outleadership.*

Butler, J. (2021). *Gender Trouble: Feminism and the Subversion of Identity*. Civilização Brasileira Publishing. 21st edition.

Chedid, Y. D., & Hemais, M. W. (2022). *Subalternization of Brazilian women in tourism contexts: A postcolonial analysis based on Spivak*. *Revista Brasileira de Pesquisa em Turismo*, 16, 2357. https://doi.org/10.7784/rbtur.v16.2357

Crenshaw, K. (2002). *Document for the meeting of experts on aspects of racial discrimination related to gender*. *Estudos Feministas*, 10, Rev. jan.

De Beauvoir, S. (1980). *The Second Sex – The Lived Experience*; translated by Sérgio Millet. 4th ed. São Paulo: Difusão Europeia do Livro.

Duarte, K.C., & Marquezini, H.C.A. (2024). *Was it a hair transition from one person to another?: Assumption of natural hair textures and decolonial notions of beauty and aesthetic sense of Black women*. EMA (Meeting of Marketing from Anpad).

Dussel, E. (2012). *Transmodernity and Interculturality: an interpretation from the perspective of Philosophy of Liberation*, v.1, n.3, p.28-59.

Ferguson, R. (2004). *Aberrations in Black: Toward a Queer of Color Critique*. Minneapolis: University of Minnesota Press.

Ferreira, M.; & Pereira, S. (2020). *Stigma of transsexual women and its consequences for consumption*. *Revista Brasileira de Marketing*, 19(4), 2020.

Foucault, M. (1977). *The History of Sexuality I: The Will to Knowledge*. Rio de Janeiro: Edições Graal.

Gonzalez, L. (1984). *Racism and sexism in Brazilian culture*. In: *Revista Ciências Sociais Hoje*, Anpocs, pp. 223-244.

Grosfoguel, R. (2008). *Transmodernity, border thinking and global coloniality*. Eurozine.

Hossmann, B.G.; Pessôa, L.A.G.P. & Pereira, S.J.N. (2024). *Beyond representation: A semiotic analysis of sapphic representativity in TV Globo soap operas*. *Sociedade, Contabilidade e Gestão*, 19(2). https://doi.org/10.21446/scg_ufrj.v19i2.61401

Jesus, C.C. de (2020). *History and Queer Theory: Possibilities at the Margins*. *Boletim Histori-ar*, 7(1), Jan/Apr, 2020, pp. 32-41.

Lauretis, T.D. (1991). Queer Theory: Lesbian and Gay Sexualities. *Differences: A Journal of Feminist Cultural Studies 3*, no. 3: iii-xviii.

Laurindo, C.R. (2020). *Bisexual identity constructions and heteronormative and homonormative matrices*. *Revista Brasileira de Estudos de Homocultura*, 3(10), Apr. – Jun.

Louro, G. L. (2004). *A Strange Body: Essays on Sexuality and Queer Theory*. Belo Horizonte: Autêntica.

Lugones, M. (2010). Toward a decolonial feminism. *Hypatia*, v.25, n.4, p.742-759.

Mariano, S. A. *The Subject of Feminism and Post-Structuralism*. *Estudos Feministas*, 13, pp. 483-505, 2005.

Mignolo, W. (2018). *On Decoloniality: Concepts, Analytics*, Praxis. Duke University Press.

Miskolci, R. (2007). *Queer Theory and the Question of Differences: Towards an Analytics of Normalization*. In: 16th BRAZILIAN READING CONGRESS, 2007, Campinas. *Proceedings...* Campinas: Unicamp.

Oyewumi, O (2004). Conceptualizing gender: the Eurocentric foundations of feminist concepts and the challenge of African epistemologies. In: African Gender Scholarship: concepts, methodologies and paradigms. Codestria: Dakar p.1-8.

Paniza, M. D. R. (2020). Between emergence, submersion, and silence: LGBT as a research category in Administration. Cadernos EBAPE.BR, 18(1), 13–27. https://doi.org/10.1590/1679-395173482.

Pereira, P.P.G. (2015). *Decolonial Queer: When Theories Travel*. *Contemporânea*, 5(2), Dec.

Pereira, P.P.G. (2020). *Pedro Paulo Gomes Pereira: Decolonial and Queer Bodies and Theories, Interpellated and in Transit*. *Revista Epistemologias do Sul*, 3(2).

Pedroza, Y.M.L.L. de A., & Diniz, P.R.J. (2022). *Queer Theory: A Revolutionary and Decolonial Space of Identity*. *Cor LGBTQIA+*, 1(2), 78-89.

Quijano, A. (2005). *Coloniality of Power, Eurocentrism, and Latin America*. In: LANDER, Edgardo. *The Coloniality of Knowledge: Eurocentrism and Social Sciences – Latin American Perspectives*. Buenos Aires: CLASCO, pp. 107-130.

Quijano, A. (2007). *Coloniality and Modernity – Rationality*. *Cultural Studies*, 21(2-3), pp. 168-178.

Rubin, G. (1984). Thinking Sex: Notes for a Radical theory of the Politics of Sexuality. In: *ABELOVE et. all. The Lesbian and Gay Studies Reader***.** New York: Routledge, 1984. pp. 3-44.

Sanchez, M.H (2014). *The construction of Heteronormativity in gay characters on the soap operas*. Novas Edições Aacadêmicas.

Santos, S. de O., Hossmann, B. G., Moura, R. G. de, & Pessôa, L. A. G. de P. (2024). Invisi(bi)lity: Where are the Studies on Bisexuals in Administration?. Cadernos Cajuína, 9(5), e249545. https://doi.org/10.52641/cadcajv9i5.685.

Santos, J.J.S. dos. (2023). *Queer Beyond Borders: Intersectionality and Decoloniality in the Reimagination of Queer Studies*. *Revista Sociologias Plurais*, 9(2), pp. 318-340, Jul.

Straayer, C. (1996). *Deviant eyes, deviant bodies: Sexual orientation in film and video***.** New York, USA: Columbia University Press.

Sedgwick, E.K. (1993). *The Epistemology of the Closet*. In: ABELOVE, Henry et al. *The Lesbian and Gay Studies Reader*. New York/London: Routledge.

Souza, E. (2017). *Queer Theory and Organizational Studies: Revisiting Concepts on Identity*. *Revista de Administração Contemporânea*, 21(3), May-Jun.

Souza, E.; & Carrieri, A. (2010). *Queer Analytics and Its Break with the Binary Conception of Gender*. *RAM, Revista de Administração Mackenzie*, 11(3).

Torres, I.L. de S.; & Fernandes, F.B.M. (2021). *Queer (NEO)colonial: Coloniality and Queer Theory in Brazil*. *Revista Gênero*, 22(1).

Tressoldi, C. (2023). Scientific production itineraries: LGBTQI+ research in marketing. Revista Administração em Diálogo - RAD, 24(1), 116-132, 2022. DOI: http://dx.doi.org/10.23925/2178-0080.2022v24i1.52966.

Von Hunty, R. *Roots of Homophobia: Rita in 5 Minutes*. YouTube, Apr. 2024.

Warner, M. (1993). *Fear of a Queer Planet: Queer Politics and Social Theory. University of Minnesota Press Minneapolis London*.

Race, Representation and Reality in UK Higher Education: Narratives from a London Business School

La Toya Quamina

Yasmin Kulasi

Kate Ingsa

Unvan Atas

Background

The participation and success of Black, Asian, and Minority Ethnic (BAME) individuals in higher education have garnered increasing research attention in recent years (e.g., Arday *et al*. 2022; George Mwangi *et al*. 2019; Osho 2025; Richards *et al*. 2023; Wallace 2022). Globally, the underrepresentation of BAME individuals in higher education is both a symptom and a cause of systemic inequities, perpetuated by structural barriers in educational institutions. In the United Kingdom (UK), this issue is particularly acute, where award and progression gaps among ethnic groups underscore the need for reform in both academic and institutional practices.

The awarding gap in UK Higher Education provides a stark illustration of these disparities. According to Advance HE (2022), 87.1% of white students received a first or 2:1 degree classification compared with 77.2% of BAME students, representing a degree awarding gap of 9.9%. The gap is even wider when comparing students awarded a first-class degree by ethnicity. While 38.9% of white students achieved a first-class degree, only 28.7% of BAME students reach the same benchmark. These disparities extend beyond grades; Nguyen et al. (2019) for example, noted that BAME students spend over 4% more time studying than their white counterparts. Similarly, Wong *et al*. (2021) found that even when controlling for prior attainment and socioeconomic background, BAME students face additional barriers as it relates to teaching and assessment, suggesting that possible systemic biases embedded in institutional structures, rather than individual effort, perpetuate the awarding gap.

BAME staff face equally profound challenges, including limited representation in senior roles and institutional cultures that marginalise their contributions (Rodriguez 2022; Omhand 2023). Advance HE (2022) also revealed that 89.7% of UK professors are white, with only 0.7% identifying as Black and 4.3% as Asian. Performance pressures, microaggressions, and a lack of support for professional development compound these inequities (e.g., Ishaq and Hussain,2022; Mahony and Weiner 2020) creating an environment where staff may struggle to

thrive. The intersection of these systemic issues creates a self-reinforcing cycle that stifles progress and exacerbates the challenges faced by both BAME staff and students, and the implications are profound. The lack of diverse representation of BAME staff at leadership levels limits the breadth of perspectives shaping institutional policies and practices (Burke, 2013). It can also affect engagement, belonging, and academic outcomes of students (e.g., Rana et al. 2022; Smith 2017), further widening the gap. Addressing these disparities is not only an ethical imperative but also essential for cultivating inclusive academic communities.

Despite growing interest and preliminary insights in this research area, the literature remains sparse, with only a limited number of studies to date examining the underrepresentation of BAME individuals in UK academia. This study seeks to bridge that gap by furthering exploration of the barriers and opportunities for racial equity in UK Higher Education. Specifically, it investigates the experiences of BAME students and staff at a London-based Business School, focusing on disparities in access, success, systemic barriers, and psychological challenges. Recognising that each institution has its own unique culture, structures, and challenges, it is crucial to first examine these experiences at the institutional level. Institutional case studies—such as this one—serve as critical building blocks for understanding the nuanced barriers faced by BAME students and staff, providing a foundation for broader systemic change across UK Higher Education.

Proposed Methodology

This study employs a qualitative research design grounded in phenomenology to explore the lived experiences of 20 students and staff at a London Business School from a BAME background. Semi-structured interviews to be conducted in February 2025 will serve as the primary data collection method, offering rich insights into the participants' perspectives on psychological and systemic barriers. By engaging participants in reflective discussions about their experiences, the project aims to highlight the specific practices, policies, and cultural dynamics that hinder success. Thematic analysis will be employed to identify patterns and themes across the data, while findings will be contextualised within existing literature on race and higher education.

Expected Outcomes, Significance, and Implications

This study is expected to uncover the systemic and psychological barriers that impede the success of BAME students and staff in academia. For BAME students, the research will likely highlight the ways in which biases in teaching practices, assessment methods, and institutional policies contribute to attainment disparities among students, as well as the impact of exclusionary curricula and a lack of culturally responsive support systems on their academic experience and sense of belonging. For BAME staff, it will likely highlight challenges related to workplace culture, microaggressions, career progression, and underrepresentation in leadership roles. By shedding light on these structural inequities, the study will offer a nuanced understanding of how institutional practices shape the experiences and outcomes of BAME individuals in UK higher education.

The significance of this research lies in its potential to catalyse institutional reform by highlighting entrenched inequities and informing the development of more inclusive policies and practices. By identifying specific barriers to equity, the findings will provide this higher education institution with concrete, evidence-based strategies to improve access, support, and opportunities for its BAME students and staff. Beyond producing theoretical insights, the study's tangible deliverables, including a podcast series, an online course, and a documentary short film, will act as powerful, scalable tools to drive awareness, foster dialogue, and push for meaningful, lasting change.

Beyond its immediate institutional context, the impact of this research extends across the UK Higher Education sector. As UK universities grapple with the urgent need to uphold their equality, diversity, and inclusion (EDI) commitments, this study will provide a critical evidence account that not only highlights the scale of racial disparities in higher education but also offers replicable, actionable frameworks for fostering inclusivity and equity across the sector. By tackling systemic inequities at both institutional and sector-wide levels, this research contributes to the broader societal imperative of dismantling racial barriers in academia and advancing societal goals of equality and justice.

References

Advance HE (2022). *Ethnicity awarding gaps in UK higher education in 2019/20*. Retrieved from https://advance-he.ac.uk/knowledge-hub/ethnicity-awarding-gaps-uk-higher-education-201920. (Last accessed: Jan 7, 2025).

Arday, J., Branchu, C., & Boliver, V. (2022). What do we know about Black and minority ethnic (BAME) participation in UK higher education? *Social Policy and Society*, *21*(1), 12-25.

Burke, P. (2013). *The right to higher education: Beyond widening participation*. Routledge.

George Mwangi, C. A., Changamire, N., & Mosselson, J. (2019). An intersectional understanding of African international graduate students' experiences in US higher education. *Journal of Diversity in Higher Education*, *12*(1), 52.

Ishaq, M., & Hussain, A. M. (2022). BAME employees' work experience in the UK public sector: An empirical study of academic and research libraries. *International Journal of Public Sector Management*, *35*(3), 334-348.

Mahony, P., & Weiner, G. (2020). 'Getting in, getting on, getting out': Black, Asian and Minority Ethnic staff in UK higher education. *Race Ethnicity and Education*, *23*(6), 841-857.

Nguyen, K. T. (2019). *Impacts of Structural Racism on Psychological Well-Being: A Systematic Literature Review and Qualitative Study* (Doctoral dissertation, Adelphi University).

Omhand, K. (2023). The race to the top: the experiences and strategies of women of colour in UK academia.

Osho, Y. I. (2025). Guest editorial: Racially minoritised women academics in the global academy. *Equality, Diversity and Inclusion: An International Journal*, *44*(1), 1-8.

Rana, K. S., Bashir, A., Begum, F., & Bartlett, H. (2022, May). Bridging the BAME attainment gap: Student and staff perspectives on tackling academic bias. In *Frontiers in Education* (Vol. 7, p. 868349). Frontiers Media SA.

Richards, K., Pilcher, N., Galbrun, L., Forster, A., & Richards, J. (2023). Diversity and inclusion in UK Higher Education: staff perspectives on institutional representations and their reality. *Research in Post-Compulsory Education*, *28*(4), 647-669.

Rodriguez, H. (2022). Workforce Race Equality in UK Higher Education: An Exploration of the Differential Outcomes for Black Staff.

Smith, S. (2017). Exploring the black and minority ethnic (BME) student attainment gap: what did it tell us? Actions to address home BME undergraduate students' degree attainment. *Journal of Perspectives in Applied Academic Practice*, *5*(1).

Wallace, J. K. (2022). Nevertheless, we persist: Exploring the cultural capital of Black first-generation doctoral students at non-Black serving institutions. *The Review of Higher Education*, *45*(4), 515-548.

Wong, B., ElMorally, R., & Copsey-Blake, M. (2021). 'Fair and square': what do students think about the ethnicity degree awarding gap? *Journal of Further and Higher Education*.

Racism at the Point of Sale and Its Impact on the Shopping Experience of Black Consumers in São Paulo

Denise Pereira dos Santos

Patricia Santos

Jéssica Marinzeck

Isabella Cacace Gomes

Ricardo Zagallo Camargo

Roberta Dias Campos

Introduction

Black consumers in Brazil have an annual purchasing power of 1.9 trillion reais, representing 54% of the Brazilian population and 40% of the consumer market (PNAD 2022). Their needs, values, and experiences are neglected, contradicting fundamental marketing principles related to customer satisfaction and brand relationship building. This exploratory qualitative study investigates racism experienced by Black people at points of sale in a shopping mall in São Paulo, Brazil, seeking to answer the research question: What is the impact of racism at the points of sale on Black consumers' purchasing behavior?

Theoretical framework and Literature Review

Racism Theories and Marketing Practices

Fanon (2008) explores the psychological impacts of racism on the identity construction of Black individuals, who often face dehumanization in social and consumer spaces. Silva Junior (2016) reveals how racial prejudice affects Black consumers in Brazilian retail, showing that discriminatory experiences generate distrust in brands and profound impact on purchasing behavior. Bento (2022) identifies the "whiteness pact"- a tacit agreement among white individuals to maintain their privileges. Harris et al. (2005) explore the concept of racial profiling, which involves excessive surveillance and differential treatment at the point of sale. Poole et al. (2020), operationalizing Critical Race Theory (CRT) in the market, highlight how consumption can be a space for racial exclusion. Johnson et al. (2019) examine how marketing practices perpetuate inequalities and marginalize Black consumers.

Point of Sale and Selective Demarketing

Pittman (2017) reveals how Black consumers face racial stigma and discriminatory practices in retail environments. Casaqui (2006) discusses how shopping centers reinforce symbolic barriers that reflect social and economic inequalities. Francis and Robertson (2021) suggest the concept of white spaces to designate marketing practices that will strengthen inequalities and alienate Black consumers at the point of sale. Rocha and Casotti (2017) introduce the notion of selective demarketing, which operates covertly to exclude Black consumers from markets, reinforcing symbolic barriers and perpetuating discriminatory practices.

Methodology

This qualitative and exploratory study aimed to understand the experiences and perceptions of Black consumers regarding racism in shopping malls in São Paulo. The research was structured in two phases: observations and brief conversations, followed by ten in-depth interviews.

Table 1 – Participants profile

Interviewee	Gender	Age	Occupation	City of residence
1	Man	40	Visual Artist	São Paulo city
2	Woman	41	Sommelier	São Paulo city
3	Woman	27	Accountant	São Paulo city
4	Woman	42	Manager	São Paulo city
5	Woman	38	Doctor	Arujá city
6	Woman	33	Engineer	São Paulo city
7	Woman	45	Lawyer	Piedade city
8	Woman	31	Graphic designer	São Paulo city
9	Woman	30	Advertising person	São Paulo city
10	Man	40	DJ	São Paulo city

Ethical Considerations

Throughout the research process, ethical precautions were taken, such as obtaining the consent of all participants, ensuring anonymity and confidentially storing the interview recordings.

Data Analysis

The data analysis has three stages: 1) Transcription of the interviews, preserving the richness of details and nuances of speech; 2) Analysis from emerging themes; 3) Data Triangulation of the data collected in observation, brief conversations, and in-depth interviews.

Results and Discussion

Observation with brief conversations

The observations occurred at Shopping X, near Avenida Paulista, one of the city's main financial and cultural centers. Among the ten stores visited, there were two jewelry stores, one wine store, three beauty and perfume stores, one electronics store, one hair salon, and two clothing stores. The following findings were collected: I) Environment: some efforts toward diversity were noted, including visual communications, featuring images of Black people; II) Store Service: some brands showed concern for the experience of Black customers; III. Frequency of Black People: Black people as consumers were nearly nonexistent in the mall. However, black individuals were significantly present as workers, reflecting a clear segregational share of space (Santos 1979).

In-Depth Interviews

Most participants, regardless of gender and skin tone (both dark-skinned and light-skinned Black individuals), reported experiencing racism in shopping malls. Some recounted incidents dating back to childhood and adolescence, which made them aware of racism's existence and severity. Common experiences among interviewees who perceive and experience racism in shopping centers reveal undeniable racist patterns, grouped into five categories: I) Discomfort in High-End Malls and Stores: there is a shared perception of increased hostility in shopping centers and stores catering to high-income customers; II) Neglect in Customer Service: it is a recurring issue, with Black customers perceiving disparities compared to white customers; III) Security Surveillance: being followed by security guards is a common experience, contributing

to a feeling of constant surveillance and suspicion; IV) Implicit or Subtle Racism: experiences that are manifest through microaggressions, judgmental stares, and indifferent service; V) Violence Against Black Men: Black women face racism intersecting with sexism (Carneiro, 2011) and Black men experience more explicit and violent racism.

Experiences of racism in shopping malls not only reveal the persistence of discriminatory practices but also highlight at least four reactions: I) Visiting shopping malls they are already familiar, avoiding malls catering to high-income individuals; II) Adjusting appearance to mitigate prejudice and the possibility of experiencing racism; III) Avoiding spaces where they experienced racism; IV) Sharing the experience with Close Contacts or on Social Media; V) Avoiding physical stores and preferring online channels.

Final considerations

Racism at the point of sale in shopping malls in São Paulo persists in various forms, often subtle and only perceived by those who experience it. This ongoing work offers four potential contributions: 1) a marketing contribution by enabling access to an audience that is currently ignored or underserved by companies; 2) an educational contribution by raising awareness among company employees about racism at the point of sale; 3) a consumerism contribution by restoring access to the in-person shopping experience for Black consumers; and 4) a social contribution by addressing recurring and unacceptable situations from any perspective.

References

Bento. C. (2022). *The Whiteness Pact*. São Paulo: Cia. das Letras

Carneiro, S. (2011). *Racism, Sexism, and Inequality in Brazil.* São Paulo: Selo Negro.

Casaqui, V. (2006). *Meeting points: shopping centers de São Paulo*. Communicare, São Paulo, 6 (1).

Fanon, F. (2008). *Black Skin. White Masks*. Salvador: EDUFBA.

Francis, J.N.P., & Robertson, J.T.F. (2021). White spaces: how marketing actors (re)produce marketplace inequities for Black consumers. *Journal of Marketing Management*, *37* (1–2), 84-116.

Harris, A.M.G., Henderson, G.R., & Williams, J.D. (2005). Courting Customers: Assessing Consumer Racial Profiling and Other Marketplace Discrimination. *Journal of Public Policy & Marketing, 24*(1), 163–171.

Johnson, G. D., Tomas, F. K. D., Harrison, A. K., & Grier, S. A. (2019). *Race in the Marketplace: Crossing Critical Boundaries*. Palgrave-McMillan.

Pittman, C. (2020). “Shopping while Black”: Black consumers’ management of racial stigma and racial profiling in retail settings. *Journal of Consumer Culture*, 20(1), 3-22.

Poole, S. M., Grier, S. A., Thomas, K. D., Sobande, F., Ekpo, A. E., Torres, L. T., Addington, L. A., Weekes-Laidlow, M., & Henderson, G. R. (2021). Operationalizing Critical Race Theory in the Marketplace. *Journal of Public Policy & Marketing*, 40(2), 126-142.

PNAD (2022). *National Household Sample Survey***.** Indicadores IBGE.

Rocha, A. R. C., & Casotti, L. M. (2018). Selective and “veiled” demarketing from the perspective of black female consumers. *Organizações & Sociedade*, *25*(87), 610–631

Santos, M. (1979). *Divided Space: The Two Circuits of the Urban Economy in Developing Countries*. Rio de Janeiro: Francisco Alves.

Silva Junior, A. F. (2016). *Racial Prejudice and Discrimination in Retail: Consumers' Perceptions and Reactions*. Fundação Getulio Vargas.

Reflexive Decoloniality Means Boycotting the Myth of a Balanced Globalization System: Unsilencing the Indigenous Past of a Free People's Republic (1791-1825)

Jonathan Bowman

June Francis

This paper draws on the history of the Haitian Revolution, which took place between 1791 and 1804, and successfully saw formerly enslaved people in The French colony of Saint-Domingue defeat French colonial rule and enslavement. As the largest producer, along with Jamaica, of sugar, the dismantling of the plantation system had dramatic impact on the supply of sugar, which had become a staple on which Britain, France and other European nations relied (Sheller 2003, pp. 74-95; Smith 2002, pp. 90-103, 121-128). The paper draws on historical sources to illustrate how colonial narratives related to loss of sugar production would produce devastation for the provisioning organizations, marketing systems, and well-being of Haitians (Oswald 1999, pp. 303, 309; L'Ouverture, and Aristide, 2008).

We demonstrate through this history, even after the unprecedented historical achievement of a successful revolt against colonial rule (1791-1825), the ways in which entrenched control over the master narrative of globalization further exacerbated the issues facing Haiti. We conceive of globalization not in its popular form as only a recent phenomenon, but as a historic phenomenon (Banerjee, Carter, and Clegg, 2009). We show how these forces combined to devastate Haiti. Drawing on theories of decoloniality (Mignolo 2011; Said 1993; Baptista and Hemais 2024), decolonization (Hemais and Santos 2021; Banerjee 2021; Eckhardt et al 2022; Francis 2023; Francis and Mugabo 2025), post-colonialism (Jack 2008), and indigenous epistemologies (Greeff 2023; Daut 2023, pp. 31-49), we proceed methodologically from a range globalization from the perspectives, positions, and points of view of those most adversely affected and most intensely traumatized in sustaining these hegemonic systems.

This paper first uses three early modern examples of British (1791), French (1792), and American (1804) boycotts of select supply-chain segments of the emergent transatlantic marketing system to show the ways in which globalization (even in domains of surface appearance of moral and social progress) was simply a continuation of the exploitative relationships that were started in colonization and enslavement. It then looks at how this impacted the way these same powers reacted to Haitian systemic attempts to disrupt how these markets worked globally as well as the institutional arrangements that surrounded this. We then

argue for a fissure that looks at a new imagining. Breaking these historical structures must be done through centering new imaginations (Said 1993, pp. 278-281). New manifold perspectives must address institutional disparities, dismantle the stranglehold on power at all institutional levels, and reinvigorate narratives of historical resistance that have been suppressed for centuries.

The paper is structured as follows. First, we briefly describe the critical events of the French revolution and its aftermath, focusing on the disruption of marketing supply chain and provisioning systems. We then draw on the responses by European imperialist and Colonial powers who present competing narratives in their domestic explanations for how disruptions in supply chains affected their varied nation-building projects. Next, we center indigenous Haitian sourcing for more detailed expositions on how global provisioning system of commodities like coffee and sugar that depended upon the vicious colonial trade in persons were inherently unsustainable. For this, we appeal to Haitian intellectuals De Vastey, James, and Trouillot as articulate representatives of hybrid identities. As each were part of different stages of the Haitian diaspora, each were immersed in the educational privileges of a metropole (Paris, London, New York, respectively), offering voice to other diaspora testimonials from the periphery. Each stage of historical retelling contains the constant theme of material participation in emergent global marketing systems always carries with it a new wave of transformation of emancipatory ideas and ideals attached to the original 1804 Principle (Daut 2023). We conclude with a gesture to the bicentennial celebration of Haitian recognition as a sovereign self-governing people as an occasion to reassess the viability of its decolonial legacy as a template for a functional decolonial marketing in the present.

The French Revolution and Impact on Sugar Supply

With the French Revolution came the concomitant 1789 Declaration of the Rights of Man and Citizen. It would be too simple to characterize the 1791-1804 Haitian Revolution as merely an extension of the spirit of the 1789 French revolutionary achievements since much of what ensued led to tumultuous domestic and global debates as pertains to who qualifies as ‘man’ and who ‘citizen.’ Suffice it to say, it is not within the scope of this survey to highlight the crucial historical blind spot to the characterization of rights of man and citizen from their onset to exclude the great part of the human population of women. For the immediate purposes, the hasty assumption that the declaration of the rights of man precludes enslavement in the West Indies

would ignore the dominant European ideology of a racial ontology assuming the superiority of whiteness, the questionably humane status of those of mixed race, and the consensus that those of African and Indigenous descent were less than persons.

Since the Declaration extends to man *and* citizen, there is the distinct but related concern over one's status as citizen. This debate occurred most urgently at the precise intersection of the colonial trade in sugar and merchants of French and Saint Dominque mixed race status. While the mixed-race category of merchant sugar trader was in broad agreement that those of pure African descent were non-persons and thus not true candidates for citizenship, their own interests in maintaining voice to defend their own rights to property and free exchange led to disputes over their political (and ontological) status as mixed-race persons on both sides of the transatlantic trade network (Bowman 2023). As this contingent sought proportionate representation in the French Assembly, the initial calculus behind their claim to twenty representatives included the curious inclusion of the slave population in Saint Domingue as part of the justification for their sizable contingent sent from the West Indies to the Paris assembly hall. Reluctant to grant proportionate representation on these terms, France saw it in their national interest to allow a smaller number of four representatives. This conferral of partial rights of citizen was given on the condition that these Assembly representatives would return to Saint Domingue and aid in ensuring that the more populous proportion of those enslaved did not ever see any claim to these newly granted rights of man to freedom and equality realized.

In sending Haiti's own diplomatic delegation back to France on a naval vessel, since the number of white French military men in that return voyage outnumbered those of mixed-race (at least one contingent in unanimity on the slavery question rejecting personhood), the larger white delegation included an internal ideological divide. On the one hand were those of a royalist aristocratic sympathy who were set on maintaining the lucrative slave trade. On the other hand, were an equally-balanced contingent of lower-class mercenaries with convictions that the 'aristocracy of skin' threatened their own newfound expansion of rights to liberty and equality. A successful landing back at the sugar plantations of Saint Domingue did not make things any less complicated.

The local military elite of Saint Domingue, in not trusting France to recognize even its white and mixed-race contingent as full republican citizens (let alone the enslaved that comprised the vast majority of domestic population and labor), immediately sided with Spanish naval forces.

This Spaniard military enclave was also contending for the colonial spoils of Saint Domingue. In a deal with the Saint Domingue military elite, they exchanged a promise of conferred recognition as citizens of Spain if agreeing to serve as co-protectorates of its military claims to the commodity-rich territory with its lucrative sugar wealth as source of its power.

As the French contingent began suffering loses to Spain, some of its more egalitarian-spirited mercenaries saw that the furthering of the 'blood aristocracy' by France was not a worthy cause to die for defending. Since the French were losing morale and losing their claim to this colonial sugar treasure, the nearby naval powers of yet a third colonial power, England, busy policing its own territorial interests in the West Indies saw an opening to claim at least some or all of the lucrative island for their own exploit. England's contingents wore the outward badge of pledging professed allegiance to the rights of man to cater to the wider Saint Domingue populace's growing domestic abolitionist sentiments. England's military also served as propagandists spreading pamphlets pertaining to these new rights of deliverance from bondage as a strategic means to sew native dissent.

As the more aristocratic-leaning French military leaders saw the growing threat of losing the entire colony to the confluence of local resistance and the new opening of a dual front against English and Spanish assault, they found their last best hope in the offer of military assistance from Toussaint L'Ouverture. As a Saint Domingue leader with immense populist support, he extended this offer of conciliation in exchange for recognition of his fellow colonial inhabitants as French inheritors of the crucial claim of citizenship needed to proclaim the rights of man. Although Toussaint at the time of this offer was fighting for Spain (to stockpile armaments for potential use against the French), he foresaw that Spain's own treatment of its other West Indies holdings carried little prospect of improving the aggregate well-being of the mass if enslaved laborers of Saint Domingue whom he regarded as his true compatriots.

As Toussaint's military strategy, leadership, and battle prowess brought him a crucial run of victories in his new role as a French officer, he was gradually able to shore up the support of Saint Domingue's assortment of mixed-race merchants, white plantation owners, and African slaves into a united front. Since each victory brought him greater status in the official French military ranks, he was able to leverage his position as second in authority to the top official (Sonthonax) to disclose his own true ambitions as a black Spartacus of sorts, a fabled a man of African descent for bringing an end to the 'aristocracy of the skin' (James 1989, p. 250).

In seeking to realize the original French Declaration of the Rights of Man and Citizen in its most robust formulation, Toussaint had gained enough status and accolade that Napoleon himself send a delegation to bring Toussaint and his family back to 'their new home' France. Toussaint agreed in exchange for the promise of a truce that would end slavery and end the colonial monopoly on Saint Domingue's lucrative plantation profits (James 1989, p. 203). Although it is clear that the children of Toussaint were leveraged as collateral to get him to leave the island, he parted ways with his captors with the following words: 'In overthrowing me, you have cut down in San Domingo only the tree of liberty. It will spring up again by the roots for they are numerous and deep.' (James 1989, p. 334).

Since word of Toussaint's valor in sacrifice, diplomacy in leadership, and hope for liberty was impossible to suppress, his brave exit ensured the spirited support of both his military successors and the vast populace of laborers. As such, his capture solidified the momentum of revolutionary fervor spreading throughout the colonial island as plantation laborers began unfolding the biggest labor rebellion that world had seen to that point (Du Bois 1904). Following his arrest in 1802, his imprisonment and death in 1804, it took only until 1804 for the Haitian Revolution to have realized the promise of the 1789 Declaration of the Rights of Man and Citizen. The combination of plantations deserted, military victory secured, and three colonial foes overcome, Saint Domingue was birthed as a constitutional republic (originally drafted by Toussaint) that granted rights to citizenship, liberty, and equality to all natural-born inhabitants, regardless of race, position, or color.

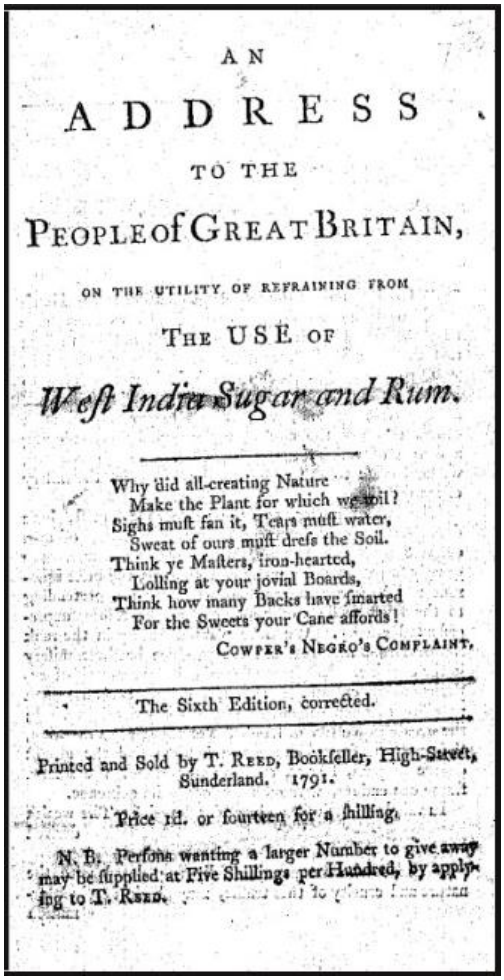
Four Narrative Spins to Early Modern Boycotts of the Globalized Sugar Trade:

How Contrapuntal Analysis Can Transition the Coloniality of Power to Political Marketing

Edward Said's reflections on the *sui generis* character of Haitian and Caribbean literary renditions of the Haitian revolt (1791-1804) contrast sharply with British, French, and American narrative portrayals of the same event(s). We will first provide a cursory overview of Said's reconstruction, drawn from his *Imperialism and Culture* (1993), to show how he offers a viable theoretical framework for bolstering our case-based argument that the onset of a globalized modernity continued exploitative relationships that were started in colonization and enslavement (Said 1993, p. 22; Francis 2021; Francis 2023). Particularly telling is the political role that marketing system boycotts had in the construction of nation-building narratives (Vorster et al 2020) and in the mobilizing of competing political ideologies (Fernandes 2020). While each of the

British, French, and American historical reconstructions of the Haitian revolt had a characteristic mode of deflecting attention away from the systemic boycott Haiti successfully achieved, they nonetheless coopt portions of that revolutionary narrative in manners that best support their own nation-building projects (Shebil, Rasheed, and Al-Shamari 2011).

From the British vantage, its literary traditions reconcile its colonial complicity in the globalized trade of sugar (that required the simultaneous global trade in persons), with a strong emphasis on the role that abolitionist sentiments in England ended up contributing to its recasting of itself as having landed on the right side of history. The 1791 pamphlet of Samuel Fox constructs a vivid portrayal of the atrocities of the colonial system (see Figure 1 below), essentially constructing a calculus for assigning each pound of sugar consumed to its equivalent in human flesh (which he approximated at 2 ounces) lost to this monstrous mode of production. Fox's calculus runs even further (and more grotesque) as he calculates that one family abstaining from the consumption of 5 pounds of sugar per week for 21 months would amount to the equivalent of salvaging one person's life. In Fox's terms, consuming sugar was an overt act of consumer participation in cannibalism (Van Dyk 2021; Sheller 2003, pp. 88-95).



AN

ADDRESS

TO THE

PEOPLE of GREAT BRITAIN,

ON THE UTILITY OF REFRAINING FROM

THE USE OF

West India Sugar and Rum.

Why did all-creating Nature
Make the Plant for which we toil?
Sighs must fan it, Tears must water,
Sweat of ours must dress the Soil.
Think ye Masters, iron-hearted,
Lolling at your jovial Boards,
Think how many Backs have smarted
For the Sweets your Cane affords!

COWPER's NEGRO's COMPLAINT.

The Sixth Edition, corrected.

Printed and Sold by T. REED, Bookseller, High-Street, Sunderland. 1791.

Price 1d. or fourteen for a shilling.

N. B. Persons wanting a larger Number to give away may be supplied at Five Shillings per Hundred, by applying to T. REED.

Figure 1

As the most-read pamphlet of the 1800s to that point, the publication date of the pamphlet directly corresponds with a reappropriation of the 1791 date usually ascribed to the official onset of the Haitian revolt (Daut 2015).

What is missing from the English grand-narrative for its role in the initiation of a globalized modernity would be the perspective offered by coloniality as always already embedded within a wider matrix of global power. For Said, one narrative constant to English literary traditions (like celebrated author Jane Austin) would be the unquestioned premise of imperial expansion as taking it as established fact in a globalized world that the sun would never set on the British empire (Said 1993, p. 87-97). Said uses the example of *Mansfield Park* presuming as its backdrop for its status proprieties the colonial enclave in Antigua. Extended to the case of Saint Domingue and petitions to steer popular attention elsewhere in the Caribbean, on the one hand, while Quaker and Baptist abolitionists called for the end of transatlantic slavery, English colonization of India was simultaneously providing them with new fresh markets to exploit (Said 1993, pp. 245-251). On the other hand, as Saint Domingue (then under French colonial rule)

provided over 60% of the coffee traded throughout Europe and 40% of Europe's sugar, any public attention brought to the atrocities of the plantation labor system was also conveniently an imperial exercise of power against the dangerous rise of France as colonial rival in wealth and power (Said 1993, p. 90). In addition, as the United States saw its birthing with its enslaved population as 3/5 of persons with non-voting powers, English colonial interests also were aligned with stoking abolitionist sentiments through alliances with American Quakers, Baptists, and abolitionist movements so as the stifle the growth and prosperity of these lost colonies (Van Dyk 2021).

From the French vantage, its most popular boycotts of the transatlantic trade in sugar came in 1792 in the form of domestic female consumers (Sheller 2003, pp. 94-95). These boycotts initiated from the metropole (in contrast to the simultaneous systemic boycott of trade in persons on the other side of the Atlantic). The French boycotts stemmed from the sheer economics of colonial supply and demand calling for the doubling of prices in sugar at a time when the Haitian revolt inconveniently disrupted the metropolitan rise of modern cultural norms of respectability (Rosa-Salas and Flower 2020). The colonial introduction of such luxuries as sugar for household proprieties around tea, coffee, and meals came to regard these practices as entailing staple necessities for the public and private praxis of new norms of modern consumptive expression (Smith 2002).

In contrasting the two European cases thus far, despite the near temporal simultaneity, their rationales could not be more distinct. The French variant to the boycotts ran on the justification of marketplace riots on the (false) ground that merchants were engaging in price speculation and gouging (Van Dyk 2021). This was not a matter of historical revisionism insofar as the average French consumer was relatively unaware of the radical extent of their dependence on Saint Domingue for its slave-mediated methods of commodity production that allowed for prices to stay low and commodities markets to tolerate wider scales of popularized consumptive abundance. In other words, in sharp contrast to the English boycotts, the French domestic boycotts were grounded in a real belief that the rise in prices was not a direct reflection of the transatlantic trade in persons as the necessary condition for efficient global provisioning systems.

From the perspective of coloniality, while much of French nation-building narratives and concomitant reconstructions of the birth of modernity point to the 1789 French Revolution in the ideals of the rights of man (Daut 2015, pp. 49-72), the enormous wealth

produced by Saint Domingue was the historical condition for the rise of an aristocratic class that was vying for power and prestige against monarchical sentiments (Nesbitt 2008; James 1989). In brief summation to this point: Said contrasts the English approach to coloniality as a march to global territorial empire while the French approach, for him, attests more to a cultural imperialism that seeks to import its ideals, traditions, and mores globally and extract exotic foreign goods as part of that aggrandized self-presentation (Said 1993, pp. 97-100).

From the vantage of the United States, in contrast to the European boycotts on the front end, its boycotts of the globalized trade network with Haiti came at the tail end of the 1791-1804 dates that bookend the Haitian revolt. While the English boycott was driven by the nation-building project of shaping popular sentiment through pamphlets and the French boycott was taste-driven to the point of riots over pricing, the boycott from the United States came through the firmer hand of Congressional legislation (Du Bois 1904). A series of Acts of Congress in 1804 were passed that collectively sought to suppress the flow of information concerning the consummated success of the revolt in the global public sphere (Du Bois 1904). This series of legislative acts that called for the halting of all trade with Haiti ensured rewards to civilian vessels aiding in the legally-enforced commandeering of boats from suspected Haitian origin.

In contrast to the English drive for colonial land empire and the French spirit of cultural imperialism, Said finds that the United States' variant on its historical projects of nation-building imperialism had more to do with the bricolage assortment of often contradictory modes of strategic interference into the foreign policies of any colonial partner in global trade (Said 1993, pp. 288-290). For Said, while he does not see any overarching cultural messaging that remains consistent over time, he does find the historical constant of a variation of colonial imperialism driven by what is judged to be most in accord with United States' trade interests, domestic stability, and general presumed license of natural right to appropriation to others' sources of wealth. We see both of these in the legislative acts that render it a matter of unlawful commerce to allow for interaction with Haitian vessels. On the one hand, as the United States struggled with its own attempts to quell slave revolts within its own growing plantation system (Francis 2023, p. 564-565), fear that word of a successful revolt might motivate domestic slaves led to concerted suppression of any news that might embolden these emancipatory aspirations (Du Bois 1904). For Congressional and state legislatures, this was reason enough to prohibit trade in goods that could stimulate word of mouth trade in unpatriotic ideas. On the other hand, the designation of

such market exchange as unlawful on paper began, for Said, to shape a longer United States legacy of colonial practices of very fluid renditions of strategic national interest (Said 1993, pp. 285-288). Whether or not actual practices accorded with the letter of the law became a matter of unprincipled contextual nuance in the ongoing project of a nation-building ideology of unchecked market expansion with the aim of perpetual growth.

In comparison to the English, French, and American modes of modern nation-building as the colonial exploit of globalized marketing systems, what Said finds most uncanny about the Haitian mode of nation-building narrative is its mode of boycott as disruptive of the entire global imperial system (Said 1993, pp. 256-257). It is not a mere piecemeal grievance over whom to exploit most (English), pricing (French), or suppression of ideas (US) but a rejection of the entire terms of empire that had come to legitimate the unconscionable global trade of persons. In contrast, the three Anglo renditions of globalization only allow for system disruptions insofar as they still permit the continued conflation of maturation into modernity with the perpetuation of colonialism in its variety of forms into the present (Touzani, Hirschmann, and Smaoui 2016). As a gesture to the priority of the Haitian mode of complete disruption of empire, Said emphasizes the common strand to the European/American shared long-term trajectory of seeking to perpetuate performatively unsustainable marketing systems (Crockett 2022; Said 1993, 279-280). Their repeated calamitous failures serve for Said as empirical evidence for why the Haitian nation-building narrative of an autonomous, self-legislating, sovereign, and anti-colonial people stands out as a greater historical achievement than the Magna Carta, French, or American Revolutions (Said 1993, pp. 214-215).

In summative terms, Said champions contrapuntal analysis as his preferred methodology for balancing a negative critique of imperialisms in their varied English, French, and American nation-building formulations with the positive program of what, for our purposes, might comprise an actionable anti-imperial and decolonial marketing (Said 1993, pp. 66-67, 279-281). He sees his methodology as literally entailing the playing of multiple overlapping melodies at the same time in polyphonic symphony. As a contribution beyond the view of the coloniality of power as mere modicum of critique, Said's appeal to narrative and performative aesthetics counter-balances these three aforementioned colonial master-narratives with the epistemic and aesthetic priority granted to (in this case) the Haitian anti-colonial narrative. Epistemologically, in its portrayal of

the full 'context of the context' it proves more complete (Askegaard and Linnet 2011), aesthetically more resonant, and ethical-politically, more transformative.

The Significance of the Endogenous Voices of De Vastey, James, and Trouillot: Unveiling, Retelling, and Silencing Testimonial Witnesses to the Coloniality of Power

The appeal of the following corpus of narrative reconstructions of Haitian collective memory as a driver of emancipatory change, selects these three authors as endogenous voices respectively crossing over into their hybrid French (De Vastey), British (James), and American (Trouillot 1977; Jonassaint 2021) colonial inheritances. This locates the spirit of Said's narrative reconstructions deploying contrapuntal analysis directly in the hybrid experiences of authors at the liminal bounds of metropolitan center and subaltern periphery. The appeal to each author in historical sequence does not pretend to do full justice to the scope of their monumental academic and cultural contributions. Instead, for reasons of space, our aim is to highlight how each author looks at how the matrix of power we call coloniality impacted the way Haitian systems marketing worked globally as well as the colonial and imperial institutional arrangements that surrounded this (Baptista and Hemais 2024). As part of the schematic reconstruction, we also take liberty in categorizing the sequence with De Vastey as unveiling the logic of coloniality as a functional marketing system, James as retelling a story that had risked appropriation by European intellectuals that characterized the revolt in manners slanted to the modernist grand-history of Western globalization as progress, and Trouillot as detailing the conditions for the prolonged silencing of the Haitian revolt due to its running contrary to the colonial logic of history as what must have happened (instead of what really did happen).

Of Baron De Vastey's twelve manuscript-length works, the one most germane to our present purposes would be his 'Colonial System Unveiled' (De Vastey and Bongie 2014/1814). As the Parisian-educated child of a White Frenchman and a free woman of color from Haiti, De Vastey drew upon both Indigenous sources and European scholarship for his historical research on unveiling the colonial logic that confined Haiti and then led to its necessary resistance to crimes against humanity. While eminent historians of marketing often classify nation-building projects from the United States as the origins of using boycotts of colonial trade in goods as an innovative economic strategy for wielding global power (Witkowski 1989), De Vastey traces the phenomena of resistance by abstaining from the terms of exchange back at least to 1525 to indigenous resistance to the trade in persons as goods.

De Vastey shows a vast appreciation of historical and archival work in demonstrating that the culmination of the 1804 revolution and then the 1825 achievement of Haitian recognition by France was the product of at least three centuries of narrative resistance to the confluence of coloniality with the transatlantic slave trade. As such, De Vastey shows that the Haitian success was a mixed solidarity of those indigenous to Africa having been forced to endure the Great Passage, those indigenous to the Americas that engaged in documented resistance to the son of Columbus as early as 1521 (Daut 2023, pp. 44-45), and those indigenous to Haiti as inter-generational mixes of this confluence of forcibly displaced persons (Oswald 1999). For De Vastey, even the renaming of Saint Domingue as Hayti with the 1804 revolt was a gesture back to the indigenous heritage of the land with the name literally meaning populated mountainous land, or people of the land of mountains (Daut 2023, pp. 34-35). In this respect, as a variant of nation-building marketing systems, the origin of the people as a self-governing collective pays homage to this important direct tie between and indigenous people and the land that remains inseparable from their identity constitution.

While it would be common sense to read the French notion of the innate rights of man and its republican heritage back into the narrative of the Haitian revolution, De Vastey also extends this hybrid narrative back to the indigenous roots of maroon-nation resistance to the earliest origins of colonial dispossession as what he terms a crime against humanity (Daut 2023, pp. 63-64, 102-103, 117-118). In his 'Unveiling of the Colonial System,' he introduces the empirical practice of naming specific persons, administrators, judges, and governors personally responsible for genocide and crimes against humanity (De Vastey and Bongie 2014/1814). As further testimony to his scientific and empirical rigor, he also takes great care to name specific families, persons, and historical communities devastated by genocidal practices including but not limited to those suffering death to harsh enslavement. In sum, although De Vastey might be characterized in some academic circles as a French historian, his real contributions come in the empirical justification that the origin of crimes against humanity and protections of the rights of man realized had their highest historical expression in the Haitian revolt.

While De Vastey exerted grounds against the notion of French cultural supremacy with his detailing of Haitian indigenous excellence in matters of achieving humanistic aims, H.L.R. James (1901-1989) as a Trinidadian historian had lived much of his child and adult life under British colonial rule up to 1962 (James 1989, pp. 411-413). James' great work *The Black Jacobins* offers

a comprehensive retelling of the story of the great Haitian revolt in a manner unstained by European historical bias. James characterizes the role of the transatlantic slave trade as indistinguishable from the colonial rise of France to global imperial might by virtue of Saint Domingue as the most profitable colonial exploit in human history (James 1989, p. 46). James (writing as a Trinidadian subject of British colonial rule) reconstructs how the abolitionist sentiments that began to grow in England in the late 18th century was more the product of economic interest than Christian humanism. On the one hand, he points out that the first East Indian shipments of sugar arrived in Britain from Bengal in 1791 where 'Indian free labour cost a penny a day' (James 1789, pp. 52-53). On the other hand, James also clarifies that more than 50% of British slave trade in the West Indies amounted to purchases from France that stirred on the growth of the Saint Domingue wealth. James documents that the willful propagandizing of the British abolitionist cause into French intellectual circles was a political strategy of imperial nation-building spread under the ruse of humanitarian sentiment (James 1989, pp. 53-54)

In addition, he shows that the complexity of the scheme of division of labor that went into the sugar plantation industrial process housed on Haitian soil far exceeded the maturity of any extant production system contemporaneous to these innovations abroad in Europe (James 1989, p. 392). As such, since the labor was conducted, managed, planned, and executed by Haitian minds and bodies, their supply chain innovations, merchant expertise, and agricultural industrialization was the condition for the possibility of other innovations later in Europe and the Americas (and not the reverse). James and his egalitarian sympathies show how the Haitian revolt was truly a people's revolt made possible by commoners that knew their rights and put forth the most successful labor-induced revolt/boycott of the production system that the world had seen to that point (James 1989, p. 17-18). James' biographical sketches of Bookman, Toussaint L'Ouverture, Dessalines, Christophe, and others show a step by step reconstruction of out-strategizing, out-training, and out-smarting each in turn—defeating Spanish, English, and French aggressors in varied sequences of strategic nation-building political alliances.

As the most contemporary of our triad of indigenous Caribbean intellectual historians, although Trouillot (forcibly) grew up in the United States and taught at US universities, his *Silencing the Past* (1995) offers an intriguing thesis that the revolt was and is so easy to silence since it is and was unthinkable that a purportedly inferior racial ontology could accomplish such a momentous achievement. While academia associates Trouillot's great work with his *Silencing*

the Past, his own autobiographical and familial testimonies offer a counter-narrative of his first book—*Stirring the Pot: A History of the Haitian Revolution* (1977) as his own attribution of his greatest accomplishment (Jonassaint 2021). As a true testimony to the significance of an indigenous perspective on this narrative, Trouillot's insistence on authoring this first book in his native Creole attests to the importance he gives to language and collective memory as crucial to nation-building narrative (Oswald 1999, pp. 305, 307-308).

In a prolonged testament to the vital role of Creole to his prequel to the methods and mechanisms of historical silencing (1995), his original *Stirring the Pot on Haitian History* is constructed in a dialogical form whereby even the use of the you-plural construct (*Nuo*) to his hypothetical Haitian audience varies beyond its performative usage in the conventional first-person plural 'we' reference to the people as a collective. However, when the narrator intervenes to correct his hypothetical first-person plural audience in one or more instance of false historical self-understanding in need of correction, 'we' switches mid-narrative to a second-person singular 'you' to incorporate the reader in the pedagogical censure with some case specific uses of second-person plural 'you.' This shift in perspective signals to the collective audience that (along with the flow of the narrative into the present) must undergo a second-order critical reflection upon oneself. This complex epistemology of power in terms of point of view is distinctive to Trouillot (Daut 2023, p. 13). It arises particularly in instances where accurate self-understanding entails seeing oneself simultaneously from the perspective of the white colonial aggressor (as object) and autonomous individual (as subject). This empathetic projection is needed in order to self-correct the object-oriented glance that might regard persons of color or of overlapping heritages as categorical monoliths at odds with one's own hybrid-self-understanding (DeBerry-Spence and Izberk-Bilgin 2021; Oswald 1999; Daut 2015; James 1989, p. 18).

In addition to these innovative uses of narrative perspective-taking and critique, Trouillot introduces the *Kòd Noua* as the Creole equivalent of the Black Code. Troillot refers to De Vastey's own account of the origination of the *Kòd Noua* as the initial set of colonial laws exacted against indigenous persons that would rather face death than submit to coerced servitude. But in the Creole rendition, the literal translation comes off more picturesque (and belittling) since *Kòd* carries the duel meaning of set of (colonial) laws and the notion of a rope that binds one in bondage to the arbitrary whim of the colonial master. It is here that we find strong resonance

with our theme of globalization as an historical process directly entangled from its onset to a heritage of enslavement, colonial domination, and a global matrix of power.

One of the great insights from Trouillot for the coloniality of power as a system would be the duality inherent to the colonial system as a matrix of overlapping domination. On the one hand, Trouillot posits the tension between freedom and slavery. However, on the other hand, mere liberation from slavery may not overcome systemic domination since there is the second layer of independence versus dependence of the far-reaching colonies as an extension of the power of the metropole as the spatial locus of both administrative and commercial authority. In other words, for Trouillot, part of the rationale for the colonial interest in silencing the Haitian revolt is that it exemplifies a rare historical instance of liberation from slavery at the same historical moment as independence from colonial dependence (Trouillot 1995).

As tantamount to the indigenous legacy of tying self-determination and self-identity to the land, Trouillot introduces the notion of *potomitan* (something akin to stake in the ground or claim to this particular piece of land) as means to materialize normative ideals (Jonassaint 2021). While most accounts of the Haitian revolt circumscribe the dates as 1791-1804, Trouillot extends the historical vantage to 1825 as he employs the rare first-person plural to second person plural shift corrective to his intended audiences' point of view (Daut 2023, p. 13). While 1804 would constitute the date in history to mark victory over France, Trouillot advances a marked instance of archival critique of Toussaint L'Ouverture (for instance, juxtaposed to James' treatment of the same figure as a man absolutely without fault) since Trouillot viewed Touissaint as too complicit with the colonial system in his initial constitutional emphasis on all labor going to the state for use in colonial exchange. Trouillot critiques the earliest constitutions as too authoritarian insofar as they did not reserve the essential proportionate allotment of one's land for personal use and familial self-subsistence as immune from colonial trade. Troillot likewise ties the *potomitan* materialization of normative ideals to the significance of 1825 (which would make this year the bicentennial celebration) as the real historical accomplishment of colonial independence with the French recognition of Haiti as a sovereign self-determining state. Akin to the duality of freedom versus slavery and dependence versus independence, for Trouillot, a true instance of a decolonial provisioning system realized would require both independence from the colonial metropole and freedom to steward a portion of land in enjoyment of the fruits of one's labor (Jonassaint 2021).

The 1804 Principle as Fissure and New Imaginary for and by the People:

'Reflexive Decoloniality' Breaks Historical Structures by Centering New Imaginaries

The most recent archival scholarship on Haiti begins to make the turn from building upon the historical achievement of the past as a means for constructing a new social imaginary that could lends insights for decolonial marketing as a viable program. While research into marketing systems internal to marketing academia has begun to experiment with decolonial marketing models for Africa (Francis 2025), South Africa (Greef 2023), Brazil (Hemais and Santos 2021), and even parts of the MENA region like Tunisia (Touzani et al 2016), the outlines for a global template are still in development. It is our contention that the recent interdisciplinary scholarship of Marlene Daut's *Awakening the Ashes: An Intellectual History of the Haitian Revolution* (2023) offers a variation of what we take license to term 'reflexive decoloniality' as a distinctly Haitian epistemology for what a truly global decolonial marketing project might undertake (224).

In Daut's appeal to what she terms the 1804 Principle (Daut 2023, pp. 14, 120, 244-249), she draws on the archival documentation of Haitian early constitutional innovations. In this undertaking, she argues for a fissure in the Haitian project that looks at a new imagining. Since we agree with her that breaking these historical structures must be done through centering new imaginations, we turn to a summary outline of the new ground the 1804 Principle proposes.

On the one hand, the 1804 Principle as anti-slavery, anti-colonial, and anti-racist echoes much of the achievements that Trouillot noted in what was truly unique to the Haitian revolution. Daut agrees that there is a duality to freedom from slavery (in both the personal and collective sense of historical achievement) and independence from the colonial metropole. On the other hand, she sees inherent to the Haitian collective memory and constitutional praxis a commitment to anti-colonial as not just a domestic achievement of liberation from a metropole. For her, it also entails a global commitment to not engaging in any globalized marketing system that might entail subjection to colonial domination of any people group or subject (Daut 2023, pp. 211-246). In other words, she highlights instances in Haiti's checkered historical past where there was support for a nation as distant as Greece in its early efforts toward independence from the colonial bondage to Ottoman imperial rule (Daut 2023, pp. 240-243). Daut also notes comprehensive documentation of Haitian fiscal and diplomatic support for anti-conquest and anti-slavery abolitionist efforts in the United States (238-239, 244-246), Cuba (243-244), and in other slave-free states of Gran Columbia (Venezuela, Bolivia, Columbia, Ecuador, Peru, and Panama) that had undergone similar stages of independence from colonial rule (231-232).

What Daut has not explicitly named but would be a project worth considered would be the postulation of a potential collective of peoples committed globally to a truly reflexive 1804 principle of decoloniality as a new global system of power. The grounding framework would be something akin to the following: in order to engage in provisioning systems at a global scale, peoples and self-determining collectives that aspire to engage in this alternative mode of being and doing only provide material, diplomatic, and military support to like-minded nations and peoples aspiring to similar goals and aims.

Collective Memory, Endogenous Voices, and Maladi Non San as Aspirational Vision? New Views on Disparities, Dismantling Power, and Reinvigorating Suppressed Resistance

In conclusion, we look to concede limitations to this nascent project while we also outline some cursory managerial applications and proposed domains for future research. Since we would be remiss not to mention that new manifold perspectives must address institutional disparities, we return briefly to one concrete proposal recently endorsed by Daut (2020). She notes that Haiti originally was forced to pay 60 million francs in reparations to France for lost property (including slaves) and damages resulting from of its successful war of independence (1804) dating back to the 1838 'Traité d'Amitié' (Treaty of Friendship). Adjusting for inflation and interest over that period, according to Daut, amounts to a sizable payment of reparations—she argues that ought to be returned back to Haiti—which would amount to France owing Haiti 30 billion dollars (Daut 2020). While we concede that monetary and material reparations ought to be augmented with epistemic, restorative, and truth/reconciliation reparations (Khan, Rafi, and Naguib 2019), since we have already tied the materialization of normative ideals to the *potomitan* notion of a concrete actionable stake of some form by reference back to Trouillot (1977), we would expect similar such restorative measures of material equity to constitute necessary steps for peoples and nations seeking out membership in a commonwealth of decolonial enclaves.

Since we also see this project as requiring the dismantling of the stranglehold on power at all institutional levels, we must concede the limits of our project in not adequately addressing the next steps forward for a Haiti facing systemic ecological challenges as the consequence of centuries of colonial exploit. In addition, just the foreign policy relations with its neighboring Dominican Republic have led to undeniable conditions of modern slavery whereby the same Haitians once having achieved liberation from colonial exploit are subjected to the same double dilemma of neo-colonial exploit paired with the new iterations of agricultural bondage due to

extreme domestic labor shortage (Bales 2012). As far as reinvigorating suppressed narratives of historical resistance, there is likely a need for enhanced research into some of De Vastey's original insights on maroon nations as a mode of anti-colonial resistance as Haitians tire of more international aid and relief efforts culminating in new forms of colonial exploit. There is likely something to De Vastey's remarks that one of the greatest honors one can leave to one's children in inheritance would be passing on the best and most modern form of armed resistance (cut?).

At risk of letting the realities of the present cloud our vision for what can be gleaned for an actionable decolonial marketing, we conclude with a gesture to Trouillot's Creole maxim of *maladi nan san*. Here he refers to what might otherwise be regard as a proposed path to ameliorate the social afflictions of coloniality upon the body, mind, and psyche as dealt with by scholars in the mold of figures in the tradition of Fanon (Daut 2023, p. 61). Trouillot takes seriously the notion that harmful mental ideations could possibly have inherited effects over time and potentially become obstacles to human development on every known indices of well-being. That is perhaps the unspoken side to his choice to author *Stirring the Pot* in its original Creole as an attempt to restore lost collective memories and, in that process, begin to address critically harmful mental ideations by recovering a robust heritage of song, theater, elegiac works, indigenous cosmology, literature, and philosophy (Khan, Rafi, and Naguib 2019). With Trouillot's own background as an accidental academic that had begun as a song-writer, musician, and social activist, we hope that the bicentennial celebration of the 1825 independence from France warrants careful consideration of how that past informs and shapes the present and future.

References

Askegaard, Soren and J. Linnet (2011), "Towards an Epistemology of Consumer Culture Theory: Phenomenology and the Context of Context," *Marketing Theory*, 11(4), 381-404.

Bales, Kevin (2012), *Disposable People: New Slavery in the Global Economy*. Oakland: University of California Press.

Banerjee, S.B. (2021), 'Decolonizing Management Theory: A Critical Perspective.' *Journal of Management Studies* 0(0), 1-14.

Banerjee, S.B., C. Carter, and S. Clegg (2009), 'Managing Globalization.' *The Oxford Handbook of Critical Management Studies.* Eds. Alvesson, M, T. Bridgman, H. Willmont. Oxford: Oxford University Press, 186-212.

Baptista, T.F. and M.W. Hemais. (2024). "Coloniality of Knowledge and Marketing Education in Brazil: A Study Based on the Decolonial Perspective." *Proceeding of the 49th Annual Macromarketing Conference*, pp. 286-292.

Bowman, J. (2023). Hegel's master-slave dialectic and the Haiti revolt (1791–1804): Transatlantic print chronicles of race in an age of colonial market exchange. Philosophy & Social Criticism, 0(0). https://doi.org/10.1177/01914537231211042.

Crockett, D. (2022), "Racial Oppression and Racial Projects in Consumer Markets," *Journal of Consumer Research* 49, 1-24.

Daut, M. (2023). *Awakening the Ashes: An Intellectual History of the Haitian Revolution*. University of North Carolina Press.

Daut, M. (2015). *Tropics of Haiti: Race and the Literary History of the Haitian Revolution in the Atlantic World, 1789–1865*. Liverpool University Press.

Daut, M. (2020). When France Extorted Haiti--The Greatest Heist in History. *The Conversation* (30 June 2020).

DeBerry-Spence, B. and E. Izberk-Bilgin (2021), "Historicizing and authenticating African dress: diaspora double consciousness and narratives of heritage and community," *Consumption Markets & Culture* 24(2), 147-168. DOI: 10.1080/10253866.2019.1661245

De Vastey, B., & Bongie, C. (2014/1814). *The Colonial System Unveiled* (NED-New edition, 1, 1). Liverpool University Press. http://www.jstor.org/stable/j.ctt18mbc4m

Du Bois, W.E.B. (1904), *The Suppression of the Slave Trade to the United States of America: 1638-1870*. New York: Longmans, Green, and Co.

Eckhardt, G.M. et al. (2022), "Decolonializing Marketing." *Consumption, Markets, and Culture* 25(2), 176-186.

Fernandes Daniel (2020), "Politics at the Mall: The Moral Foundations of Boycotts," *Journal of Public Policy & Marketing*, 39 (4), 494–513.

Francis, J.N.P. (2023), "Rescuing Marketing from Its Colonial Roots: A Decolonial Anti-Racist Agenda," *Journal of Consumer Marketing* 40(5), 558-570.

Francis, J.N.P. (2021), "A Macromarketing Call to Action—Because Black Lives Matter!" *Journal of Macromarketing*, 41(1), 132-145.

Francis, J. N. P., & Mugabo, L. (2025). A Call for Afrocentric Decolonial Endogenous Marketing and Public Policy Research and Practice: Toward Sustainable Peace and Well-Being in

African Societies. Journal of Public Policy & Marketing, 44(1), 10-24. https://doi.org/10.1177/07439156241288820.

Greeff, W.J. (2023), "Decolonizing Marketing: Five Fundamental Decisions for Customer Engagement," *European Journal of Marketing*, 57(11): 2918-2944.

Hemais, M.W. and R.B.F. dos Santos. (2021), "Understanding the Brazilian Consumerism Movement from a Decolonial Perspective: The Case of Proteste," *Journal of Macromarketing* 41(2), 315-331.

Jack, G. (2008), "Postcolonialism in Marketing." In *Critical Marketing: Issues in Contemporary Marketing*. Eds. M. Tadajewski and D. Brownlie. Hoboken, NJ: John Wiley and Sons, 363-383.

James, C. L. R. (1989). The Black Jacobins (2nd ed.). New York: Vintage Books.

Jonassaint, J. (2021). *Stirring the Pot of Haitian History: by Michel-Rolph Trouillot* (M. Past & B. Hebblethwaite, Eds.). Liverpool University Press. https://doi.org/10.2307/j.ctv1hqdjnw.

Khan, Farzad Rafi, and Rabia Naguib (2019), "Epistemic Healing: A Critical Ethical Response to Epistemic Violence in Business Ethics." *Journal of Business Ethics* 156(1), 89–104.

Korschun, D., Martin, K. D., & Vadakkepatt, G. (2020). "Marketing's Role in Understanding Political Activity." *Journal of Public Policy & Marketing*, 39(4), 378-387. https://doi.org/10.1177/0743915620949261.

L'Ouverture, T. and J.B. Aristide (2008), *The Haitian Revolution*. New York: Verso.

Mignolo, W. D. (2011). *The Darker Side of Western Modernity: Global Futures, Decolonial Options*. Duke University Press. https://doi.org/10.2307/j.ctv125jqbw.

Nesbitt, Nick (2008), *Universal Emancipation: The Haitian Revolution and Radical Enlightenment,* Charlottesville: University of Virginia Press.

Oswald, L. R. (1999). Culture Swapping: Consumption and the Ethnogenesis of Middle-Class Haitian Immigrants. *Journal of Consumer Research*, *25*(4), 303–318. https://doi.org/10.1086/209541.

Rosa-Salas, M. & I. Flower (2020), 'Worth more than just its weight in gold': Nameplate jewelry and the practice of oppositional respectability, *Journal of Marketing Management*, 36(13-14), 1308-1337, DOI: 10.1080/0267257X.2020.1797854

Said, Edward W. (1993). *Culture and imperialism*. New York: Vintage Books.

Shebil SA, Rasheed AA, Al-Shammari H. (2011). Coping with boycotts: An analysis and framework. *Journal of Management & Organization*. 17(3):383-397. doi:10.5172/jmo.2011.17.3.383.

Sheller, M. (2003). *Consuming the Caribbean: From Arawaks to Zombies*. New York: Routledge.

Smith, W. (2002), *Consumption and the Making of Modern Respectability: 1600-1800*. New York: Routledge.

Touzani, M., E.C. Hirschmann, and F. Smaoui. (2016), "Marketing Communications, Acculturation in Situ, and the Legacy of Colonialism in Revolutionary Times," *Journal of Macromarketing* 36(2), 215-228.

Trouillot, Michel-Rolph. (1995). *Silencing the Past: Power and the Production of History.* Boston, Mass: Beacon Press.

Van Dyk, G. (2021), "A Tale of Two Boycotts: Riot, Reform, and Sugar Consumption in Late Eighteenth-Century Britain and France," *Eighteenth-Century Life* 45(3), 51-68.

Vorster, L., Kipnis, E., Bebek, G., & Demangeot, C. (2020). Brokering Intercultural Relations in the Rainbow Nation: Introducing Intercultural Marketing. Journal of Macromarketing, 40(1), 51-72. https://doi.org/10.1177/0276146719875189

Witkowski, T. H. (1989). "Colonial consumers in revolt: Buyer values and behavior during the nonimportation movement, 1764–1776." *Journal of Consumer Research*, 16(2), 216–226.

Reinforcement of Whiteness by Virtual Influencers:

A critical study in marketing, using semiotics, about Lu da Magalu

Lucas Costa Lima

Marcus Wilcox Hemais

Luís Alexandre Pessôa

The innovation trail in the Digital Influence market is constant and agile, and a new type of Influencer has been attracting attention for its engagement performance. Virtual Influencers (VIs) are non-human influencers generated by computers usually using 3D modeling and sometimes Artificial Intelligence (Kadekova and Holiencinova 2018).

No matter how successful the actions behind VIs may be, their use raises ethical issues that require careful consideration and discussion (Moustakas et al. 2020; Robinson 2020; Lou et al.2022). The characteristics of an influencer's appearance and behavior, for example, whether real or virtual, position them amid the world's racial debate, thus giving rise to discussions about the racial identity and gender representation of a VI and the digital propagation of dominant ideologies (Miyake 2023).

Whiteness can be understood as the white racial identity and how it is constructed (Sovik 2005), usually permeated with positive associations related to beauty, progress, and intelligence (Schucman 2020). Meanwhile, the identity of the "Other," especially black peoples, received negative meanings (Bento 2022). The main pillar of support in this process is a kind of pact, a tacit agreement between white people not to recognize themselves as an essential part of the persistence of racial inequalities (Bento 2002).

To understand how whiteness is present in the digital context through VIs, the present study aims to analyze the case of Lu da Magalu, the VI of one of the biggest Brazilian retailers Magazine Luiza (informally called Magalu, hence Lu da Magalu). Lu da Magalu was one of the first VIs in Brazil, created in 2003, and currently represents the retailer in all of its social networks. With time, the VI accumulated over 33 million followers, making her one of the most influential in the world, gaining a "celebrity" status, which was strengthened by her presence on the covers of magazines such as Elle and Vogue and in advertising for other Brazilian brands, aside other human celebrities. The way the brand represents Lu in social networks raises issues on how its success is based on a reinforcement of whiteness, which places the VI in a hegemonic position.

This research thus aims to analyze, from the theoretical perspective of whiteness, how Lu da Magalu is represented on Magazine Luiza's social networks, particularly on the retailer's Instagram, in order to understand how structures of whiteness are reinforced in this digital environment, helping to maintain social asymmetries.

To achieve this goal, 657 of the retailer's Instagram posts about Lu from 2019 to 2023, were analyzed, identifying the aesthetic elements that appeared most frequently and, and were therefore linked to symbols that shape the narrative construction of Lu's identity. From these aesthetic elements, six categories of images emerged: Lu as an icon of Fashion and Beauty; Lu's house; Lu promoting commercial campaigns; Lu in engagement content and memes; Lu in her free time; and Lu's social positioning. After all publications were categorized, the semiotic analysis process began, focusing on the discursive level of the content plan, examining the themes and figures addressed (Barros 2004), and the expression plan, focusing on chromatic, eidetic, and topological categories (Teixeira 2008).

Based on semiotic analysis, it was possible to highlight different aspects present in Lu da Magalu's posts that reinforce whiteness, here discussed in four topics.

Aesthetic Superiority as a fundamental trait of the construction of whiteness

Lu's bodily characteristics, since her creation until today, are based on this aesthetic standard of white superiority, with its roots in the morphological differentiation between whites and non-whites (Munanga 2004). These characteristics encompass not only her skin color, but also other physical traits, such as her straight hair, her thin and "delicate" nose and lips, her "pointed" and marked chin, and her facial symmetry.

It is important to emphasize that this aesthetic standard of Lu is also reinforced by her weight and size. Lu is tall and thin, and these attributes are highlighted in her posts based on aesthetic framing resources. Her body resembles that of runway models and, for this reason, she has become a fashion phenomenon with representation in traditional editorials, such as those in Vogue and Elle magazines.

Lu's hair color is dark, an aesthetic explicitly inspired by Luiza Trajano, founder's niece and board director president of Magazine Luiza. Aesthetic superiority is constructed when observing the contrasts between "creator" and "creature": Lu, unlike Luiza, is thin, tall, has finer features on

her face and even a whiter skin tone than the founder of the retailer that inspired the name of the VI. Lu is not initially created to be a beauty icon, but she gradually becomes one, and when such a status is constructed, it is built on white standards imposed as universal and exclusionary, thus configuring a symbolic and image-based perpetuation of beauty historically constructed by modernity (Gomes 2019), which began with European colonization and which continues to be reproduced today (Schucman 2020).

Neutrality: Silencing racial and social inequalities and dissociating them from discrimination

The concept of the Narcissistic Pact of Whiteness, developed by Bento (2002), reveals how the historical process and the manifestation of ideologies, such as whitening and the myth of racial democracy, sustain white racial identity. Thus, they create a veil that makes white people's raciality and their self-identification of whiteness invisible, so that white people perpetuate asymmetries that reinforce what they believe to be the superiority of their race (Bento 2022).

The low representation of racial themes in Lu's virtual reality does not occur only because the virtual influencer only appears in three of the brand's publications related to racial themes over the five-year period that the posts were analyzed. There is also another factor to be added to this, which is neutrality concerning the theme. For Bento (2002), neutrality is an important element of identification of whiteness, because not recognizing oneself as an integral part of this history is not assuming a legacy that accentuates the privilege that white people currently have.

Racism and inequality between whites and non-whites is a problem for the entire society, including companies and their marketing professionals (Francis 2022). The delay in taking a position and the low volume of posts demonstrate either that racial issues are of little importance to Lu or that there is no clear guidance on engaging with them. This may therefore mean that there is a strategy aimed at silencing such issues, which is behind the intention of protecting their own privileges (Bento 2002).

Magazine Luiza and its ambassador Lu perpetuate the denial of racial issues, expressing in their publications a notion of recognition of racial inequalities, but not associating them with any type of discrimination (Bento 2022). This positioning accentuates the privilege that whites currently have (Bento 2002), and, despite the evidence, the brand and Lu still do not recognize themselves as an inseparable part of the scenario of social discrimination.

Race is seen not just as a difference but as a hierarchy

Although the concept of "race" is considered a social and ideological construct when it comes to the human species, it is still a challenge to demystify it in the context of everyday social life (Bento 2017) and media production (Carrera 2020). Piza (1998) argues that whites see themselves only as representatives of themselves, individuals in the full sense of the word, in which color and race are not part of this individuality. Non-whites, on the other hand, represent a collective united by their color and race, reducing their subjectivity in the face of this collective, thus reinforcing the hierarchical position of superiority of whites, as they are given the privilege of being the protagonist of their own story.

Evidence of the hierarchy between whites and non-whites is evident in Lu's publications when there is an intention to propose a diverse racial composition, but reflecting social perceptions pointed out by Piza (1998). Such publications intend to represent different individuals, suggesting that they are aware of the plurality of races, but these publications fail to mention that diversity is materialized through non-whites, and not in white protagonism (Carrera 2020). For example, it was observed that some posts have representations of people of non-white races. However, these people only appear in supporting roles due to their positioning in relation to Lu.

This relationship caused by the aesthetic resource of positioning Lu in the foreground in the middle of the image and the other racialized people positioned in her "orbit" or beside her may highlight not only racial differentiation between Lu and non-white models but also their hierarchy in this supposed racial diversity that the brand portrays in editorials. It is therefore possible to imagine that there is a camouflage of inconsistent practices in the production of such advertising, especially regarding stereotypes (Carrera and Torquato 2020) and in the differentiation of representation and social perception between white and non-white peoples (Piza 1998).

Class as a marker to define one's own whiteness

Corossacz (2014) states that one of the distinctive characteristics of Brazilians is their propensity to use class as the main category to interpret society, daily interactions, and conflicts. Therefore, discrimination and violence against non-white people are often justified in terms of class, suggesting that they are discriminated against not because of their race, but because of their economic status (Guimarães 2012).

The predominance of class over color as a category of interpretation of social reality is called into question when analyzing the ideology of whitening, which highlights a stigma for someone being identified as black in Brazil (Corossacz 2014). Given this, theoretical, ethical, and political efforts to articulate multiple axes of oppression and subordination that shape human experiences (Hirata 2014) are crucial to understanding intertwined racial and social phenomena. Lu's racial identity is connected with her social class, which guarantees her privileged access to goods and resources, reinforcing and visually positivizing her whiteness (Corossacz 2014).

There is an effort by the brand to represent Lu's house as clean and organized, decorated with expensive materials and products, ornamental plants, and state-of-the-art electronics. Lu is portrayed as an upper-middle-class person who has achieved success and financial stability, displaying a high standard of consumption and domestic organization in aspirational publications. Her lifestyle is sophisticated and everything seems “perfect” in her home.

When represented outside of her home, Lu is mostly seen in environments that demonstrate economic prosperity and access to high-value consumer goods, isolating herself from any type of space with connotations of need, reinforcing the stereotype with colonial roots that wealth is inherent to white people (Seyferth 1994). These places of need, disorganization, and dirt, which are avoided by the VI in search of a representation of a “perfect” life, have been historically associated with non-white people. Therefore, through her publications, Lu demonstrates that she does not attend places intended for “lower” social classes than her own, thus configuring her condition of whiteness as socially exclusionary (Corossacz 2014).

We thus conclude that these manifestations of whiteness represented in the Instagram post of Lu da Magalu are not independent, but rather intertwined in a complex web of power and privilege, making it palpable to understand that the manifestations of whiteness present in the construction of Lu's identity are not just individual reflections, but rather symptoms of broader structures of power and privilege (Bento 2002). The importance of critically studying a VI therefore lies in the deeper understanding of the social, cultural, and political dynamics that permeate its representation in the contemporary digital sphere.

References:

Barros, Diana (2004), "Publicidade e figurativização," Alfa: Revista de Linguística, 47(2), 11-31.

Bento, Cida (2017), "Branqueamento e branquitude no Brasil," in Carone, Iray and Cida Bento (Orgs.). *Psicologia social do racismo: estudos sobre branquitude e branqueamento no Brasil*. Petrópolis: Vozes.

Bento, Cida (2022), *O pacto da branquitude*. São Paulo: Companhia Das Letras.

Carrera, Fernanda (2020), "Raça e privilégios anunciados: ensaio sobre as sete manifestações da branquitude na publicidade brasileira," Revista Eptic, 22(1), 6-28.

Carrera, Fernanda and Chalini Torquato (2020), "Diversitywashing: As marcas e suas (in)coerências expressivas," Comunicação, Mídia e Consumo, 17(48), 84-107.

Corossacz, Valeria (2014), "Relatos de branquitude entre um grupo de homens brancos do Rio de Janeiro," Revista Crítica de Ciências Sociais, 105, 43-64.

Francis, June (2023), "Rescuing marketing from its colonial roots: a decolonial anti-racist agenda," Journal of Consumer Marketing, 40(5), 558-570.

Gomes, Nilma Lima (2019), *Sem perder a raiz: corpo e cabelo como símbolos da identidade negra*, 3rd ed., Belo Horizonte: Autêntica Editora.

Guimarães, Antonio Sergio (2012), *Classes, raças e democracia*, 2nd ed., São Paulo: Editora 34.

Kadekova, Zdenka and Holiencinova, Maria (2018), "Influencer marketing as a modern phenomenon creating a new frontier of virtual opportunities," Communication. Today, 9 (2), 90-105.

Lou, Chen, Siu Ting Kiew, Tao Chen, Tze Yen Lee, Jia Ong, and Zhao Phua (2022), "Authentically Fake? How Consumers Respond to the Influence of Virtual Influencers." Journal of Advertising, 52 (4), 1–18.

Miyake, Esperanza (2023), "I am a virtual girl from Tokyo: Virtuais influencers, digital-orientalism and the (Im)materiality of race and gender," Journal of Consumer Culture, 23(1), 146-171.

Moustakas, Evangelos, Nishta Lamba, Dina Mahmoud, and C Ranganathan (2020), "Blurring Lines between Fiction and Reality: Perspectives of Experts on Marketing Effectiveness of Virtual Influencers," 2020 International Conference on Cyber Security and Protection of Digital Services (Cyber Security), 1-6.

Munanga, Kabengele (2004), "A difícil tarefa de definir quem é negro no Brasil," Estudos Avançados, 18(50), 51-66.

Piza, Edith (1998), *O caminho das águas: estereótipos de personagens negras por escritoras brancas*, São Paulo: Edusp.

Robinson, Ben (2020), "Towards an Ontology and Ethics of Virtual Influencers," Australasian Journal of Information Systems, 23(1), 333-345

Schucman, Lia (2020), *Entre o encardido, o branco e o branquíssimo: Branquitude, hierarquia e poder na cidade de São Paulo*. São Paulo: Veneta.

Seyferth, Giralda (1994), "A invenção da raça e o poder discricionário dos estereótipos," Anuário Antropológico, 18 (1),175-203.

Sovik, Liv (2005), "Por que tenho razão: branquitude, Estudos Culturais e a vontade de verdade acadêmica," Revista de Comunicação e Cultura, 3(2), 159-180.

Teixeira, Lucia (2008), "Leitura de textos visuais: princípios metodológicos," in Bastos, Neusa (Org.), *Língua Portuguesa: Lusofonia - Memória e Diversidade Cultural*. São Paulo: Editora da PUC-SP.

Reversing the Tide: Corporate DEI Rollbacks in Response to Cultural Backlash.

Francesca Avallone

Antonella Cammarota

Abstract

This study breaks new ground by empirically examining regressive activism, a phenomenon that has received scant attention in the literature. Focusing on the highly debated DEI rollbacks adopted by several U.S. companies, this research identifies key triggers, corporate responses, and potential consequences. Using a comparative case study approach, the study conducted a Factiva search of U.S.-focused news coverage, collecting 3,211 articles and identifying 21 brand cases for the in-depth analysis. The findings reveal how macro, meso, and micro-level pressures shape three distinct types of corporate reactions, each carrying significant internal and external outcomes. This study offers valuable theoretical insights to deepen the understanding of regressive activism and provides practical guidance for companies navigating an increasingly polarized and populism-oriented society.

Keywords: Diversity and Inclusion, DEI, Regressive Activism, Politics, Cultural Backlash, Populism.

Introduction

"Nothing is political.
Everything can be politicized."
(Astrid Deuber-Mankowsky 2008)

The global socio-political system is undergoing rapid and significant shifts. The growing intersection between business and politics has given rise to complex market dynamics and strategies difficult to understand, structure, and manage - known as corporate activism or brand activism (Jung and Mittal 2020; Moorman 2020). Businesses have strongly entered the political arena by answering both political and market logics aiming to contribute to the common good and/or mitigate societal issues (Gupta et al. 2024; Martin and Burpee 2022).

Many corporations have taken explicit stances on social, political, and environmental issues, actively promoting ideals of inclusion, diversity, and peace (D'Arco et al. 2024; Tsougkou

et al. 2025). By engaging in contentious debates, these firms expose themselves to significant reputational and financial risks (Bhagwat et al. 2020). Many companies have positioned themselves as advocates for social causes and political ideologies, collaborating with social movements such as *Black Lives Matter, MeToo*, and *Pride Movement*, as well as non-governmental organizations (Lee et al. 2024; Vredenburg et al. 2020), with the overarching goal of driving societal change.

Often, this change has been progressive and positive (Podnar and Golob 2024), seeking to influence policymakers (Eilert and Nappier Cherup 2020) and foster prosocial intentions, attitudes, and behaviors (Korschun et al. 2020). Consequently, corporations have become relevant actors for democracy, with their advocacy efforts contributing to greater freedom of expression, heightened public awareness, and increased political engagement on these pressing issues (Appels et al. 2024).

From this perspective, whether activism is merely a passing trend or a marketing ploy (Lewis and Vredenburg 2023) is ultimately irrelevant, as this strategy has fundamentally reshaped the role of businesses and brand management itself (Andersen and Johansen 2024). In many cases, activism emerges as a response to market pressures - more specifically, to consumers who are increasingly attentive and sensitive to socio-political issues, demanding that companies leverage their power and set an example (Lou et al. 2024).

This company commitment may manifest in different ways, such as a complete brand identity shift toward more inclusive and diverse values, as the case of with Victoria's Secret, or through bold and controversial statements, exemplified by Nike's campaign featuring Colin Kaepernick, a well-known athlete for his strong stance in support of racial and ethnic equality. After he became the face of Nike's campaign, the company's market value increased by $6 billion (Anderson et al. 2024).

However, the expansion of corporate influence into the political sphere has also led businesses to take explicit positions in support of or opposition to political candidates. Examples include anti-Trump advertising campaigns during the 2016 elections (Gulbrandsen et al. 2020) and, conversely, the endorsement of Donald Trump by high-tech corporations in the 2024 elections (Sherman 2024). This dynamic usually unfolds within a globalized society characterized by decentralized governance structures, where populism may reshape the role of large corporations (Al-Esia et al. 2024; Scherer and Palazzo 2011). In this regard, scholars have analyzed

how corporate social engagement evolves in response to polarization and populism, demonstrating that businesses adapt their strategies based on the political and social contexts in which they operate (Feldmann and Morgan 2023; Moffitt 2020).

Populism is not tied to right- or left-wing politics but rather represents an *extremization* of positions on a range of social values, including identity, family, diversity, and nationalism (Sallai et al. 2024). It is often driven by strong leaders who claim to oppose elites and advocate for the people, frequently employing provocative and coarse rhetoric, particularly on social media (Guriev and Treisman 2022). The rise of populism in the United States and some European countries is undoubtedly impacting large corporations, which until recently had strongly advocated for broad progressive values. It is within this context that, from mid-2024 to early 2025, American newspapers began reporting on how some major brands had decided to step back from their commitments to social issues such as *diversity, inclusion, and equity (DEI)* (Crist 2025; Gonzales 2024). These reports sparked intense debates on the subject, with some arguing that this marked the end of woke capitalism (Dumas 2025). According to critics, this shift revealed that these companies were never genuinely committed to social issues but rather pursued such goals for reasons beyond aligning values, purpose, and corporate practices.

Faced with these unprecedented developments, we contend that the situation is far more complex by requiring a multidisciplinary approach and careful analysis for a full understanding. It could be crucial to investigate the phenomenon considering its social, political, and business dynamics, considering the underlying motivations, risks, and strategic decisions. From our viewpoint, this could mark a major paradigm shift in the role of corporations in society or a critical mistake that could come at a steep cost.

Therefore, the purpose of this study is to analyze the DEI retractions among American corporations to begin understanding the phenomenon by identifying which companies have considered this decision, what actions they have taken, the possible triggering factors, and the potential consequences. To address these goals, a comparative case study approach was employed, utilizing a Factiva search of the U.S.-focused news. Findings reveal a strong interdependence between political pressures and corporate responses, highlighting different strategic approaches and potential internal and external consequences. This positions the phenomenon as a possible case of *regressive activism*, where businesses retreat from sociopolitical issues rather than advancing them (Sarkar and Kotler 2020). The next article's

sections present a brief literature review on the phenomena studied, followed by the methodology, findings, and discussion, outlining both theoretical and practical implications. Finally, the conclusions provide key insights to guide future research in this emerging field.

Theoretical Background

Corporations for DEI

DEI in corporate contexts began as part of mid-20th-century affirmative action and anti-discrimination efforts, focusing on legal compliance and broadening workforce demographics (Kelly and Dobbin 1998; Portocarrero and Carter 2022). Earlier research on diversity and inclusion primarily focused on etic dimensions of social difference (Kelly and Dobbin 1998). These differences were often defined in terms of gender, ethnicity, and disability, which have since been formally recognized and codified in United Nations conventions aimed at eliminating discrimination on a global scale. Over time, additional categories have also gained international recognition as essential components of diversity and inclusion, driven by persistent social inequalities and the influence of advocacy movements pushing for their acknowledgment and protection (Özbilgin et al. 2024). Today, DEI includes categories of individuals who face discrimination based on sexual orientation, gender identity, religion, beliefs, age, social class, and migration status (Arsel et al. 2022).

However, scholars have increasingly emphasized the ethical and cultural dimensions of inclusion (Pless and Maak 2004), while many firms reframed compliance-driven policies into internal diversity initiatives that centered on talent recruitment and retention (Konrad and Linnehan 1995). Subsequently, research turned attention to leadership commitment and inclusion climate, linking these factors to improved employee satisfaction and performance (Li et al. 2019; Dover, Major, and Kaiser 2019).

In parallel, marketing-focused studies have shown that consumer-facing diversity, such as featuring multi-racial ensembles or inclusive messaging, can strengthen brand perceptions and foster multicultural alignment, albeit with potential backlash if perceived as tokenistic (Chowdhury, Arli, and Septianto 2023; Henderson, Mazodier, and Khenfer 2023; Jonsen et al. 2019). According to Branca, Grosso, and Castaldo's (2024) TCCM-based review, however, genuinely inclusive marketing efforts must address not only demographic representation but also

the reduction of stigmatization and marginalization, thereby yielding concrete benefits for both marginalized groups and overall organizational well-being.

This broader perspective highlights that DEI initiatives grounded in cultural transformation, and integrated across corporate functions, can bolster employee empowerment, enhance stakeholder relations, and ultimately reinforce brand value (Branca et al. 2024; Pless and Maak 2004). Reflecting this shift, some marketing scholars view the call to "cultivate and celebrate diversity, including gender, at all levels of business while ensuring equality of opportunity for all employees" (Sarkar and Kotler 2018) as a potent form of corporate activism capable of catalyzing meaningful social impact. In this regard, due to its profound relevance to society, marketing, and public policy, DEI has become a strategic platform for corporations to showcase their commitment to inclusivity through statements and actions aimed at fostering a more equitable world (Branca et al. 2024). In this context, some examples include *Starbucks*, which has actively supported disability inclusion for years through targeted initiatives during Disability Pride Month; *Airbnb*, which has advocated for immigrants and political refugees since 2017 with its We Accept campaign; or *Gucci*, which in 2023 launched initiatives to combat gender-based violence.

From Cultural Backlash to Regressive Activism

Corporate activism has traditionally been framed as a progressive force for social change, with brands intervening in societal issues to promote inclusivity, equity, and sustainability (Moorman 2020; Sarkar and Kotler 2020). However, activism is not inherently progressive; it can also be neutral or regressive, aimed at preserving or reinstating traditional social norms in response to perceived threats from cultural and demographic shifts (Podnar and Golob 2024). While progressive activism has been widely studied, the literature on regressive activism remains scarce, leaving critical gaps in understanding how companies align with or respond to societal forces advocating *against* DEI goals (Lin 2018). This lack of research is particularly striking given the increasing role of brands in navigating socio-political tensions, where companies may find themselves either resisting or conforming to pressures from cultural backlash movements (Gambetti and Biraghi 2023).

The theory of cultural backlash, developed by Norris and Inglehart (2019), offers an important framework for explaining the conditions under which regressive corporate activism emerges. Their work posits that as societies progress toward more liberal and inclusive norms,

social conservatives and older generations experience a “tipping point” at which they feel displaced by new social values. This perceived erosion of traditional cultural hierarchies triggers a defensive response, fueling movements that seek to restore past norms. While Norris and Inglehart primarily examine this phenomenon in the context of voting behavior and political mobilization, the implications for corporate activism are significant. Companies may engage in regressive activism not only as a strategic response to shifting consumer expectations but also as a reaction to broader cultural and political forces that challenge their historical business models and stakeholder relationships.

Regressive brand activism differs from corporate neutrality in that it is an active effort to resist or roll back progressive social initiatives. As described by Sarkar and Kotler (2020), while progressive activism seeks to create a more inclusive and just society, regressive activism promotes exclusionary policies, reinforcing social hierarchies and appealing to constituencies that feel alienated by progressive change. Such activism may take various forms, including publicly opposing diversity policies, privately lobbying against inclusive regulations, or subtly dismantling DEI initiatives while maintaining a neutral corporate fade (Podnar and Golob 2024). This approach often resonates with stakeholders who reject cultural pluralism or view DEI efforts as ideological overreach, reinforcing narratives that frame corporate activism as an encroachment on personal or national identity.

The limited research on regressive activism raises essential questions about its long-term consequences and strategic viability. The existing literature on brand activism suggests that authenticity is a crucial determinant of consumer trust and brand equity (Vredenburg et al. 2020). Companies that take inconsistent stances, publicly supporting inclusivity while privately retracting DEI initiatives may risk being perceived as opportunistic or hypocritical, which can also erode brand credibility (Mirzaei et al. 2022). In this regard, Villanova and Matherly (2024) highlight that consumer brand shame plays a significant role in shaping consumer behavior, as individuals distance themselves from brands whose actions contradict their personal values. While regressive activism may solidify loyalty among certain demographics, it may simultaneously alienate younger, more diverse, and globally conscious consumer segments, raising shaming towards the brand and questions about its long-term sustainability as a corporate strategy.

Moreover, cultural backlash movements do not emerge in isolation but are deeply embedded in broader socio-political and economic structures. Norris and Inglehart (2019) argue

that the rise of cultural backlash is not merely a generational divide but a reaction to broader societal transformations, including globalization, immigration, and shifts in gender and racial dynamics. These tensions are reflected in the business world, where corporate decisions about DEI are increasingly scrutinized within a polarized public sphere. Companies navigating this landscape should weigh the risks of alienating different stakeholder groups, balancing economic pragmatism with ideological positioning.

Thus, while some firms may choose to maintain or expand DEI efforts despite opposition, others may opt for retrenchment, responding to cultural backlash through strategic rollbacks of diversity initiatives.

Despite the theoretical value of the cultural backlash framework, its application to corporate activism remains underexplored. The assumption that older, more conservative cohorts drive regressive movements is challenged by emerging evidence suggesting that younger demographics, particularly those facing economic precarity, can also exhibit populist tendencies (Schäfer 2021). This complicates the simplistic generational narrative often associated with cultural backlash, suggesting that corporate responses to DEI rollbacks may be shaped by a more complex interplay of political, economic, and cultural factors. Consequently, research is needed to examine how companies interpret and respond to backlash-driven pressures, as well as how these decisions affect brand legitimacy, consumer loyalty, and long-term market positioning.

Method

We employed a comparative case study approach (Eisenhardt 1989; Miles & Huberman 1994; Yin 2003) to develop a broad theoretical perspective on how U.S. companies navigate and respond to DEI rollbacks. We conducted a Factiva search of the U.S.-focused news coverage, combining diversity-related terms (e.g., “DEI,” “diversity and inclusion,” “DEIB”) with markers of retraction or defunding (“halt,” “cancel,” “pull out,” “scale back”). This search yielded 3,211 articles, which two researchers independently screened to eliminate minor controversies, purely governmental actions, and nonprofit settings.

This process produced an initial dataset of 48 possible events in which brands faced substantive stakeholder backlash over discontinuing or scaling back DEI. Following theoretical sampling (Eisenhardt & Graebner 2007), we retained 21 final brand cases that exhibited either overt rollbacks and highly public controversies or clear refusals to comply with anti-DEI pressure.

This final set spanned diverse industries (e.g., retail, automotive, technology), including some brands that ultimately withdrew DEI commitments and others that openly defied external demands.

To capture each brand's trajectory, we compiled archival data, press releases, social media postings, and corporate announcements, alongside chronological "controversy narratives," detailing how companies announced DEI modifications, the timing and nature of stakeholder pushback (e.g., state attorneys general letters, conservative influencer campaigns), and how each brand responded.

Our iterative coding process (Miles & Huberman 1994) focused on three key elements. First, we identified recurring triggers, categorized into micro, meso, and macro factors, which we termed antecedents. Second, we detected corporate reactions to DEI-related demands and pressures, allowing us to uncover three distinct strategic responses and positions adopted by different companies. Third, coding of U.S.-focused news coverage, enabled us to recognize potential internal and external consequences. The data were initially coded deductively, guided by the corporate activism framework (Cammarota et al. 2024; Sarkar & Kotler 2020), and subsequently coded inductively to capture emergent patterns and profiles, such as active, passive, and regressive corporations.

Through cross-case comparison, we identified three specific corporations' approaches - active, passive, and regressive/reactiv - corresponding to the extent to which brands resisted retracting their DEI programs, partially complied to dismantle them, or fully acquiesced. Based on insights gathered from U.S. media coverage, we uncovered how these divergent stances influenced several aspects like employee morale, external reputations, and legal and political exposure. This analysis allowed us to begin identifying the paradoxes of brand activism within rollback contexts (Eisenhardt 1989; Stake 2013).

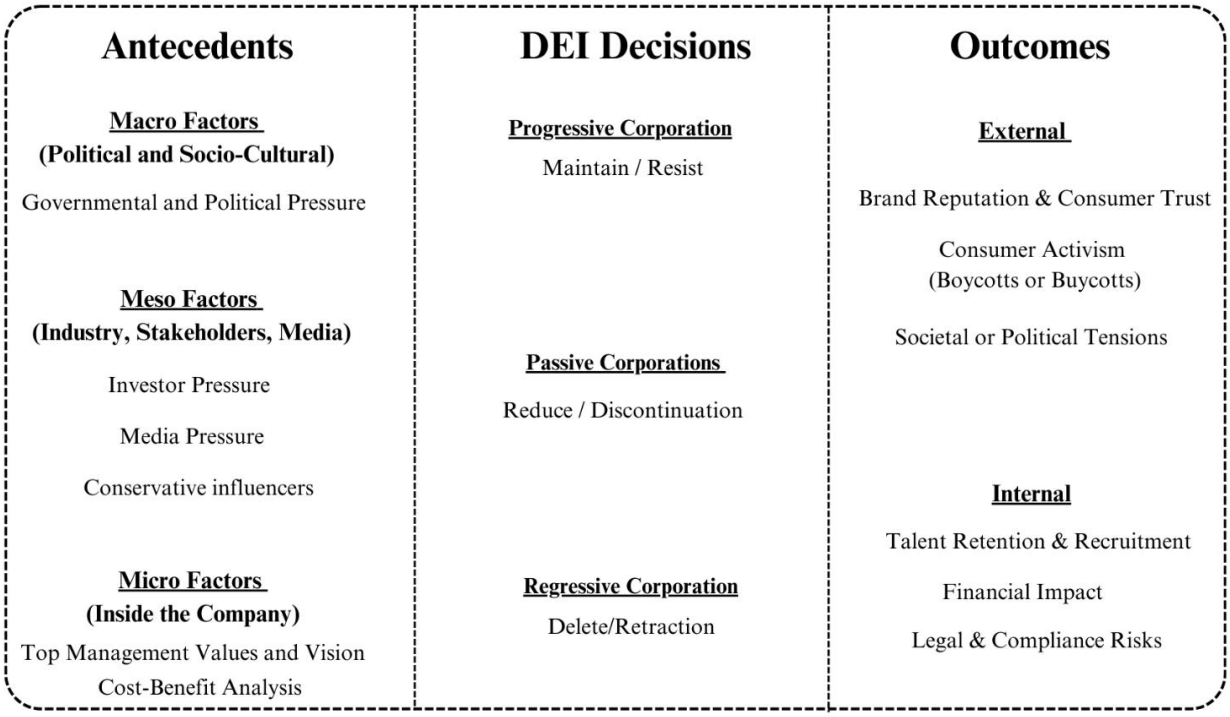
Findings

Our data set encompasses Costco, Target, Walmart, Meta, Amazon, Starbucks, McDonald's, Ford, Boeing, Harley-Davidson, John Deere, Lowe's, Molson Coors, Nissan, Tractor Supply, Polaris, e.l.f. Beauty, and the Central Florida Tourism Oversight District (ex-Reedy Creek), all corporations featured in controversies over DEI rollbacks. Findings reveal a multi-level structure of triggers influencing corporate DEI responses. At the macro level, companies faced

political and cultural pressures. At the meso level, external forces such as stakeholders, media, and industry peers exerted influence. Finally, at the micro level, internal dynamics within organizations contributed to decision-making processes.

Corporate reactions to these pressures varied but can be categorized into three distinct clusters, reflecting differing strategic approaches to DEI initiatives. These decisions, in turn, led to significant internal and external consequences, impacting employee morale, brand reputation, and stakeholder relationships. These outcomes highlight the complexity of corporate DEI responses and suggest the need for further exploration. **Figure 1** summarizes these findings, illustrating the relationship between antecedents, corporate DEI decisions, and their internal and external outcomes.

Figure 1. Antecedents, Decisions and Outcomes of DEI retraction



Source: Author's Elaboration

The findings reveal that most U.S. companies either passively scaled back their DEI initiatives - quietly renaming or dismantling programs to appease critics (e.g., Walmart, McDonald's) - or reactively implemented outright eliminations, effectively adopting a regressive activism stance (e.g., Harley-Davidson's closure of its DEI function, Boeing's disbanding of its global DEI team). We refer to this behavior as regressive. In contrast, some companies maintained

a progressive approach. For instance, a subset of firms, such as Costco and e.l.f. Beauty, upheld or even strengthened their diversity commitments despite intense anti-woke pressures. This approach resulted in increased support from both employees and consumers aligned with progressive ideologies. Conversely, companies that adopted regressive or passive strategies - either significantly reducing or quietly diminishing their DEI commitments - often experienced a decline in brand reputation and decreased interest from emerging and progressive talent pools. **Table 1** below offers a condensed illustration of select brand outcomes, highlighting how each approach can lead to distinct reputational and operational consequences.

Table 1. DEI Retraction cases examples

Company	Rollback Type	Antecedents	Strategy (Activism Type)	Key Outcomes (Internal / External)
Costco	None (resisted)	Letters from conservative AGs demanding end of DEI	**Progressive:** Maintained DEI	Strengthened internal morale; some legal threats, but enhanced pro-DEI brand trust
Target	Partial reduction	Negative Pride-related coverage, fear of boycotts	**Passive:** Reduced scope	Damaged inclusivity reputation; short-term calm among conservatives; progressive protests
Meta	Partial rollback (downsized)	Concern over “reverse discrimination” lawsuits	**Regressive:** Complied to cut	Internal dissatisfaction, negative

				employer brand buzz; avoided major legal battles

Source: Author's elaboration

In aggregate, passive and regressive/reactive rollbacks (Target, Walmart, Meta, Amazon, Ford, Boeing, John Deere, Lowe's, Molson Coors, Nissan, Tractor Supply, Reedy Creek) appear motivated by fears of conservative consumer backlash or direct legal threats.

Internal outcomes typically include diminished employee morale and potential losses in minority talent, while external effects range from short-term appeasement of anti-woke activists to lasting brand tarnish among progressive or urban audiences.

Meanwhile, progressive stances (Costco, e.l.f. Beauty, and sometimes Starbucks, which successfully fought off a shareholder lawsuit) retained their DEI commitments and cultivated positive reputations with pro-inclusion segments, accepting the trade-off heightened tension with conservative constituencies. Overall, these findings underscore how macro political pressures intersect with company-level priorities, causing brands to adopt divergent activism postures, from resolutely inclusive stances to outright regressive approaches - in their evolving management of DEI.

Discussion and Implications

The study's findings reveal that corporate responses to DEI rollbacks are deeply embedded within broader socio-political tensions, highlighting the complex interplay between business strategy, cultural backlash, and brand activism. While much of the existing literature frames corporate activism as a predominantly progressive force (e.g. McKean and King 2024; Tsougkou et al. 2025), this study demonstrates that, when faced with diverse pressures, companies may adopt regressive positions, leading to complex consequences that remain underexplored in the scholarly field.

These findings suggest that corporate engagement with DEI initiatives may not reflect an authentic commitment to diversity. Instead, it represents a dynamic and contested process,

influenced by external political pressures, internal organizational priorities, and evolving stakeholder expectations. The following sections delineate three major contributions to literature, offering valuable insights for scholars and businesses.

The Strategic Spectrum of DEI Rollbacks

This study is pioneering by analyzing one of the first and most critical cases of regressive activism, highlighting how companies may adopt three distinct approaches in response to DEI-related controversies: progressive activism by resisting rollback pressures, passive compliance by scaling back DEI initiatives without overt opposition, and regressive activism by actively dismantling diversity programs or aligning with anti-DEI sentiments.

Notably, progressive activism, as exemplified by companies such as Costco and e.l.f. Beauty, involved taking a firm stance in defense of inclusion despite significant conservative backlash. These companies maintained or even expanded their DEI commitments, positioning themselves as leaders in social responsibility. By doing so, they aligned with younger, multicultural consumer bases and leveraged their corporate values as key differentiators in the market. Although this approach risked alienating more conservative stakeholders, it simultaneously enhanced internal employee morale and reinforced external reputations among progressive audiences (Haupt et al. 2023).

Then, passive compliance, exemplified by brands such as Target and McDonald's, involved quiet retrenchments of DEI policies in response to political and consumer pressure. Unlike regressive activists, these brands did not publicly disavow DEI; instead, they subtly reframed or reduced diversity efforts, aiming to appease conservative critics while minimizing reputational risks among pro-DEI stakeholders. This strategy represents a risk-mitigation approach, balancing competing demands but ultimately exposing brands to criticism from both sides - viewed as capitulating by progressives and insufficiently committed to rollback by conservatives.

Lastly, the regressive activism, performed by companies such as Meta, Harley-Davidson, and Boeing, involved active dismantling of DEI structures, either in response to direct political and legal threats or as a strategic alignment with shifting socio-political currents. This study aligns with Sarkar and Kotler's (2020) conceptualization of regressive activism as corporate action that reinforces existing social hierarchies rather than challenging them. While this approach may generate short-term financial stability by catering to conservative constituencies, it also risks long-

term reputational damage, particularly among younger and globally oriented consumer segments (Villanova and Matherly 2024).

These “new activist” dynamics, due to their complexity and the varied responses companies may adopt, represent a significant shift in the understanding of brand activism, revealing a previously unexplored dimension (Golob & Podnar 2024). This emerging perspective challenges existing knowledge by highlighting this lesser-known facet of brand activism and calling for increased scholarly attention toward its understanding.

From a managerial standpoint, the implications are multifaceted. First, our study demonstrates that within the realm of activism, companies must navigate not only the complex expectations of consumers but also those of policymakers. This underscores the growing influence of political ideologies as a primary driver in shaping both the demands faced by companies and their strategic responses. The findings reveal that diverse pathways are available to businesses and that, similar to progressive activism, regressive pressures require careful evaluation, strategic consideration, and deliberate implementation. Failure to do so may expose companies to significant and varied risks, affecting both their internal operations and external reputations.

Cultural Backlash and Macro Approach

The concept of cultural backlash emerges as a key theme connected to regressive activism, offering a critical lens for understanding why brands are increasingly pressured to withdraw from progressive initiatives such as DEI. As conceptualized by Norris and Inglehart (2019), cultural backlash arises from rapid cultural and demographic shifts driven by globalization, increasing diversity, and evolving gender norms, which have triggered a counter reaction among segments of society that feel alienated by progressive change. This backlash is particularly pronounced among older and more socially conservative populations who perceive a tipping point where their once-dominant values are becoming marginalized. Within this framework, we argue that regressive corporate activism can be understood as a corporate adaptation to cultural backlash.

Companies that dismantle DEI initiatives are often responding to pressures from conservative consumer bases, state attorneys general, and political influencers who frame diversity policies as ideological overreach. The findings of this study suggest that while some firms respond to backlash through strategic retreat, others actively leverage anti-woke rhetoric as a

brand positioning tool, signaling alignment with populist movements that oppose progressive corporate influence.

However, while Norris and Inglehart (2019) emphasize generational divides as a primary driver of cultural backlash, emerging critiques argue that this framework oversimplifies the demographic profile of anti-woke sentiment (White and Schäfer 2021). Younger, economically precarious consumers may also exhibit populist tendencies, complicating the assumption that progressive values will inevitably dominate over time. This indicates that companies engaging in regressive activism may not solely be responding to older conservative consumers but also to broader economic and political realignments that transcend age-based divisions.

Based on this, we contend that the role of populism has been largely overlooked in corporate activism studies to date, which have predominantly focused on understanding consumer political ideologies from a micro-level perspective (D'Arco et al. 2024; Haupt et al. 2023). In contrast, our study underscores the critical importance of adopting a macro-level perspective in activist strategies. Understanding the political climate of a given system, specifically, whether companies operate in more or less populist countries, can help predict social and political pressures. This awareness enables firms to develop precise, strategic responses and effectively manage stakeholder reactions, particularly from more progressive consumer groups.

Our study aims to serve as a guide for DEI-related decision-making, with potential applicability to other socially sensitive issues such as abortion, cannabis legalization, same-sex marriage, sex work legalization, gun control, and anti-corruption efforts. However, it does not advocate for any single approach as inherently superior or more ethical. Instead, it highlights the potential risks associated with each strategy and stresses the need for a strategic, risk-mitigation approach that also maximizes opportunities. The goal should be to foster a win-win approach for both society and businesses, ensuring that activist strategies are not only socially responsible but also aligned with long-term corporate objectives.

The Risks of Regressive Activism

While some brands have attempted to frame DEI rollbacks as pragmatic and expedient business decisions, this study highlights the reputational and operational risks associated with regressive activism. First, authenticity remains a critical determinant of brand trust (Bulmer et al. 2024). Companies that publicly champion diversity while privately retracting commitments risk

being perceived as opportunistic or hypocritical (Wagner et al. 2020), thereby undermining consumer confidence and employee engagement (Mirzaei et al. 2022). This concern is amplified in the age of social media, where digital activism empowers stakeholders to hold brands accountable for discrepancies between their stated values and corporate actions, often generating anti-brand actions that companies struggle to manage effectively (Pöyry and Laaksonen 2022).

Second, the potential for brand shame and consumer disengagement presents long-term challenges that have not been thoroughly investigated, even within the context of progressive activism. As Villanova and Matherly (2024) note, consumers who feel betrayed by a brand's shift away from inclusivity may actively distance themselves to maintain alignment with their personal values. This can be particularly damaging in sectors where brand loyalty is central to consumer retention, such as retail, technology, and lifestyle industries.

Third, the financial benefits of regressive activism remain highly uncertain. While appeasing conservative stakeholders may offer short-term stability, the long-term market implications are ambiguous and unpredictable. Moreover, considering that the younger consumers - like Gen Z - are projected to dominate market demographics in the coming decades, and companies that align too closely with cultural backlash risk alienating these future consumer bases.

Fourth, from an international perspective, global businesses face increasing regulatory and investor pressures tied to corporate social responsibility (CSR) and environmental, social, and governance (ESG) standards, overtly anti-DEI positions may deter institutional investment and hinder long-term brand equity development.

Finally, activism, by its very nature, requires companies to lead social change and exert pressure on policymakers—this is the core essence and ultimate goal of activist strategy (Eilert and Nappier Cherup 2020). However, the phenomenon of DEI rollbacks raises significant concerns for both scholars and practitioners, as it shows that companies are not leading but rather reacting to socio-political pressures, appearing influenced by political decision-makers rather than shaping their policy agenda.

Therefore, for companies facing the complexities of DEI-related pressures, it is essential to approach these decisions with strategic foresight and a long-term perspective. Businesses should recognize that regressive activism carries not only reputational risks but also potential

operational and financial repercussions. To mitigate these risks, companies should engage in transparent communication, align internal practices with public commitments, and actively monitor the evolving socio-political scenario by adopting both micro and macro views. Additionally, businesses should invest in robust stakeholder engagement strategies, ensuring that responses to external pressures are thoughtful, balanced, and aligned with both current market expectations and future demographic and political shifts.

Conclusion and Future Directions

This study is among the first to examine and discuss the *dark side* of corporate activism. By adopting a comparative case study approach and leveraging news coverage from U.S. media outlets, it has been possible to identify and begin to understand the dynamics and consequences of a phenomenon that remains largely unexplored in the existing literature, generating important preliminary theoretical and practical implications. However, regressive activism requires further research to enhance its conceptualization, understand its political and social dynamics, capture additional corporate reactions, and, most importantly, analyze its consequences.

First, scholars should conduct more in-depth analyses of DEI rollbacks of the U.S. companies to determine the specific outcomes associated with different strategic choices - whether *progressive, passive,* or *regressive*. Our study did not focus on individual case studies nor employ empirical methods suited to assessing the impact of these decisions. Instead, it identified opinions, media narratives, and emerging trends that now require rigorous empirical investigation. Additionally, future research should analyze the social media profiles of companies within each identified cluster, assess consumer and investor perceptions, and determine whether financial consequences, including stock market performance, have occurred.

Second, scholars should understand how, to what extent, and under what conditions a country's political orientation influences the social role of corporations and shapes their social agendas. Multidisciplinary studies combining political science, sociology, and marketing are essential to developing this understanding.

Third, it is crucial to examine the specific actions taken by companies engaged in regressive activism, particularly focusing on their communication strategies across social media platforms. Understanding whether and how these firms publicly declare their decisions - or deliberately

avoid doing so - will improve the knowledge about transparency and communication to manage stakeholder reactions.

Fourth, we contend that it critical to understand whether the stance of activist companies is shifting in countries with political landscapes like that of the United States, characterized by polarization and populism. Comparative studies across different national contexts could reveal whether regressive activism is a localized phenomenon or part of a broader global trend.

Finally, we contend that there is a critical need to align corporate and brand activism research with these evolving dynamics, extending the conceptualization of authenticity to encompass instances where brands deliberately engage in regressive activism. This expanded framework would allow for a more comprehensive understanding of how authenticity is constructed, perceived, and operationalized within progressive, passive, and regressive corporate strategies, thereby offering deeper insights into the complexities of contemporary brand activism. In this regard, it could be essential to analyze the influence of cultural backlash on corporate activist positions. Understanding how societal resistance to progressive change affects corporate decision-making may provide valuable insights into the evolving relationship between business and society.

References

Al-Esia, Z., Crane, A., & Iatridis, K. (2024). Political CSR and populism: Toward an information-based theory of political CSR. *Business & Society*, *63*(2), 373-408.

Andersen, S. E., & Johansen, T. S. (2024). The activist brand and the transformational power of resistance: towards a narrative conceptual framework. *Journal of Brand Management*, *31*(2), 140-152.

Andrews, J. C., Burton, S., Gundlach, G. T., Hill, R. P., Kees, J., Netemeyer, R. G., & Walker, K. L. (2022). What exactly is marketing and public policy? Insights for JPPM researchers. *Journal of Public Policy & Marketing*, 41(1), 10–33.

Anderson, J. T., Sussman, K. L., & Song, Y. G. (2024). To Be Woke or Not to Be Woke? An Exploration of the Moral Foundations of Conservative Rejection of Brand Activism. *Journal of Interactive Advertising*, *24*(4), 368-381.

Appels, M., Edinger-Schons, L. M., & Korschun, D. (2024). Courageous Role Model or Threatening Villain: A Parallel Mediation Model of Corporate Activism and Citizen Political Engagement. *Business & Society*, 00076503241255691.

Arsel, Z., Crockett, D., & Scott, M. L. (2022). Diversity, equity, and inclusion (DEI) in the Journal of Consumer Research: A curation and research agenda. *Journal of Consumer Research*, *48*(5), 920-933.

Bhagwat, Y., Warren, N. L., Beck, J. T., & Watson IV, G. F. (2020). Corporate sociopolitical activism and firm value. *Journal of Marketing*, *84*(5), 1-21.

Branca, G., Grosso, M., & Castaldo, S. (2024). Value through diversity: A systematic literature review to understand diversity and inclusion in consumer research. *Psychology & Marketing*, *41*(11), 2854-2873.

Bulmer, S., Palakshappa, N., Dodds, S., & Harper, S. (2024). Sustainability, brand authenticity and Instagram messaging. *Journal of Business Research*, *175*, 114547.

Cammarota, A., Avallone, F., Marino, V., & Resciniti, R. (2024). Taking a stand or standing aside? How to conceptualize the emerging phenomenon of university activism. *The International Journal of Management Education*, *22*(3), 101014.

Chowdhury, R. M., Arli, D., & Septianto, F. (2024). How religiosity affects attitudes toward brands that utilize LGBTQ-themed advertising. *Journal of Business Ethics*, *193*(1), 63-88.

Crist, C. (2025). 1 in 8 companies say they plan to weaken DEI commitments in 2025. ESGDive, retrieved on February, 5th 2025 (https://www.esgdive.com/news/companies-to-weaken-dei-commitments-in-2025/738608/)

D'Arco, M., Cammarota, A., Marino, V., & Resciniti, R. (2024). How Do Consumers Respond to Brand Activism Campaigns? Exploring the Relationship Between Authenticity, Brand Value Congruence, Brand Identification, and Political Ideology. *Journal of Global Marketing*, 1-18.

Dover, T. L., Kaiser, C. R., & Major, B. (2020). Mixed signals: The unintended effects of diversity initiatives. *Social Issues and Policy Review*, *14*(1), 152-181.

Dumas, B. (2025). Is DEI dying? Here's the list of companies that have rolled back the 'woke' policies. Fox Business, retrieved on February, 5th 2025 (https://www.foxbusiness.com/markets/dei-dying-heres-list-companies-have-rolled-back-woke-policies)

Eilert, M., & Nappier Cherup, A. (2020). The activist company: Examining a company's pursuit of societal change through corporate activism using an institutional theoretical lens. *Journal of Public Policy & Marketing*, *39*(4), 461-476.

Eisenhardt, K. M. (1989). Building theories from case study research. *Academy of management review*, *14*(4), 532-550.

Feldmann, M., & Morgan, G. (Eds.). (2023). Business and populism: The odd couple?. Oxford University Press.

Gambetti, R. C., & Biraghi, S. (2023). Branded activism: Navigating the tension between culture and market in social media. *Futures*, *145*, 103080.

Gonzales, A. (2024). The Corporate Retreat From DEI: A Short-Sighted Strategy? Forbes, retrieved on February 5th, 2025 (https://www.forbes.com/sites/aliciagonzalez/2024/08/31/the-corporate-retreat-from-dei-a-short-sighted-strategy/)

Gray, H., Dolan, R., Wilkie, D. C. H., Conduit, J., & Burgess, A. (2024). Social purpose branding approaches: a typology of how brands engage with a social purpose. *European Journal of Marketing,* 58(5), 1207-1240.

Gupta, S., Danaher, P., Mittal, V., & Morrin, M. (2024). Mitigation in Marketing: Concept, Definition, and Scope. *Journal of Marketing Research*, 00222437241256710.

Guriev, S., & Triesman, D. (2022). Spin dictators: The changing face of tyranny in the 21st century. Princeton University Press.

Haupt, M., Wannow, S., Marquardt, L., Graubner, J. S., & Haas, A. (2023). Who is more responsive to brand activism? The role of consumer-brand identification and political ideology in consumer responses to activist brand messages. *Journal of Product & Brand Management*, *32*(8), 1248-1273.

Henderson, C. M., Mazodier, M., & Khenfer, J. (2023). The positive effects of integrated advertising, featuring diverse ensembles, on societal identification and mainstream brand value. *Journal of the Academy of Marketing Science*, 1-26.

Jonsen, I. D., McMahon, C. R., Patterson, T. A., Auger-Méthé, M., Harcourt, R., Hindell, M. A., & Bestley, S. (2019). Movement responses to environment: fast inference of variation among southern elephant seals with a mixed effects model.

Jung, J., & Mittal, V. (2020). Political identity and the consumer journey: A research review. *Journal of Retailing,* 96(1), 55–73.

Kelly, E., & Dobbin, F. (1998). How affirmative action became diversity management: Employer response to antidiscrimination law, 1961 to 1996. *American Behavioral Scientist*, 41(7), 960–984.

Konrad, A. M., & Linnehan, F. (1995). Formalized HRM structures: coordinating equal employment opportunity or concealing organizational practices?. *Academy of management journal*, *38*(3), 787-820.

Korschun, D., Martin, K. D., & Vadakkepatt, G. (2020). Marketing's role in understanding political activity. *Journal of Public Policy & Marketing*, *39*(4), 378-387.

Lee, Z., Spry, A., Ekinci, Y., & Vredenburg, J. (2024). From warmth to warrior: Impacts of non-profit brand activism on brand bravery, brand hypocrisy and brand equity. *Journal of Brand Management*, *31*(2), 193-211.

Lewis, N., & Vredenburg, J. (2023). Contemporary Consumption of Brand Activism. In *The Future of Consumption: How Technology, Sustainability and Wellbeing will Transform Retail and Customer Experience* (pp. 263-280). Cham: Springer International Publishing.

Lou, C., Goh, E. Y. S., Chang, D., Tan, H. L., Yap, X. Y., & Zhang, X. (2024). What Is Brand Activism? Explicating Consumers' Perceptions of Its Characteristics, Authenticity, and Effectiveness. *Journal of Interactive Advertising*, 1-14.

Martin, K., & Burpee, S. (2022). Marketing as a problem solver: In defense of social responsibility. *AMS Review,* 12, 44-51.

McKean, A. E., & King, B. G. (2024). When ideologies align: Progressive corporate activism and within-firm ideological alignment. *Strategic Management Journal*, *45*(12), 2459-2518.

Miles, M. B. (1994). Qualitative data analysis: An expanded sourcebook. *Thousand Oaks*.

Mirzaei, A., Wilkie, D. C., & Siuki, H. (2022). Woke brand activism authenticity or the lack of it. *Journal of Business Research*, *139*, 1-12.

Moffitt, B. (2020). Populism. Polity Press

Moorman, C. (2020). Commentary: Brand activism in a political world. *Journal of Public Policy & Marketing,* 39(4), 388–392.

Norris, P., & Inglehart, R. (2019). *Cultural backlash: Trump, Brexit, and authoritarian populism*. Cambridge University Press.

Özbilgin, M. F., Erbil, C., & Gündoğdu, N. (2024). Political tie diversity and inclusion at work in Asia: a critical view and a roadmap. *Asian Business & Management*, *23*(3), 374-392.

Pless, N., & Maak, T. (2004). Building an inclusive diversity culture: Principles, processes and practice. *Journal of business ethics*, *54*, 129-147.

Podnar, K., & Golob, U. (2024). Brands and activism: ecosystem and paradoxes. *Journal of Brand Management*, *31*(2), 95-107.

Portocarrero, S., & Carter, J. T. (2022). Diversity initiatives in the US workplace: A brief history, their intended and unintended consequences. *Sociology Compass*, *16*(7), e13001.

Pöyry, E., & Laaksonen, S. M. (2022). Opposing brand activism: triggers and strategies of consumers' antibrand actions. *European Journal of Marketing*, *56*(13), 261-284.

Sallai, D., Morgan, G., Feldmann, M., Gomes, M., & Spicer, A. (2024). Social challenges for business in the age of populism. *Business & Society*, *63*(2), 279-299.

Sarkar, C., & Kotler, P. (2020). *Brand activism: From purpose to action*. Idea Bite Press.

Sherman, N. (2024). Why tech bros are turning to Trump. BBC News, retrieved on February 15 th 2025 (https://www.bbc.com/news/articles/cd1j8dvw73lo)

Stake, R. E. (2013). *Multiple case study analysis*. Guilford press.

Tsougkou, E., Sykora, M., Elayan, S., Ifie, K., & Oliveira, J. S. (2025). Peace brand activism: global brand responses to the war in Ukraine. *Journal of Public Policy & Marketing*, *44*(1), 100-121.

Villanova, D., & Matherly, T. (2024). For shame! Socially unacceptable brand mentions on social media motivate consumer disengagement. *Journal of Marketing*, *88*(2), 61-78.

Vredenburg, J., Kapitan, S., Spry, A., & Kemper, J. A. (2020). Brands taking a stand: Authentic brand activism or woke washing?. *Journal of public policy & marketing*, *39*(4), 444-460.

Wagner, T., Korschun, D., & Troebs, C. C. (2020). Deconstructing corporate hypocrisy: A delineation of its behavioral, moral, and attributional facets. *Journal of Business Research*, *114*, 385-394.

White, D. R., & Schafer, J. A. (2024). Police leaders' support for civilian oversight and implicit bias training: assessing the influence of perceptions of systemic racism. *Police Practice and Research*, 1-15.

Yin, R. K. (2003). Designing case studies. *Qualitative research methods*, *5*(14), 359-386.

Revisiting the Resource-Advantage Theory: Incorporating Wroe Alderson's Insights and Service-Dominant Logic

Noriaki Saito

Masato Shoji

Kazuo Kikuchi

Abstract

The Resource-Advantage (R-A) theory, proposed by S.D. Hunt, has been lauded as a dynamic and evolutionary framework for explaining competitive advantage in real-world markets. However, critics argue that the theory lacks practical applicability in marketing strategy, particularly in addressing consumer heterogeneity and the complexity of exchange processes. This study revisits R-A theory by incorporating insights from Wroe Alderson's heterogeneous demand theory and differential advantage theory, along with key perspectives from Service-Dominant Logic (S-D Logic). By integrating these perspectives, this study aims to refine R-A theory's capacity to account for heterogeneous demand and enhance its practical utility in marketing practice and strategic decision-making.

Introduction

The Resource-Advantage (R-A) theory, introduced by S.D. Hunt in the mid-1990s, was developed as a general of competition to address the shortcomings of neoclassical economics. Hunt's work culminated in his seminal book *A General Theory of Competition* (2000), where he positioned R-A theory as a superior alternative to the static assumptions of perfect competition models. The theory emphasizes resource heterogeneity, dynamic competition, and innovation-driven growth as core tenets. However, while R-A theory has been recognized for its academic rigor, it has faced significant criticisms. Scholars such as Wensley (2002) and Foss (2000) have pointed out its abstract nature and questioned its relevance to practical marketing phenomena.

A major critique centers on the theory's inability to fully incorporate consumer heterogeneity and the exchange processes essential to marketing. Savitt (2000) argues that Hunt's framework inadequately addresses the dynamic interplay between firms and consumers, a critique echoed by Wensley's (2002) call for greater integration of demand-side factors. This study revisits these issues by proposing a theoretical synthesis of R-A theory with Alderson's heterogeneous demand theory, offering a more consumer-centric and actionable perspective for marketing practice.

Theoretical Background

The Resource-Advantage Theory

R-A theory posits that competition is an evolutionary process where firms strive to achieve superior financial performance by acquiring and leveraging heterogeneous resources. Unlike perfect competition models, R-A theory accounts for the dynamic nature of competitive advantage. Its emphasis on resource heterogeneity and innovation makes it particularly relevant to modern markets characterized by diversity and change. However, its focus on supply-side dynamics often overlooks the role of consumer preferences and behaviors, limiting its explanatory power in marketing contexts.

Wroe Alderson's heterogeneous demand theory

Alderson, a pioneer in marketing theory after WW Ⅱ, emphasized the importance of consumer heterogeneity and the role of differentiation in creating value. His work on sorting processes and functional approaches to marketing highlighted the dynamic interactions between consumers and firms. Alderson's theories align with the R-A framework's emphasis on heterogeneity but provide a more detailed focus on consumer exchange processes and market segmentation. Integrating these perspectives could address the gaps in R-A theory and enhance its applicability to marketing strategy.

Critique of R-A Theory

Several limitations hinder the practical application of R-A theory in marketing. First, its conceptualization of consumer heterogeneity remains underdeveloped. While it acknowledges the importance of market segmentation, it does not offer actionable tools or frameworks for identifying and leveraging consumer diversity. Second, the theory's focus on resource acquisition and competitive positioning neglects the importance of consumer exchange processes. Marketing, fundamentally, revolves around creating and delivering value to consumers, a dimension that is insufficiently explored in R-A theory. Finally, the theory's abstract nature poses challenges for its adoption by practitioners, who require concrete guidelines for strategy formulation and execution.

Proposed Integration

This study proposes a synthesis of R-A theory with Alderson's heterogeneous demand theory to address its limitations. By incorporating Alderson's emphasis on sorting processes and

consumer exchange dynamics, the integrated framework aims to provide a more holistic understanding of competition and marketing phenomena. Key components of this integration include:

1. Consumer-Centric Resource Assessment: Extending R-A theory's resource evaluation to include consumer insights and preferences as critical inputs. This approach emphasizes aligning a firm's resource allocation with the diverse and evolving needs of consumers, ensuring that marketing strategies are directly informed by market realities.

2. Exchange-Oriented Competition: Reframing competition as a process driven not only by resource superiority but also by the ability to facilitate value-creating exchanges between firms and consumers. This perspective shifts the focus from internal resource optimization to the dynamic interactions that generate consumer satisfaction and loyalty.

Discussion

This study explores integrating Wroe Alderson's heterogeneous demand theory and S-D Logic into S.D. Hunt's R-A theory to address its limitations in marketing contexts. By emphasizing consumer-centric resource assessment, exchange-oriented competition, and service-for-service exchange, this integration aims to provide a more holistic framework for understanding competition and marketing phenomena.

A foundational premise of S-D Logic is that service is the fundamental basis of exchange, shifting the focus from goods to the value co-creation processes between firms and consumers. Moreover, integrating S-D Logic reinforces the role of consumers as a resource integrator.

These reframing positions competition not solely as a pursuit of resource superiority but as a collaborative effort to create mutual value through interactions.

Future research should explore how this integrated framework can inform marketing strategy, particularly in rapidly evolving contexts such as digital platforms and service ecosystems. Empirical studies could validate how service-oriented competition drives long-term competitive advantage.

References

Alderson, W. (1957), *Marketing Behavior and Executive Action: A Functionalist Approach to Marketing Theory.* Richard D. Irwin, Inc.

Foss, N. (2000), "Equilibrium vs. Evolution in the Resource-Based Perspective: The Conflicting Legacies of Demsetz and Penrose." *Journal of Management Studies,* 37(8), 1177-1200.

Hunt, S. D. (1995), "The resource-advantage theory of competition: toward explaining productivity and economic growth," Journal of Management Inquiry, Vol.4, No.4, pp.317-332

Hunt, S.D. (2000), *A General Theory of Competition: Resources, Competences, Productivity, Economic Growth.* Sage Publications.

Lusch, R. F. and Vargo, S. L. (2014). Service-Dominant Logic: Premises, Perspectives, Possibilities. Cambridge University Press.

Savitt, R. (2000), "A Philosophical Essay About A General Theory of Competition?" *Journal of Macromarketing,* 20(1), 73-76.

Wensley, R. (2002), "Marketing for a New Century: Comments on A General Theory of Competition." *Journal of Marketing Management,* 18(1-2), 229-237.

Sacred Choices Amid Profane Systems: Autonomy in Pre-Mortem End-of-Life Planning

Amy Errmann

"Death marks the omega point for consumption, a guillotine on the procurement and use of artefacts, and a fate that seemingly can neither be bartered nor bartered with."

– Darach Turley, A postcard from the very edge, mortality and marketing, 1997

What if death, instead of being an inevitable endpoint, became a deeply meaningful resolution— where individuals curate their final moments to reclaim autonomy, ritualize, and face off this ultimate transition. Pre-mortem end-of-life planning transforms death from an inevitable endpoint into a curated and intentional event, where individuals assert agency over their final moments. While death remains immutable, modern systems and practices offer consumers new tools to reclaim autonomy, shaping how they plan, ritualize, and imbue this ultimate transition with meaning. From Canada's medical assistance in dying (Government of Canada 2024) to Switzerland's forest death pods (BBC 2024) and bespoke ceremonies on for couples choosing to end it together (BBC 2024), pre-mortem planning has evolved into a deeply symbolic act mediated by institutions, families, religious systems, and broader cultural networks (Ariès 1975; Walker 2011). This research explores how these systems act as either profane barriers or enablers of sacred autonomy in end-of-life planning.

Building on the sacred-profane framework (Belk et al. 1989) and liminality (Turner and Abrahams 2017), this research examines how the individual negotiates autonomy within institutionalized structures, navigating the tension between logistical constraints and the deeply personal nature of this planning. While systems such as legal frameworks, healthcare protocols, religious norms, and familial expectations often impose profane barriers—standardizing, commodifying, or constraining sacred intent—they can also enable sacredness by legitimizing choices, alleviating logistical burdens, and facilitating meaningful rituals. For instance, pre-mortem planning practices like legacy donations, symbolic bequests, and digital memorials reflect identity preservation and continuity (Turley 1997), resonating with terror management theory (Greenberg et al. 1997) by easing existential anxieties and affirming autonomy.

This research also highlights how collaborative systems—family, friends, and healthcare professionals—can either affirm sacred intentions or dilute them through competing priorities,

conflicts, or misunderstandings (Turley and O'Donohoe 2012). For some, the involvement of external actors creates communitas (Turner and Abrahams 2017)—a shared emotional space enhancing sacredness—while for others, these systems may introduce tensions that undermine the individual's autonomy, reducing the sacred act of planning to a series of profane negotiations.

Methodology:

This study employs a thematic analysis (Braun and Clarke 2012) of over 500,000 public posts collected via Crowdtangle from twelve of Facebook's 'End of Life Planning' groups, examining how individuals articulate their desires for autonomy, meaning, and ritual in pre-mortem planning. Sacred themes, such as personalization, ritualization, and identity preservation, are analysed alongside profane barriers, such as institutional red tape, familial resistance, and religious prohibitions. Preliminary findings suggest that consumers navigate these tensions through complex negotiations, using systems to both mediate and subvert profane constraints. Future research will include in-depth interviews with individuals engaged in pre-mortem planning to uncover how they balance autonomy with systemic influence.

Contribution:

This research extends knowledge of pre-mortem end-of-life planning as a site of transformative consumption where individuals navigate autonomy within institutionalized systems. It enriches theories of sacred consumption (Belk et al.1989), identity extension (Belk 1988), and liminality (Turner and Abrahams 2017) by demonstrating how systemization shapes the negotiation of sacredness and autonomy in profound life transitions. Additionally, it advances understanding of terror management theory (Greenberg et al. 1997) by illustrating how consumers reconcile existential anxieties through curated rituals and system-enabled choices.

Theoretical and Managerial Implications:

Theoretically, this research highlights the dialectical relationship between sacred and profane consumption, demonstrating how systemic structures both constrain and empower individual agency in pre-mortem planning. It reveals the complexities of negotiating autonomy and meaning within collaborative and institutionalized frameworks, offering new insights into structure and agency in consumer behaviour. Managerially, the findings provide practical

guidance for organizations and service providers to design systems that respect individual autonomy, minimize profane barriers, and enhance the sacredness of end-of-life planning. As the global demand for personalized and system-supported end-of-life services grows, understanding how consumers navigate these dynamics is critical for fostering trust and ethical engagement.

By situating pre-mortem planning as a sacred act mediated through profane systems, this study illuminates how consumers assert autonomy and craft meaning in one of life's most profound transitions.

References

Ariès, P. (1975), *Western Attitudes Toward Death: From the Middle Ages to the Present* (Vol. 3). JHU Press.

Belk, R. W. (1988), "Possessions and the Extended Self," *Journal of Consumer Research*, 15(2), 139-168.

Belk, R. W., Wallendorf, M., & Sherry Jr, J. F. (1989), "The Sacred and the Profane in Consumer Behavior: Theodicy on the Odyssey," *Journal of Consumer Research*, 16(1), 1-38.

Braun, V., & Clarke, V. (2012), *Thematic Analysis*. American Psychological Association.

British Broadcasting Corporation (2024), "Dying Together: Why a Happily Married Couple Decided to Stop Living," https://www.bbc.com/news/articles/c0jjq2vynq7o.

British Broadcasting Corporation (2024), "Maker of Suicide Pod Plans to Launch in Switzerland," https://www.bbc.com/news/technology-59577162.

Government of Canada (2024), "Medical Assistance in Dying, an Overview," https://www.canada.ca/en/health-canada/services/health-services-benefits/medical-assistance-dying.html.

Greenberg, J., Pyszczynski, T., & Solomon, S. (1997), "Terror Management Theory of Self-Esteem and Cultural Worldviews: Empirical Assessments and Conceptual Refinements," *Advances in Experimental Social Psychology*, 29, 61-139.

Turley, D. (1997), "A Postcard from the Very Edge: Mortality and Marketing," *Consumer Research: Postcards from the Edge*, 350.

Turley, D., & O'Donohoe, S. (2012), "The Sadness of Lives and the Comfort of Things: Goods as Evocative Objects in Bereavement," *Journal of Marketing Management*, 28(11-12), 1331-1353.

Turner, V., Abrahams, R., & Harris, A. (2017), *The Ritual Process: Structure and Anti-Structure*. Routledge.

Walker, L. J. (2011), "Pre-Mortem Planning: Creating the Family Care Culture," *Journal of Financial Planning*, 24(2).

Scarcity, Limits, and Degrowth: Which Way Forward?

Kristoffer Wilén

If one is concerned about ecological sustainability, then the notion and presupposition of scarcity is at first sight likely to make a whole lot of sense, near common sense. For is not "humanity" currently consuming 1.5 Earth's worth of natural resources annually, with the wealthy being particularly responsible for overconsumption? Yes. As the Earth is finite and has its limits, it is tempting to think that the notion of scarcity should be embraced and seen as a building block for politics and political struggles for strong ecological sustainability.

In this conceptual paper I will explore how the notions of scarcity and limits have been used to shape debates in academia and environmental politics on sustainability and degrowth: what can / cannot be done? What should / should not be done? And by whom? I will show how a perspective of limits is to be preferred over scarcity. But how? How should degrowth and macromarketing deal with limits?

Much of the debate on ecological sustainability is still informed by ideas from neoclassical economics (Spash 2024). Nowhere is the influence stronger than on questions concerning scarcity (Achterhuis 1993, Mehta 2010). Neoclassical economics sees scarcity as a persistent condition in the economy, or indeed in the entire world (Robbins 1932). Accordingly, the task of the economy is seen to be the allocation of scarce goods as efficiently as possible. Yet, as a part of the very rationale of theorising scarcity, this theory accepts consumer preferences as given. This leads to formulating the theoretical problem as the problem of finding the most efficient way to allocate goods given any existing consumer preferences. An alternative ontological approach would be to take the existing resource pool as the theoretical entry point. Thus, the question about sustainable economy would be framed as 'what can be produced given the existing resource pool', which is not scarce but limited or finite, rather than 'given the existing consumer preferences, how are goods produced most efficiently'.

Within macromarketing Shapiro (1978 and 2012) has done critical pioneering work on sustainability, needs and need satisfiers. This paper is an attempt to follow in Shapiro's footsteps and build upon them by highlighting the importance of problematizing scarcity when discussing and doing research on ecological sustainability, and not to automatically equate scarcity with something that is limited and finite (Varey 2012). Finite and limited is not the same as scarce, as the notion of scarcity makes no reference to absolute limits or questioning preference satisfaction

as the ultimate goal. The meaning of scarcity is often taken as intuitively clear. But in closer inspection, scarcity is not a self-standing phenomenon or anything as such, rather it is always a relationship between means and ends. Means are resources of various kinds and ends are needs, which neoclassical theory confuses with wants and desires, or "preferences" in economics parlance. Scarcity thus imply that means and ends do not match, but neoclassical theory accepts only the prior element in this relationship as a legitimate object of analysis. Preferences are taken as given in the sense that they cannot be questioned, changed, and/or that they are potentially unlimited. In this view, the only thing that causes scarcity, are the means (resources), of which there is always too little (hence the need to make trade-offs, a prominent part of economic theory). Scarcity is then a specific worldview inherent within neoclassical economics, but not limited to it.

It is symptomatic that the idea of limits is today deemed frightening by environmentally minded policy officers, managers, and economists in various organisations (Bina 2013). The UN's "green economy" project and discourse is a good example of this. According to Bina (2013), it is no coincidence that the 'planetary boundaries' framework by Rockström et al. (2009) was removed on the very last minute from the official report and policy documents on the "green economy". The 'planetary boundaries' approach can be criticised for many reasons, but the reason for abandoning it was exactly its reference to explicit ecological limits, which human activity and economy should respect and not cross. It is therefore not surprising that the problems and proposals in the "green economy" are instead explicitly framed through the lens of scarcity (Bina 2013).

But even 'limits' has its limits (Mehta 2010). A significant challenge concerning limits is how to design actual policies. There is a danger that limits could be proposed and imposed in a top-down technocratic and even (eco)authoritarian fashion. How to conceptualise human activities restrained by e.g. ecological limits? In this sense 'limits' are an external imperative, hence: humans should/must change their social systems so that they become ecologically more sustainable. Are there alternatives to 'external limits', which might enable humans to change their social systems, not because 'they have to', but because 'they want to' – as something they choose. Would the political potential of such a motivation be greater?

I argue that degrowth offers some promising alternative perspectives for dealing with these questions: sufficiency (Princen 2005) and self-limitation (Kallis and March 2015).

Sufficiency is about having "enough". As an idea, it predates the modern idea of scarcity. While pre-19th century societies were forced to struggle with resource shortages (for example concerning food) every now and then, these were considered exceptional periods, rather than manifestations of scarcity as an omnipresent condition. People survived them together by suffering together. Societies first and foremost decide what is scarce and what is not, and how needs or wants and desires – to a certain degree – develop and are influenced (Sahlins 1972). One should therefore ask: what is lacking and for what purposes? An economics of strong sustainability does not ask, how to produce more efficiently what people happen to want, but recasts the question, what is really needed for meeting human needs. Scarcity is a socially produced condition, not absolute in the sense of a general condition of humankind. For example, is food scarce today? There is plenty of food even to waste. Hence the Gandhian quote 'The world has enough for everybody's need, but not for everybody's greed' (Guha 1995). Since the pursuit of growth is a major driver of ecological destruction and the poorest are hit the hardest by this, scarcity versus redistribution thus becomes a question of environmental justice.

Another way to approach limits is through the idea of self-limitation, which are 'collective decisions to refrain from pursuing all that could be pursued' (Kallis 2017, p. 21). To put it more concretely: to decide and choose that 'we have enough', rather than being forced by an external force such as nature. For Castoriadis (2010, p. 203), 'ecology isn't ''love of nature'': it's the need for self-limitation (which is true freedom) of human beings with respect to the planet on which they happen to exist by chance, and which they are now destroying.'

Clearly there is case to be made in arguing for limits, but in what ways and which situations can the 'external imperative' of limits go together with more internal motivations of choosing / wanting to change social systems?

References

Bina, Olivia (2013), The Green Economy and Sustainable Development: An Uneasy Balance?. Environment and Planning C: Government and Policy, 31(6), 1023–1047.

Castoriadis, (2010), A Society Adrift. Interviews and Debates, 1974-1997. New York: Fordham University Press.

Guha, Ramachandra (1995), "Mahatma Gandhi and the environmental movement in India", in Environmental movements in Asia (pp. 65-82). Routledge.

Hans, Achterhuis (1993), “Scarcity and sustainability”, in Global Ecology: A New Arena of Political Conflict, Sachs, Wolfgang. ed. London, UK: Zed Books, 104-116.

Kallis, Giorgos and March, Hug (2015), "Imaginaries of Hope: The Utopianism of Degrowth," in Annals of the American Association of Geographers, 105(2), 360-368.

Kallis, Giorgos (2017), In defense of degrowth: Opinions and Minifestos. Uneven Earth Press.

Mehta, Lyla, ed. (2010), The Limits to Scarcity Contesting the Politics of Allocation. London: Earthscan.

Princen, Thomas (2005), The Logic of Sufficiency. London: The MIT Press.

Robbins, Lionel (1932), An essay on the nature and significance of economic science. London: Macmillan and Co.

Rockström, Johan. et al. (2009), “A safe operating space for humanity”, Nature, 461(7263), 472–475.

Sahlins, Marshall (1972), Stone Age Economics. London: Tavistock.

Shapiro, Stanley J. (1978), “Marketing in a conserver society”, Business Horizons, 21(2), 3-13.

Shapiro, Stanley (2012), “Revisiting marketing in a conserver society”, Social Business, 2(1), 11-37.

Spash, Clive (2024), Foundations of social ecological economics: The fight for revolutionary change in economic thought. Manchester: Manchester University Press.

Varey, Richard J. (2012), “The Marketing Future beyond the Limits of Growth”, Journal of Macromarketing, 32(4), 424-433.

Second-Hand Clothing Consumption and Circular Economy

Aline Souza Magalhães

Isabela Carvalho de Morais

Karin Brondino-Pompeo

Abstract

The advancement of production and technology has intensified consumption, fostering an unsustainable economic model. The Circular Economy (CE) emerges as an alternative, promoting product longevity and reuse. The textile industry, particularly fast fashion, is a major polluter, and second-hand clothing consumption has gained traction as a sustainable alternative. This study explores the motivations behind second-hand clothing consumption and its relationship with CE. A qualitative approach was adopted, involving participant observation in thrift stores, in-depth interviews with eleven Brazilian consumers and thrift store entrepreneurs, and documentary analysis. Findings reveal that thrift stores increasingly resemble traditional retail, and consumers are driven by twelve motivations categorized into symbolic, fun-related, social status, and value perception groups. This study expands existing literature on second-hand clothing, highlighting underexplored areas in CE, such as reuse practices and consumers' perspectives. It contributes to discussions on consumption behaviours and sustainability transitions.

Keywords: Second-hand clothing, Circular Economy, Thrift stores, Sustainable consumption

Introduction

Since the Industrial Revolution, advancements in production and technology have significantly increased access to products. However, this progress also fostered an economic model rooted in production and consumption, where wealth and happiness became closely associated with consumption (Connell 2019). The rise of neoliberal capitalism exacerbated this dynamic, creating constant needs that drive consumers to purchase and discard products at an accelerating pace (Benson 2000). This model has proven unsustainable given the planet's environmental limits (Global Warming Focus 2019, Rockström et al. 2009, Steffen et al. 2015, Wang-Erlandsson et al. 2022).

The focus on economic growth based on production and consumption has shaped a society with social and environmental issues. In response, the Circular Economy (CE), based on production, use, and disposal of goods, emerges to counter the linear model (Welch, Keller, and

Mandich 2017). In CE, products at the end of their life cycle are transformed into resources for new goods, within a sufficiency-based production model (Ellen MacArthur Foundation 2013). This strategy also aims to extend product longevity and reduce consumption (Garcia et al. 2021, Kirchherr, Reike and Hekkert 2017, Maitre-Ekern and Dalhammar 2019).

CE strategies align closely with macromarketing, especially in their emphasis on systemic rather than individual perspectives. Both advocate for a holistic understanding of economic and societal dynamics, moving beyond micro-level analyses (Kemper, Moscato, and Kennedy 2022). Research in macromarketing has addressed economic development, sustainability (including CE and consumption), and globalization (DeQuero-Navarro et al. 2020), which are also central to CE. These shared concerns highlight potential for cross-disciplinary insights. This study focuses on consumers, recognizing their pivotal role in shaping and sustaining new economic paradigms.

Moreover, this research addresses a gap in macromarketing literature by exploring how symbolic consumption connects to sustainable societal development. It remains a challenge for researchers and practitioners to understand how environmental concerns are represented and emphasized through symbolic consumption (Ekström and Salomonson 2014). By aligning CE strategies with symbolic aspects of consumption, this study expands the scope of macromarketing research.

The textile industry, driven largely by fast fashion, is one of the most polluting globally (Farahani, Asgari and Wassenhove 2022). Since the 1980s, the life cycle of clothing has shortened (Napier and Sanguineti 2018). Clothing consumption is expected to grow significantly by 2030 (Environmental Audit Committee 2019). One approach to advancing CE in fashion is to promote second-hand clothing markets. This form of consumption has seen a decline in stigma, contributing to its growing appeal (Felippe and Feil 2020, Thredup 2022, Valor, Ronda and Abril 2022).

Thrift stores play a key role in enabling a circular model, but consumer action is essential to make CE effective—whether through donations, purchases, or sales (Hamilton 2010, Juana et al. 2018, Lakatos et al. 2016, Lehner et al. 2020, Muranko et al. 2018, Russo et al. 2019). Although consumers aim to be more sustainable, environmental concerns may not be their only motivation for buying second-hand (Kapusy and Lógó 2020, Wang, Fu and Li 2022). This study explores: What drives second-hand clothing consumption? How do consumer practices and motivations relate to sustainability and CE?

A qualitative approach was employed (Belk, Fischer and Kozinets 2013). Data collection included participant observation in thrift stores, enabling immersion and contextual exploration. In-depth interviews were conducted with eleven consumers, some also thrift store entrepreneurs. Additionally, documentary analysis focused on the general clothing market and second-hand clothing dynamics.

As a result, thrift stores were characterized, and the analysis revealed that they increasingly mirror traditional retail in operation and presentation. Also, twelve motivational elements were identified and grouped into four categories: symbolic, fun-related, social status, and value perception. Each was classified as positive, neutral, or negative for CE transition.

This work complements prior studies on second-hand clothing consumption (e.g., Camacho-Otero, Pettersen and Boks 2020, Felippe and Feil 2020, Ha-Brookshire and Hodges 2009, Kapusy and Lógó 2020, Lehner et al. 2020, Thredup 2022, Valor et al. 2022, Wang et al. 2022) and on CE (Alcalde-Calonge, Sáez-Martínez and Ruiz-Palomino 2022, Garcia et al. 2021, Ghisellini, Cialani and Ulgiati 2016, Kirchherr et al. 2017, Maitre-Ekern and Dalhammar 2019, Muranko et al. 2018). Given that CE studies often focus on sustainable production, this research highlights underexplored areas such as reuse and consumer perspectives on second-hand purchases (Kirchherr et al. 2017, Garcia et al. 2021, Magalhães et al. 2021). It also examines the symbolic value behind second-hand consumption beyond sustainability discourses.

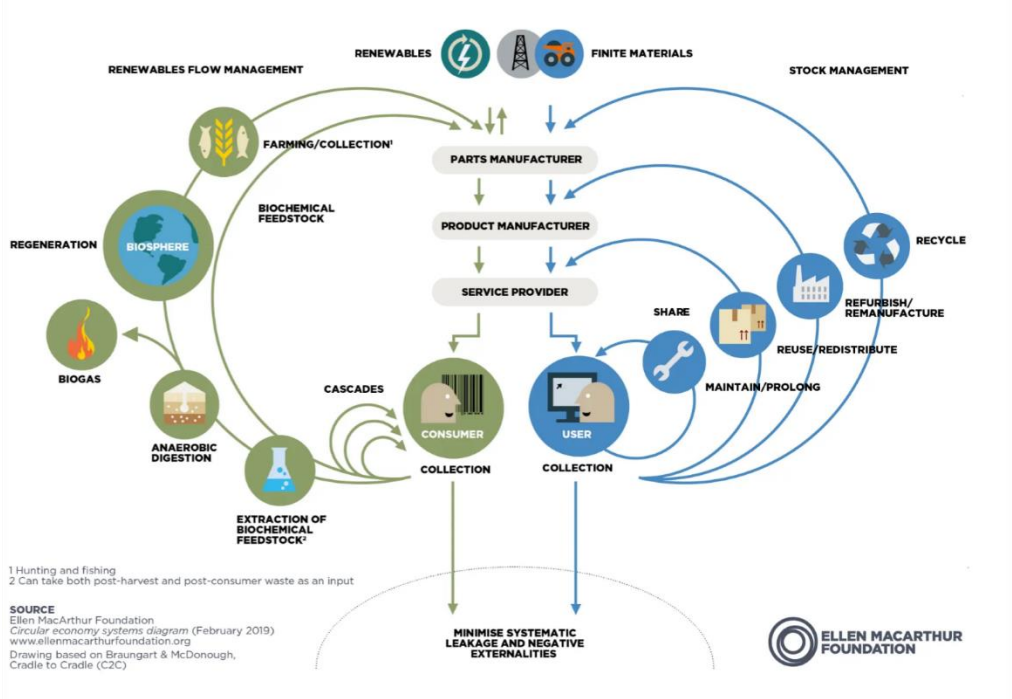
This paper is structured as follows: the next section presents the theoretical framework on CE, consumption, and fashion, followed by methodology and results. The final section provides the conclusion.

Circular Economy

The concept of the Circular Economy (CE) dates to the 1960s (Sariatli 2017), emerging as a sustainable alternative to the resource-exploitative linear model. Circular Economy emphasizes operating resources in a closed-loop system (Patwa et al. 2021). The Ellen MacArthur Foundation (2019) conceptualizes CE through a hierarchy of activities, placing the consumer at the centre (Figure 1). In this model, consumers play a dual role as both consumers and suppliers (Euromonitor 2020, Gopalakrishnan and Matthews 2018).

Figure 1

Circular Economy Butterfly Diagram



Source: Ellen MacArthur Foundation (2019)

Kirchherr et al. (2017) conceptualized CE as:

[…] an economic system that replaces the 'end-of-life' concept with reducing, alternatively reusing, recycling and recovering materials in production/distribution and consumption processes. It operates at the micro level (products, companies, consumers), meso level (eco-industrial parks) and macro level (city, region, nation and beyond), with the aim to accomplish sustainable development, thus simultaneously creating environmental quality, economic prosperity and social equity, to the benefit of current and future generations. It is enabled by novel business models and responsible consumers (p. 229).

Within the framework of CE activities, a hierarchical approach should ideally be established, with reduction prioritized as the foremost strategy. Only when reduction is unfeasible should alternative actions such as reuse, recycling, and recovery be considered, in that specific order (Garcia et al. 2021). Thus, reduction and reuse stand as the primary CE strategies, both of which characterize second-hand clothing consumption.

Despite growing interest in sustainable development and heightened attention to climate-related challenges, circular practices remain sporadic and have not yet become part of

consumers' daily routines (Rabiu and Jaeger-Erben 2022). While discussions surrounding the CE have tripled over the past five years, global circularity has declined: from 9.1% in 2018 to 7.2% in 2023. This downward occurs due the fact that, although circular processes are advancing, the linear economy continues to expand at a faster rate (The Circularity Gap Report 2024). The concurrent growth of both circular and linear systems suggests an overall increase in global production and consumption levels, regardless of whether these practices are sustainable.

Fashion and clothing consumption

Second-hand clothing consumption embodies reuse, a core principle of CE. Moreover, it reduces the extraction of natural resources, as purchasing second-hand clothing may decrease the purchase of new garments. By diminishing demand for new clothing, the need for virgin materials in production is avoided. In this way, another fundamental CE strategy—reduction—is indirectly supported.

According to Potting et al. 2017, reduction refers to increasing efficiency in product manufacturing or usage by minimizing consumption of natural resources and raw materials. Reuse, in turn, involves utilization of discarded products by new consumers, provided the items remain in good condition and fulfill their original function. In this context, reuse operates at the consumption level, while reduction applies to production processes (Euromonitor 2020, Gopalakrishnan and Matthews 2018).

Consumption is deeply embedded in contemporary culture (Fontenelle 2017), leading to its naming as "the consumer society" (Baudrillard 1995, Fontenelle 2017). Beyond their functional purpose, garments serve as vehicles for cultural identity, self-expression, and social distinction (Belk 1988). The fashion industry has witnessed a significant increase in consumption, raising concerns about social and environmental implications. Between 2000 and 2015, global clothing sales doubled, yet the frequency garments were worn declined by 40% (Ellen MacArthur Foundation 2022).

Given the symbolic significance of clothing and other consumer goods, corporations strategically leverage identity-building to stimulate demand, fostering a culture where individual complexity is reduced to consumption patterns (Brondino-Pompeo 2022). In consumer societies, the intrinsic meaning of products is eroded, feeding a cycle of temporary gratification through

consumption and an ongoing sense of unfulfilled desire (Hamilton 2010, Benson 2000, Kasser et al. 2014).

The environmental consequences of fashion consumerism are profound. The industry's extensive supply chain is one of the most polluting, heavily dependent on non-renewable resources, including petroleum for synthetic fabrics, fertilizers for cotton cultivation, and chemicals for textile dyeing and finishing (Ellen MacArthur Foundation 2019). Moreover, the industry has been plagued by ethical concerns, with reports of labor exploitation, such as the Rana Plaza disaster in Bangladesh (Shahnaz 2014) and the exploitation of migrant garment workers in Brazil (Carrança 2020), underscoring the urgent need for systemic reform in fashion production and labor practices.

As a response to fast fashion, the exchange and sale of second-hand clothing are growing in popularity (Euromonitor 2022, SEBRAE 2022, Thredup 2022). Despite its recent growth, this practice has been common among certain communities for many years, particularly among marginalized groups (Hansem 2000, Leite 2021). Although it once carried a negative stigma, this perception is gradually fading (Lourenço and Moraes 2022, Mello 2019, Felippe and Feil 2020, Rulikova 2020, Valor et al. 2022, Xu et al. 2014, Yan, Bae and Xu 2015). Reasons driving the popularity of thrift stores include: economic crises; pursuit of value for money; climate change concerns; brand and fast fashion boycotts; and the desire for exclusivity (Cervellon, Carey and Harms 2012, Valor et al. 2022, Wang et al. 2022, Willersdorf et al. 2020, Xu et al. 2014, Yan et al. 2015). Furthermore, the rise of social media and online marketplaces has facilitated consumer-to-consumer clothing sales and enabled entrepreneurs to use social networks as digital storefronts (SEBRAE 2020).

The global second-hand clothing, footwear, and accessories market is valued at $30–40 billion (Willersdorf et al. 2020). In 2018 and 2019, 24% and 25% of the population in developed countries, respectively, purchased at least one second-hand garment (Willersdorf et al. 2020). In 2021, global sales of second-hand clothing experienced unprecedented growth (Thredup 2022). By 2026, the global second-hand clothing market is projected to grow three times faster than the traditional apparel industry, and in South America, up to four times faster (Thredup 2022). In Brazil, charity shops, such as those run by churches or animal welfare organizations, have long been common. However, in recent years, for-profit thrift stores have expanded significantly.

Between 2010 and 2015, thrift store numbers and second-hand clothing sales combined grew by 210% (SEBRAE 2020).

Although individuals are often aware of climate change, its origins, and consequences, they may not be prepared to alter lifestyles accordingly. In the context of second-hand clothing consumption, appeals to environmental benefits or frugality are less compelling compared to the thrill of entertainment and the experience of treasure hunting (Wang et al. 2022). The symbolic value of consumption outweighs its functional or environmental benefits (Santamaria et al. 2016). Amplifying green marketing might further encourage consumption by alleviating guilt, resulting in "green consumerism" without questioning the necessity of consumption itself (Akenji 2014).

In the context of second-hand clothing purchases, sustainability tends to function as an appealing feature rather than a must-be attribute for most consumers. While sustainability contributes to satisfaction, its absence does not inherently result in dissatisfaction (Baier, Rausch, and Wagner 2020, Xu et al. 2009). Even though purchasing second-hand items is environmentally responsible, this is not the primary element motivating consumers to participate in this market (Cervellon et al. 2012, Guiot and Roux 2010, Kapusy and Lógó 2020, Wang et al. 2022, Yan et al. 2015).

Questioning what and why we consume can raise awareness about environmental impacts and foster a broader perspective on others beyond the products they consume (Brondino-Pompeo 2022). Given that the second-hand clothing market aligns with priority activities of CE—reduction and reuse (Garcia et al. 2021, Kirchherr et al. 2017), understanding what attracts consumers to this sector is essential for encouraging and expanding circular consumption over linear consumption in fashion.

Methodology

To understand what drives the second-hand clothing consumption, a qualitative approach was employed (Belk et al. 2013). Multiple sources of evidence were consulted through participant observation, in-depth interviews, and document analysis (Table 1).

Table 1

Data collection

Source	Characteristic	Quantity
Participant observation	Participation in exhibitions and webinar/symposium and visits to thrift stores	Participation in four events, totaling 6 hours, visits to 32 thrift stores and 37 pages of field diary
In-depth interviews	Interviews with thrift store consumers and entrepreneurs	11 interviews with a total duration of 8h and 40 min and 120 pages of transcription
Documents	Reports, interviews, whitepapers, news article	11 documents totaling 219 pages
Documents and online follow-up	Blogs, podcasts, Instagram posts, Vlogs, and documentaries.	16 environments monitored, totaling 67 pages of data collected and 7.5 hours of video monitoring.

Source: Research data (2024)

As part of the participant observation process, 17 thrift stores in Dublin (Ireland), three in Barcelona (Spain), two in Porto (Portugal), seven in São João del Rei (Brazil), and three in Belo Horizonte (Brazil) were visited. Additionally, exhibitions related to fashion and sustainability were attended in various countries. Despite the geographic diversity, the research did not aim to conduct a cross-cultural comparison. The inclusion of international sites visits was due to the researchers being based in different countries during the research period, as well as the opportunity to conduct observations during short trips.

The varied contexts served as complementary empirical references, aimed at expanding the understanding of display strategies, curatorial choices, aesthetics, and organizational structures within second-hand retail environments. Nevertheless, there was no intention of establishing direct comparisons between the countries visited.

These observations provided contextual depth to the study of second-hand clothing consumption and contributed to the interpretation of narratives shared by Brazilian participants,

who resided either in Brazil or Ireland. All visits were strictly observational, with no interviews conducted at these locations, and functioned as ethnographic support to the main body of the research—composed of interviews with Brazilian consumers.

The participant observation, with the goal was of immersing in the context, preparing for and validating the in-depth interviews, also included attendance at webinars and symposiums, as well as the analysis of documentaries. Insights were registered in a field diary maintained during 2022 and 2023.

The interviews followed a script refined iteratively using a hermeneutic approach (Thompson 1997), adapting it as relevant data emerged. They were conducted in person, via video calls, or, in one case, via WhatsApp audio messages at the interviewee's request.

Participants were selected through the snowball sampling technique (Costa, 2018), and a total of eleven individuals were interviewed (ten women and one man). The formulation and conduct of the interviews followed recommendations by Arsel (2017) and Belk et al. (2013). On average, the interviews lasted 47 minutes, being fully transcribed, what resulted in 120 pages of single-spaced text. Pseudonyms were employed to preserve the interviewees' anonymity. The interviews concluded upon empirical richness and data saturation achievement (Arsel 2017, Belk et al. 2013). Table 2 provides a characterization of the interviews.

Table 2

Characterization of the interviews

Name	Age	Relationship with thrift store	Date	Duration	Interview location
Rafael	30	Consumer and former owner	19/06/2022	35 min	Irish Emigration Museum - Dublin
Mary	64	Consumer	04/08/2022	49 min	Starbucks ILAC - Dublin
Teresa	33	Consumer	25/07/2022 to 30/07/2022	21 min	Via Whatsapp audio

Fernanda	29	Consumer	28/08/2022	30 min	Interviewee's residence
Amanda	49	Consumer and supporter of animal cause thrift stores	01/10/2022	31 min	Google Meet
Alice	34	Consumer	08/10/2022	43 min	University College Dublin
Laura	32	Consumer and owner.	22/08/2023	1 h	Google Meet
Sofia	33	Consumer	24/08/2023	38 min	Google Meet
Sara	36	Consumer	24/08/2023	45 min	Google Meet
Emily	35	Consumer and seller of upcycled crochet pieces.	25/08/2023	50 min	Google Meet
Isabela	35	Consumer and owner	16/09/2023	1h 58 min	Interviewee's thrift store

Source: Research data (2024)

In the document analysis (Table 3), the podcasts and videos' content were fully transcribed, while only relevant data from textual and visual documents were registered. This resulted in 454 pages of single-spaced text. The documents were selected through a purposive sampling strategy based on their relevance to the study's core themes: second-hand clothing consumption, ethical and sustainable fashion, and the circular economy. They included materials that provided empirical data, expert viewpoints, and public discourse representations. These documents were chosen for their analytical value in contextualizing participant narratives, enriching the understanding of market structures, and illuminating tensions and contradictions present in contemporary fashion consumption. Sources were identified through preliminary research, snowballing from references cited in key texts, and monitoring media and academic discussions relevant to the topic.

Table 3

Documentary research

Source	Kind	Theme
The True Cost	Documentary	Abuses of the fashion industry
I'm saving myself for when carnival comes	Documentary	Labor exploitation in the jeans industry
Circular economy in emerging markets: an insight from Brazil	Podcast	Circular Economy in Brazil
What are you to blame?	Podcast	Consumption in thrift stores
Is Ethical Consumption Possible?	Podcast	Ethical/sustainable consumption
Ethical consumption and fashion	Podcast	Ethical/sustainable consumption in fashion
Sustainability in Fashion (Dublin, 01/06/2023)	Exhibition	Sustainable fashion and thrift stores
Dressing the Body. Silhouettes and fashion (1550-2015) (Barcelona, 20/06/2022)	Exhibition	Fashion and female bodies
Product Lifetime Extension strategies in the textile sector	Webinar	Fashion industry abuses, research, and solutions for sustainable fashion
Circular Economy Symposium 2023 (10/18/2023)	Online Symposium	Circular Economy
Thredup Resale Report 2023	Whitepaper	Data on Used Clothing Consumption in the United States
Healthy and Sustainable Living 2022 - A global consumer insights study	Whitepaper	Data on healthy and sustainable consumption
Apparel and Footwear in Brazil - Euromonitor International	Whitepaper	Data on the Clothing and Footwear sector in Brazil

Rise of Resale Part 1: The Resale Shopper – Euromonitor International 2020	Whitepaper	Data on the sale and purchase of used products in the world and countries
Instagram @peçararab	Instagram	Means of dissemination and social network of the thrift store
Instagram @enjoei	Instagram	Means of dissemination and social network of the thrift store
Instagram @fash_rev_brasil	Instagram	Fashion Revolution Movement in Brazil
Instagram post @arlindogrund	Instagram	Tips for buying at thrift stores by stylist and presenter Arlindo Grund
Instagram @cansei_vendi	Instagram	Means of dissemination and social network of the luxury thrift store
Instagram @giovannanader	Instagram	Social network of presenter and activist Giovanna Nader
"Thrift stores are a way to hack the capitalist system," says Giovanna Nader (Exame Magazine)	Report	Thrift Store and Circular Fashion
Second-hand market: a billionaire sector that challenges the fashion industry as a solution or new problem (Curto News)	Report	Thrift store, circular fashion, sustainability and contradictions
The thrift store is the new fast fashion (Exame)	Report	Growth of thrift stores
Disposable clothing: new consumption pattern in the era of "ultra-fast fashion" (CNN Brasil)	Report	Impacts of the fashion industry and the growth of Fast Fashion

The Role of Experience Design in the Transition to Circular Fashion	News article	Importance of consumers on the path to circularity
Metal straws and thrift store clothes will not save the Amazon," says activist	Report	Impact of individual actions during increase in deforestation and fires in the Amazon rainforest
Adriane Galisteu on buying at thrift stores: 'Whoever doesn't learn about sustainable fashion, is out of fashion' (GQ Moda – Globo)	Interview	Interview in which Adriane Galisteu talks about her consumption in thrift stores
YouTube Channel Kalindy Rodrigues	VLOG	Thrift store management
YouTube Channel Marcela Carrasco	VLOG	Fashion Youtube Channel
YouTube Channel YouTube Channel Victória Zattoni	VLOG	Youtube channel about thrift stores
Thrift Store Black Friday: 5 Trends You Can Find Here (REPASSA)	BLOG	Trends found in the second-hand clothing chain.

Source: Research data (2024)

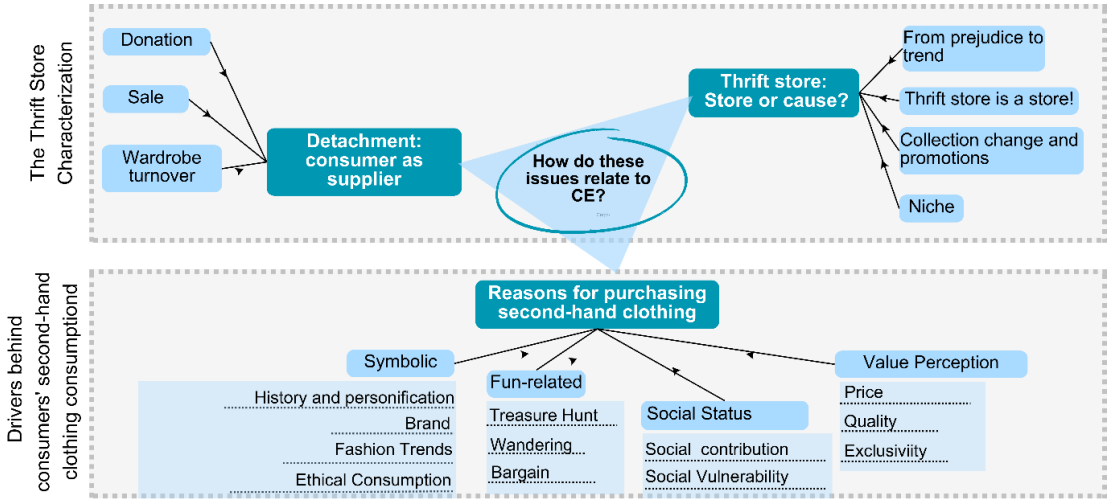
The data were read, grouped, and analysed using OneNote, employing comparative and analytical techniques to identify themes and specific characteristics related to the research question and literature. A hermeneutic approach (Thompson 1997) was used, involving continuous reading and re-reading. The initial analysis yielded 42 codes, which were discussed among the authors to jointly examine the material and uncover additional connections and perspectives. Subsequently, thematic categories (Belk et al. 2013) where grouped in a mental map.

Results and discussion

A mind map (Figure 2) was developed to group thematic categories (Belk et al. 2013). Firstly, we characterized thrift stores, and secondly, we identified the drivers behind consumers' second-hand clothing consumption.

Figure 2

Mind Map



Source: Research data (2024)

During the Thrift Store Characterization, it was perceived that consumers play a dual role in the sector - as both consumers and suppliers concomitantly. Additionally, thrift store models are increasingly mirroring traditional retail in their operation and presentation.

Regarding the drivers behind second-hand clothing consumption, we identified and analyzed the aspects influencing second-hand clothing purchases. Twelve drivers were identified and grouped into four categories: (i) symbolic, (ii) fun-related, (iii) social status, and (iv) value perception.

The Thrift Store Characterization

From prejudice to trend

Historically, purchasing second-hand clothing was associated with poverty and diseases (Leite 2021, Soares 2021). However, thrift stores have become increasingly popular and desirable (Felippe and Feil 2020, Lee and Moraes 2022, Pinto et al. 2021, Thredup 2022, Valor et al. 2022, Willersdorf et al. 2020). Interviewees shared that some family members resisted thrift stores, claiming that "clothes store energy" (Teresa's mother) or labelling them as "disgusting because others have worn them" (Emily's mother-in-law). These negative perceptions, linked to contamination, include spiritual concerns (Rulikova 2020, Vale, Maciel and Cavas 2016). Despite these stigmas, consumers confront prejudice to embrace second-hand shopping. Teresa shared her experience:

I bought a beautiful scarf! [...] My mother loved it! I said: "Oh mom, do you want it?" She said, 'wow, I loved it!' After she used it, I told her, "Mom, I bought it at a thrift store, five reais, incredible, isn't it (laughs)? (Teresa, personal communication, 25/07/2022 to 30/07/2022)

The cultural shift toward sustainability and ethical consumption has driven the acceptance of thrift stores (Euromonitor 2022, Thredup 2022, Willersdorf et al. 2020). They are no longer seen as spaces only for low-income individuals: "At some point, it became very profitable and ended up becoming even elitist, you know? (Teresa)".

For some, thrift stores offer an alternative to traditional markets, providing a sense of sovereignty (Guiot and Roux 2010):

There is a target of the store, right? The store wants to force you to like its items. In thrift stores, no. You look for what you want and like, what is fun or suits you the most, right? (Amanda, personal communication, 01/10/2022).

The acceptance of thrift stores has led to their diversification, with some adopting organized formats resembling traditional retail. Emily explained:

From my previous experiences in thrift stores, I had a bit of a grudge because they were... you know, like church thrift stores? The pants are one real, the blouse is two (laughs)... And that smell... I've never thought, "Oh, it's the person's energy", but the thrift stores I knew weren't charming. (Emily, personal communication, 25/08/2023).

According to Fillippe (2022), the growing demand has prompted thrift stores to reinvent themselves to cater to diverse audiences.

"Thrift store is a store!"

Thrift stores, once associated with affordability, now attract consumers for varied reasons, balancing paradoxical roles: (i) promoting charity or sustainability and (ii) replicating traditional consumption models.

Consumers expect thrift store to meet similar standards as other establishments: "setting up a thrift store is the same as setting up a new store. You must be meticulous and have aesthetics" (Mary). Some owners feel the need to assert their status as legitimate stores:

When I say I have a store and mention it sells used clothes, people say, "Oh, so you have a thrift store!" [...] No! I have a store! Because a thrift store is a store! (Laura, personal communication, 22/08/2023).

Thrift stores have also specialized to cater to niche audiences. Laura, for instance, rejects donations that do not align with her target market to avoid unnecessary inventory. Promotions and collection swaps attract customers, often leading to impulsive purchases. Thrift store consultant Kalindy Rodrigues highlights the urgency effect: "a promotion shows the customer that it's going to end and that they need to take advantage of it while there is time" (Rodrigues 2021).

Although thrift stores publicize the own style, fashion trends also play a role in thrift store marketing: “Fashion is cyclical [...] instead of buying fast fashion, let's go to the thrift store to find 2022 summer trends in cheap prices” (Carrasco 2021).

The possibility of finding new pieces in thrift stores adds to their appeal:

Sometimes stores donate to thrift stores! There is a thrift store I buy that comes with a lot of brand-new clothes from expensive stores! It's wonderful when there is something in my size (Amanda, personal communication, 01/10/2022).

All respondents seek quality items, often with a new appearance. Isabela notes that her thrift store surprises customers with well-preserved or even new pieces, leading some to ask, "Is it really a thrift store?" The rise of organized formats is evident. According to Sara, nowadays there is the "chic” or "boutique” thrift store where "not everyone can frequent”. Large chains are also entering this market, such as Renner’s acquisition of the used clothing startup Repassa (Fillippe 2022).

Sometimes, consumers seek thrift stores to increase their consume or have a turnover in their wardrobe: "Where you see a little door that you know is a thrift store, you enter and there is no way to leave without anything [...]. I always go out with a bag of clothes" (Laura). Emily even "bought a piece a day" until she asked herself "what am I doing?". Nátaly Neri, digital influencer talks about a possible consumerism in thrift stores:

Cheap clothes, incredible clothes [...] You start buying a lot! I had nowhere to put clothes. And to this day I have more clothes than I should have. [...] So consumerism is not about "oh, buy fast fashion clothes". You can be a thrift store consumerist! (Neri 2023 - the podcast "O tempo virou").

The low price, a common characteristic between thrift and fast fashion stores, can be a factor that encourages overbuying.

The consumer-supplier

The maintenance and expansion of thrift stores and the consumption of used clothing require consumers to act as both buyers and suppliers. As suppliers, consumers donate or sell their clothes to middlemen or directly (Gopalakrishnan and Matthews 2018). Fernanda verbalizes that "if she was not wearing something anymore, she should 'put it in a bag and give it to someone'. Maria says she learned to detach herself more easily from her clothes: "if I'm going to buy a new blouse, it doesn't matter if it's at the thrift store or anything else... Because it's new in my wardrobe, I release two!".

Isabela observes that individuals who donate clothes to her thrift store frequently purchase new clothing, utilizing donations to constantly renew their wardrobes: "They have a greater buying habit. People with a good financial condition [...] They have this greater periodicity of purchase. At least every two months they are buying".

Emily, found in the thrift store a way to make her wardrobe "circular". However, she ponders that "this turnover in the wardrobe is very much linked to fast fashion".

The thrift store is also an alternative to sell clothes bought by impulse, becoming an alternative to recover the money from the "wrong" purchase. Isabela exemplifies with the speech of a woman who tried to get rid of her clothes in her establishment:

She said: "I bought about fifty pieces at SHEIN, just a few fit and most of them I didn't like". [...] I said: "look, only SHEIN pieces, I don't get them" [...] Then I explained to her about the work analogous to slavery (Isabela, personal communication, 16/09/2023).

However, she ponders that after the pieces have already been produced, even if they are from fast fashion, it is better to give them a second chance to prevent the production of a new piece or an incorrect disposal.

Second-hand clothes consumption

Based on an understanding of the aspects that drive second-hand clothes consumption, we considered whether they promote a new form of consumption that could benefit a CE system or, conversely, replicate existing patterns within the capitalist and linear system. We analysed how these aspects contribute—or fail to contribute—to the transition toward CE, classifying their role as positive, neutral, or negative (Table 4):

- Positive: potentially beneficial for the development of CE.

- Neutral: may lead to the purchase of either new or second-hand clothing, as they resemble traditional consumption motives.
- Negative: easily co-opted by the linear model, reinforcing the status quo.

Table 4

Role of the consumption aspects to CE

Groups	Aspects	CE role
Symbolic	History and Personification	Positive
	Brand	Neutral
	Trend	Neutral
	Ethical consumption	Positive
Fun-related	Treasure Hunt	Positive
	Wandering	Neutral
	Bargaining	Neutral
Social status	Social Contribution	Positive
	Social Vulnerability	Neutral
Value Perception	Price	Negative
	Quality	Neutral
	Exclusivity	Positive

Source: Research data (2024)

The data indicate that the choice of thrift shopping generally stems from a combination of these intertwined aspects. However, for analytical purposes, we examined them individually.

Symbolic elements

Symbolic elements are associated with meanings such as ideologies or individual and social identity (Ravasi and Rindova 2013). These include: (i) the history and personalization of the item, (ii) brand, (iii) fashion trends, and (iv) ethical consumption.

History and personalization of the item

The consumption of second-hand clothing can be driven by a nostalgic imagination or idealization of the past (Cervellon et al. 2012). Two interviewees exhibited this behaviour, which we termed "history and personalization of the item." Emily remarked: "Someone has already worn [the item], someone must have been very happy—or not." Consumers described these items as almost alive, due to the history and journey they embody. Emily stated: "The thrift store piece travelled through many places and ended up here! And I found it! Because it was meant for me, and I was meant for it!" Similarly, Maria personified the items, believing they have their own desires and "want to be in the hands of someone who loves them [the items] as much as [the items love the person]." Maria felt that items carry energy and should reciprocally wish to be acquired by a buyer who desires them.

The history and personalization of items positively contribute to CE by fostering attachment and identification with the item's story, which likely discourages fleeting consumption. Additionally, this characteristic is exclusive to thrift shopping and challenging to reproduce in the new clothing market. Associating the item with a story, whether personal or external, stimulates imagination and identity, challenging the fast-fashion industry that dictates what should or should not be worn.

Consumers often donate clothing to make space for new items (Ha-Brookshire and Hodges 2009). A stronger emotional attachment to clothing, as described by the concept of self-extension (Belk 1988), makes these items more difficult to discard in favor of short-lived consumption trends. However, this same attachment may also impede the redistribution of unused clothing to new owners.

Brand

The pursuit of well-known brands, common in the new clothing market, also occurs in thrift stores, though driven by affordability or a sense of opportunity. While interviewees often claimed not to care about brands, they expressed excitement upon finding branded items at low prices. Emily shared how she acquired a Ralph Lauren pair of pants during an Instagram live sale:

She [the seller] said: 'Ralph Lauren pants, barely worn...' I said: 'This is mine!' [...] It's not that I look for brands. I look for tailoring and so on. Today, it's a way I can access this quality at a more affordable price." Emily also mentioned buying pants that were a smaller size than hers: "I found a pair of pants that would cost around a thousand reais today. I paid fifty reais! [...] The

only downside is: I need to lose at least five kilos [laughs]! (Emily, personal communication, 25/08/2023).

Price was cited as an advantage when associated with a reputable brand. However, consumers rejected high-priced branded items in thrift stores, even if the brand was desirable. Maria stated: "I won't pay for the brand just because it's a brand, whether it's in a thrift store or not." She argued that branded items in thrift stores should not be more expensive than similar-quality new items, even if the latter lack a recognizable brand.

Brands in thrift stores play a relative role in CE, as they can also be found in new clothing stores. Consumers might shift back to purchasing new clothing if their financial situation improves or if these brands become more accessible through promotions or policy changes.

Thrift stores specialized in branded or imported items have helped to reduce the stigma around thrift shopping in Brazil by associating "paradoxical elements such as luxury and thrift" (Zampier, Farias, and Pinto 2023). However, the symbolic desire associated with brands mirrors the pursuit of power and status through consumption in capitalist society. Thus, while branded items in thrift stores help reduce stigma, they also reinforce the symbolism tied to these brands. Impulse purchases driven by thrift store opportunities, such as buying clothing that does not fit, contradict the principles of CE.

Fashion trends

While thrift shopping was once stigmatized, it is now seen as trendy (Exame 2022; SDA 2023). Rafael noted that his mother had been shopping at thrift stores "before it was fashionable," and Sara commented that thrift shopping "is like a wave that people follow." She believed most thrift shoppers are not seeking new forms of consumption but rather following a trend.

Laura, who previously hesitated to disclose the origin of her clothing, recently overcame her reservations: "Years ago, I started thrifting. But I wouldn't talk about it [...] because I was [...] ashamed [...]. When I learned more about thrift shopping, I thought: 'Wow, I was so silly!'" Increased visibility of thrift shopping in traditional media and social networks likely contributed to its destigmatization. A mix of factors—such as the pursuit of exclusivity, environmental awareness, extra income opportunities, and fashion reinterpretations—has strengthened the

sector. There is also a growing trend toward vintage in luxury brands and potential changes in consumption habits:

Promoting a fashion market with less environmental impact is a trend [...]. But fashion is cyclical, and this is not the first time vintage has entered the mainstream. What seems different this time is that the wave of second-hand clothing is based on changes in consumption habits. Consuming less, favouring artisan chains, dressing authentically, and embracing second-hand clothing are now priorities for fashion enthusiasts (Fillipe 2022).

However, consumption driven by trends, while attracting new customers, does not guarantee their loyalty. Kapusy and Lógó 2020 suggest promoting thrift shopping as trendy to encourage it, but this approach does not foster deeper reflection on consumption patterns and instead reinforces them. Vintage fashion in thrift stores can easily be co-opted by the industry, as seen with reinterpretations. Nevertheless, some consumers initially drawn by trends may develop new perspectives, as thrift stores themselves advocate for ethical consumption. Interviewees like Laura and Teresa demonstrated increased awareness about the impacts of consumption after frequenting thrift stores.

Thus, fashion trends play a relative role in CE, as they can attract and retain new consumers but may also be temporary or encourage vintage consumption without reducing new clothing purchases. Increased acceptance of thrift shopping does not necessarily indicate mainstream adoption or reduced new clothing consumption but may instead represent an additional form of consumption.

Ethical consumption

Shopping at thrift stores can be driven by political, sustainable, or conscious motivations, a concept we defined as ethical consumption. In this context, environmental concerns were the most frequently cited. However, some authors suggest that sustainability is a secondary factor in this type of purchase (Cervellon et al. 2012, Yan et al. 2015). During interviews, some consumers prioritized thrift stores for sustainability reasons, while others viewed it as an additional benefit. For example, Amanda states: "Thrift stores help us avoid mass consumption [...], to reuse, and this is a way to help save resources. [...] There's no reason to buy something new when there's something used that already exists." On the other hand, Laura, who initially shopped at thrift

stores for other reasons, says she has gradually learned about sustainability: "At first, I didn't really understand what sustainable fashion was."

Alice mentions the issue of overproduction but places sustainability as a secondary concern: "It alternates between a good price, clothing that still has quality, and also a sustainability factor." Rafael, while stating that his primary reason for shopping at thrift stores is price, defends this alternative as a "political act" and believes thrift stores offer "fairer labour relations":

The more people realize this, the more they'll question: why buy from this place? What's the outcome of this purchase? But it's very hard to fight against invasive advertising running 24 hours per day. The very low prices [...]. It's hard to resist and make conscious choices when we're bombarded with stimuli to not think. (Rafael, personal communication, 19/06/2022).

Even those who shop consciously at thrift stores consider individual actions insufficient. Isabela says: "Responsibility is shared. It doesn't help if I, Isabela, do my part while the government and companies don't do theirs." Sara also reflects:

Behavioural change in part of the population won't solve a structural issue. [...] It's about rethinking a society entirely based on the exchange and sale of goods. How could we live differently? That's the hardest part [...]. Being vegetarian, vegan [...] or shopping at thrift stores to avoid feeding large fashion companies, I don't know. I think these are interesting ideas, but they won't stop, right? The planet's destruction... (Sara, personal communication, 24/08/2023).

Similarly, activists share these views. Sandra Guimarães, a human and animal rights activist, stated in a report (Marques et al. 2019): "Individual actions serve as anaesthesia and benefit capitalism, whose interest is to relieve the guilt of the true culprits and place it on individuals." Still, the activist argues: "Even though individual actions are not very effective, that's no reason not to act. Waste is never justified in any context."

Ethical consumption is tied to a consumer's desire for change, whether in personal habits or structural reform. This deeper reasoning can build customer loyalty and benefit the CE. According to Oliveira, Miranda and Dias (2022), social, lifestyle, reuse, awareness, and transgressive arguments reveal thrift stores as more than spaces for old clothes. Similarly, Lourenço and Moraes 2022 argue that thrift stores align with ideals of ethical consumption, slow fashion, reduced waste, preservation of natural resources, and resistance to consumerism. However, if the symbolic and functional benefits of buying overshadow environmental concerns

(Santamaria et al. 2016), consumers who are not engaged in this factor can easily be swayed by green marketing or sustainable consumerism (Akenji 2014). Some interviewees indicated that shopping for a cause is not the main reason they visit thrift stores. Likewise, authors such as Gopalakrishnan and Matthews (2018), Kapusy and Lógó (2020), and Wang et al. (2022) did not find this reason to be dominant in thrift store purchases. Thus, consumers who do not prioritize this factor may be attracted by lower prices and industry innovations. Moreover, the incorporation of countercultural movements into consumer capitalism may hinder structural change (Fontenelle 2017).

Fun-related factors

Fun factors were attributed to recreation and entertainment characteristics. These were categorized as treasure hunting, wandering, and bargaining.

Treasure Hunting

The data emphasizing the concept of treasure hunting illustrate how consumers perceive the act of discovering a beautiful, high-quality item that aligns with their style and size as both a "discovery" and a demonstration of skill or personal achievement.: "My friends sometimes say, 'Wow, you find so many things I don't notice.' Because it's about having a calmer eye," says Sofia. For her, the experience of "discovery" can become "a bit addictive", describing it as "a game where you have to go and hunt." Similarly, Emily is drawn to the challenge:

The fun part of thrift stores isn't walking in and immediately finding what you want [...]; it's sifting through. It's finding a piece and saying, 'Wow! I found it!' [...] In a fancy concept store, full of branded 'frills,' you'll find plenty of wonderful pieces. It's too easy! [...] The fun of thrift stores is... You know Cinderella's slipper? The thrill of thrift shopping is finding the treasure, the slipper that fits your foot! (Emily, personal communication, 25/08/2023).

Amanda clarifies that while she sometimes finds things she genuinely needs at thrift stores, these are places for fun, and priorities are purchased at new product stores for practicality: "When I need something very specific, I go straight to the store where I know it's available [...]. In thrift stores, I buy random things [...] not on my priority list." Since thrift shopping requires more time and effort, treasure hunting is not prioritized in cases of urgency or need, making thrift stores spaces for recreation and discovery.

Discovery aspects are hard to replicate in new clothing stores, as treasure hunting is inherent to thrift stores (Kapusy and Lógó 2020, Valor et al. 2022, Wang et al. 2022) and contrasts with the standardization of fast fashion. This could be a positive aspect for the CE since this motivation, even if not sustainability-focused, encourages consumer preference for used items. According to Wang et al. (2022), Valor et al. (2022), and Kapusy and Lógó (2020), promoting second-hand clothing through the treasure-hunting narrative is advantageous for thrift stores, outweighing responsible consumption concerns. Wang et al. (2022) found that purchasing used items is not significantly motivated by price or sustainability but by fun and treasure hunting.

Wandering

The term wandering was used to describe unplanned visits to thrift stores. According to Alice, entering a thrift store often happens by chance when she coincidentally passes by: "Going to a thrift store is more about passing by than saying, 'Oh, I'll check for a coat there first.'" Wandering has a dual meaning: stumbling upon a thrift store during a walk or entering a thrift store for leisure: "Sometimes I go looking for something I hadn't even thought of, you know? I go in to see what people are offering that I can use, that I need, and that suits me," says Maria.

While Maria mentions buying what she needs, she also notes going "in search of something she hadn't considered." Similarly, Rafael says he usually visits thrift stores with something in mind that he "needs," but when he finds an "interesting" store that piques his curiosity, he goes in to discover "what he didn't realize he needed."

Wandering was classified as relative to the CE because this pattern is common to all types of consumption. If a thrift store is on someone's route, it may encourage purchasing used items over new ones. However, if consumers "wander" into thrift stores "if they're on the way," the same could happen with new product stores. Furthermore, thrift store visits are not driven by specific needs or necessities. This represents occasional consumption, which may contradict the CE's priority of reduction (Kirchherr, Reike and Hekkert 2017). Additionally, occasional consumption may be linked to green consumerism (Akenji 2014) or serve as a "green card" for consumption (Garcia et al. 2021). On the other hand, a higher number of thrift stores could encourage the growth of second-hand clothing consumption over new items, as shopping for leisure or exploration could create more opportunities for this sector. For example, some

interviewees reported consuming more at thrift stores after moving to Ireland, where there are more second-hand shops.

Bargaining

The bargaining factor was associated with exchanges and bargaining. Emily, for instance, would gather items from herself and her family to secure discounts at thrift stores:

I'd take things from my family: 'Mom, don't you have a blouse or something?' (laughs). I'd collect them! [...] If I gather ten items, I can get them for a hundred or a hundred and twenty reais! And the items aren't expensive. So I can, for example, get pants, a blouse, a pair of shoes... (Emily, personal communication, 25/08/2023).

Although exchanging many items for one may not seem advantageous, the exchange is meaningful because several unused items are traded for desired pieces.

Bargaining was classified as having a relative role in the CE, as it can also occur in new clothing markets. Moreover, Amanda, a buyer at charity thrift shops, argued that "thrift stores are not places for bargaining but for supporting a social cause." Two entrepreneurs, Laura and Isabela, also expressed discomfort when customers question their prices, arguing that thrift stores are shops like any other. Bargaining is not an exclusivity of thrift stores, nor is it acceptable in all of them.

Social Position Aspects

The social position group encompassed reasons for purchasing and donating related to social status, revealing the varying roles of consumers depending on their material resources. Data were categorized into social contribution and social vulnerability.

Before becoming commercially popular, thrift stores were mostly charitable, organized by philanthropic organizations. Charitable thrift stores primarily involve selling donated clothing, either from individuals looking to discard their garments (Ha-Brookshire and Hodges 2009) or from those wishing to support a cause. These stores typically rely on volunteer labour and

donations, offering items at more accessible prices. This dual-purpose model benefits both fundraising for institutions and democratizing clothing access for vulnerable groups.

Social Contribution

Social contribution is closely tied to charitable thrift stores and donations. Field observations in Europe (Ireland, Portugal, and Spain) revealed that charity thrift shops are better organized and conduct more thorough sorting of items, enabling higher sales value. In Brazil, however, such places are generally disorganized and sell items at minimal prices, allowing for-profit thrift stores to select and purchase items for resale.

Amanda, a customer of charitable thrift stores, remarks, "I don't haggle at thrift stores [...] you're buying to help." While she finds the concept of reuse appealing and supports environmental causes, she sees no sense in purchasing from for-profit thrift stores, citing high prices and the profit motive. Similarly, Fernanda states that beyond financial considerations, she shops at thrift stores to support social causes. She acknowledges that for-profit thrift stores can also support small entrepreneurs and believes in the value of "clothing recycling".

Donations are another form of contribution. Teresa believes that by donating, she makes quality clothing accessible to a broader audience:

As I learned more about consumption through thrift stores, I became less attached [...] I used to think that donations were only for items in terrible condition or that I would never use again, which is a very elitist mindset. Now I see that clothes can have a longer lifespan, and the more people can have good things, the better. (Teresa, personal communication, 25/07/2022 to 30/07/2022).

The concept of extending a garment's "useful life" can sometimes mask a desire to update one's wardrobe while alleviating guilt through charity. According to Leite 2021, the early 20th-century São Paulo elite donated clothing under the guise of charity, aiming to adopt new trends.

Social Vulnerability

On the other hand, some people frequent thrift stores because it is their only or most viable option to dress as they wish, highlighting the role of social vulnerability. While fast fashion democratized fashion with lower-quality materials and craftsmanship, thrift stores provide an avenue for acquiring longer-lasting clothing. For instance, Laura mentions being able to create an

entire outfit for “ten reais” because she cannot afford new store prices. Similarly, Sara notes that during college, thrift stores served both her practical needs and preferences: “I needed a warm sweater, and it wasn’t just about liking it; it was also a necessity.”

Thrift stores are appealing to low-income individuals or those who wish to save money. Both social position factors (social contribution and social vulnerability) were considered to have a relative role in EC (ethical consumption). Social contribution can be masked as a charitable act while actually aiming to enable wardrobe rotation. According to (Farahani et al. 2022), as consumers acquire more fast fashion items, their disposal—whether through donation or resale—increases. Similarly, Yoon, Lee, and Choo (2020) state that purchasing new styles encourages the disposal of items deemed outdated. The loss of connection with clothing and subsequent donation can occur simply due to fashion trends. In such cases, consumers seeking to stay updated on trends may not opt for thrift store items, viewing them as outdated.

Thus, when donating their clothes, consumers do not necessarily replace them with second-hand items. Ha-Brookshire and Hodges (2009) found the primary motivation for donation was the need to create space for new items, with disposal directly linked to acquisition. According to some interviewees, donation also results from annual wardrobe reviews. Similarly, Ha-Brookshire and Hodges (2009) found that donation serves as a means to alleviate guilt for discarding clothes and to free up space for new ones.

Moreover, thrift store items originating from fast fashion brands may not be well-received due to similar pricing to new items or their already worn appearance. In such cases, purchasing from thrift stores due to social vulnerability might be replaced by purchasing fast fashion products. Fast fashion stores cater to a lower-income population and provide access to trends more efficiently than thrift stores can.

According to Oliveira, Miranda and Dias (2022), despite the movement toward buying used clothing, the fast fashion industry has never been stronger. Their study indicates that both second-hand clothing and fast fashion are gaining traction among Generation Z. This trend may suggest an overall increase in consumerism rather than a substitution of new clothing purchases with second-hand items.

Value Perception Aspects

Zauner, Koller, and Hatak (2015) define perceived customer value as a subjective concept that includes comparisons with other market offerings and a sense of benefit. We consider the following as value perception factors: price, quality, and exclusivity.

Price

Unlike the issue of social vulnerability, some people turn to thrift stores aiming to save money, even when it is not a necessity. In these cases, the focus is on price. Rafael, who emphasized the socio-environmental role of thrift stores during his interview, expressed: "To be honest, the main reason [I shop at thrift stores] is the price. When I go to very expensive thrift stores, it puts me off a bit." Maria questions: "Why do I have to buy something new and pay a fortune? [...] No one knows if you were the first owner or not. What's the difference?" She states that she "values the money she earns" and considers insisting on being the first owner as "vanity."

Beyond saving money, there is a certain pride in finding a bargain and even a sense of defiance in revealing that an item came from a thrift store. Sara, who initially started shopping at thrift stores due to social vulnerability and now has a better financial situation, when asked if she hesitates to admit she wears thrifted clothes, responds: "It's the opposite! I love saying I paid five reais!" There are also cases where consumers simultaneously shop at thrift stores and fast fashion outlets. In a YouTube video, Zattoni (2022), a digital influencer, shares tips on "how to create trendy looks with thrift store items for two reais", demonstrating that her primary reason for shopping at and promoting thrift stores is price.

All the pieces [...] are thrifted. Some little accessories that aren't thrifted, I mentioned to you. Some are from Shopee, but [...] very cheap. So, today's video is about items costing up to ten or fifteen reais (Zattoni 2022).

Finding good deals was mentioned by all interviewees, and for most, it was cited as the main driver for shopping. According to Gopalakrishnan and Matthews (2018) and Xu et al. (2014), low prices and finding good deals are the primary motivators for thrift store shopping. Price was noted by 71% of respondents in the study by Kapusy and Lógó (2020).

Seeking thrift stores solely for their low prices complicates their operation, as they may struggle to compete with the pricing of the fast fashion industry. For this reason, the role of price in the circular economy was rated negatively. The costs of maintenance, curation, and recovery often cannot compete with fast fashion stores or meet the expectations of extremely low prices

created by the charitable thrift store model. Additionally, very low prices can lead to "thrift store consumerism," which, while less harmful than consuming new products, does not break away from the culture of consumption. Interviewees made remarks like "leaving with a bag full of clothes" (Laura) and "I got absurdly addicted [to buying at thrift stores]" (Emily).

On the other hand, raising prices in thrift stores could exclude lower-income social groups or deter people who already expect used clothing to be cheaper. In any case, low prices, while not the only factor, seem to be the primary reason most consumers buy second-hand clothing. Thus, the cost-benefit aspect, combined with other factors such as sustainability and the thrill of treasure hunting (which fast fashion does not yet address), could potentially transform consumer purchasing behaviour.

Quality

According to some interviewees, thrift store clothing tends to be of higher quality because it is older. However, clothes are increasingly made available for reuse at a faster pace, making it common to find current styles in thrift stores. Some interviewees mentioned finding items that are still new, with tags attached. Emily stated that thrift shopping "is a way to get quality at a more affordable price, transforming your wardrobe into circular fashion." Teresa noted that one of the reasons she buys used clothing is its "durability." Alice added that she alternates between "a good price, clothing that still has quality, and a sustainability aspect." However, she reflected: "Is it worth paying for a used piece? [...] There was a time when I bought a used item, wore it a little, and then it tore." After that experience, she became "more attentive to how much a piece is worth."

It is due to concerns like these that entrepreneurs Laura and Isabela prioritize the quality of the clothing they sell, conducting meticulous selection processes. Isabela rates the items she sells on a scale from zero to ten. A piece rated 10/10 is in perfect condition, while items rated below eight are excluded from sale. Similarly, Laura rejects some donated items to protect the reputation of her thrift store:

Even if I price the pieces at five reais [...]. Sometimes those five reais the customer paid, after two or three washes, it would fall apart. I'm very cautious about selling an item, whether it's five or ten reais, and having it fall apart after a few days. That's five or ten reais someone

spent, and then they'll go around saying, 'Wow, I bought it there, and it fell apart!'. (Laura, personal communication, 22/08/2023).

Maria argued that for a thrift store to be appealing, defects should not be hidden, and defective items should not be sold: "What has defects, you give to charity." She also claimed that thrift stores offer better quality clothing than stores that mass-produce and sell in bulk. According to her, finding new, high-quality clothing "will end up being more expensive." Therefore, she seeks quality at an accessible price in thrift stores.

According to Cervellon et al. (2012), among second-hand consumers, there are those who seek vintage pieces and those who look for items that align with current fashion trends. In wealthy countries, charity shops prefer to sell high-quality clothing because they fetch higher resale values (Farahani et al. 2022). However, the selection of such clothing is hampered by the large volume of discarded fast fashion items, which are lower quality and often redirected to countries in the Global South (Farahani et al. 2022, Hansem 2000, Fonteles et al. 2022). Thus, it is not guaranteed that thrift stores will always have better-quality or more durable clothing available. Camacho-Otero et al. (2018) argue that risks and uncertainties associated with circular solutions, such as used products, influence consumer perceptions and willingness to pay for them.

Increasingly, the fast fashion industry offers clothing with good quality at low prices, reducing the stigma that low prices equate to poor quality. Additionally, there is still a perception that thrift stores are places for old clothing (Felippe and Feil 2020, Rulikova 2020). For this reason, seeking quality is not a factor that sustains the consumption of used clothing. As with price and social vulnerability factors, consumers could easily shift shopping preferences if their financial situation improves or if the industry continues to enhance clothing quality while maintaining low prices. Therefore, the role of quality in the circular economy is relative.

One way to retain thrift store consumers despite improvements in the quality and affordability of fast fashion would be to emphasize ethical consumption. In the fashion industry, it is challenging to maintain low prices and high quality while adhering to sustainable practices and valuing labor. Additionally, according to Wang et al. (2022), advancing post-sale services that benefit consumers could strengthen thrift store shopping.

Exclusivity

The ability to find a unique piece makes consumers feel special, whether due to their good taste, their "treasure-hunting" skills, or their sense of cleverness. This is referred to here as the exclusivity factor. Sofia explains:

You create your own experience, and it's so gratifying when you find something that really resonates with you [...]. It's something kind of exclusive, right? At a good price. [...] A store with ready-made racks doesn't give you that. And it's easier to find people wearing the same piece there, but not at a thrift store. (Sofia, personal communication, 22/08/2023)

When Sara needs basic clothing, she usually turns to new product stores, but at thrift stores, she looks for something special: "Sometimes I find something really special [...] that you don't see nowadays. I've found very seventies-style vests, very hippie, which are not so easy to come by." Laura shares that she enjoys being different:

I've always liked high-waisted pants; I've never been one to follow trends... I go out, and I don't like seeing anyone dressed like me. Regular stores are all very much the same [...]. I found different things at thrift stores, things no one else will have because there's always just one piece. (Laura, personal communication, 24/08/2023).

The exclusivity factor contributes positively to the CE because it is an inherent characteristic of thrift stores and provides significant differentiation from fast fashion products. While both compete on price, the fast fashion industry, due to mass production, offers a large quantity of identical clothing, whereas exclusive new pieces are often expensive. Most people cannot afford such items. Consequently, even though consumers seeking exclusivity may not prioritize the CE, the likelihood of them remaining within this model is higher. Accordingly, Kapusy and Lógó (2020); Valor et al. (2022) and Wang et al. (2022) argue that promoting the exclusivity aspect can attract and retain consumers.

Conclusion

This study employed a qualitative approach, incorporating visits to thrift stores in Europe and Brazil, eleven interviews with Brazilian consumers (living in Brazil and Ireland) and thrift store entrepreneurs, and document analysis. It aimed to understand the factors that lead to the consumption of second-hand clothes and their role in the CE. The findings highlight that thrift stores increasingly mirror traditional retail models in their operation and presentation. Also, we

identified twelve factors that drive the consumption of second-hand clothes, grouped into four categories. Each factor was classified as positive, neutral, or negative for the process of transitioning to a CE.

We concluded that thrift stores play a significant role in supporting the principles of the CE, especially due to their strong association with reuse—one of the most essential activities within this approach (Kirchherr et al. 2017). However, their potential to advance sustainability may be compromised if they merely reinforce existing consumption habits without challenging society's unsustainable consumption patterns. This creates the risk of a rebound effect, where thrift stores inadvertently sustain the fast fashion supply chain, enhance its image, and shift attention away from the need to reduce overall consumption.

In this context, a macromarketing perspective proves vital, as it enables a broader understanding of systemic consumption issues and highlights the limitations of solutions based solely on individual behavior. Sustainable consumption is inherently a political and societal project that requires engagement from multiple perspectives and sectors. Although reuse is an important part of the solution, the underlying issue of excessive consumption must be addressed through lifestyle changes and a reduction in overall purchasing.

This research also contributes to the macromarketing discipline by emphasizing the importance of recognizing symbolic consumption in the context of second-hand clothing, where symbolic meanings tied to environmental behavior, inclusion, and social comparison are explored. The purchase of second-hand clothes—whether for fashion, style, or affordability—can represent a way for low-income consumers to gain social inclusion, rather than face exclusion. These symbolic dimensions are crucial for understanding how sustainable practices are adopted and represented in everyday life

This study aligns with previous research showing that sustainability is not the primary driver of second-hand clothing purchases. It builds upon existing studies on second-hand clothing consumption (e.g., Camacho-Otero et al. 2020, Felippe and Feil 2020, Ha-Brookshire and Hodges 2009, Kapusy and Lógó 2020, Lehner et al. 2020, Wang et al. 2022) and the CE (e.g., Alcalde-Calonge et al. 2022, Garcia et al. 2021, Ghisellini et al. 2016, Kirchherr et al. 2017, Maitre-Ekern and Dalhammar 2019, Muranko et al. 2018). Additionally, this work sheds light on underexplored areas within CE, such as reuse practices and Brazilian consumers' perspectives on second-hand purchases (Garcia et al. 2021, Kirchherr, Reike and Hekkert 2017, Magalhães et al. 2021).

Future research could further investigate the aspects behind consumers' disengagement from clothing and examine how the fashion industry shapes these behaviors. Additionally, studies could explore movements focused on reduction and consumers who actively avoid unnecessary purchases, providing critical insights for developing more effective CE strategies. Investigating the final destination and volume of unsellable garments, as well as assessing clothing rental as a sustainable alternative, could also offer valuable perspectives on circular fashion.

Moreover, future studies should delve deeper into the alignment between the CE, symbolic consumption, and second-hand clothing practices. Understanding how symbolic meanings interact with sustainable behaviors can enhance the development of strategies that are not only environmentally effective but also socially and culturally resonant.

References

Acosta, Alberto (2019). Living well: an opportunity to imagine other worlds. São Paulo: Editora Elefante.

Akenji, Lewis (2014). "Consumer scapegoatism and limits to green consumerism", Journal of Cleaner Production, 63(1), 13-23.

Alcalde-Calonge Alberto, Sáez-Martínez Francisco J. and Ruiz-Palomino, P. (2022). "Evolution of research on circular economy and related trends and topics. A thirteen-year review", Ecological Informatics, 70 (1), 101-716.

Arsel, Zeynep (2017), "Asking Questions with Reflexive Focus: A Tutorial on Designing and Conducting Interviews," Journal of Consumer Research, 44(4), 939–48.

Baier, D., T.M. Rausch, and T.F. Wagner (2020), "The Drivers of Sustainable Apparel and Sportswear Consumption: A Segmented Kano Perspective", Sustainability, 12(7).

Barbosa, Livia (2004). Consumer Society. Editora Schwarcz-Companhia das Letras.

Belk, Russell W. (1988), "Possessions and the Extended Self," Journal of Consumer Research, 15(2), 139–68.

Belk, Russel, Fischer, Eilen and Kozinets, Robert V. (2013), Qualitative Consumer & Marketing Research, SAGE.

Benson, April Lane (2000), I Shop, Therefore I Am: Compulsive Buying and the Search for Self, Jason Aronson.

Brondino-Pompeo, Karin (2022), "Are we what we consume or do we consume what we are? Processes of extension and expansion of the self", in Cultural Aspects of Consumption, Brondino-Pompeo, Karin, Morais, Isabela C. and Abdalla, Carlas C. São Paulo: Pimenta Cultural, 19–34.

Camacho-Otero, J., Pettersen, I. N. and Boks, C. (2020), "Consumer Engagement in the Circular Economy: Exploring Clothes Swapping in Emerging Economies from a Social Practice Perspective", Sustainable Development, 28(1), 279–93.

Camacho-Otero, Juana, Boks, C. and Pettersen, Ida N. (2018), "Consumption in the Circular Economy: A Literature Review", Switzerland: Sustainability, 10(8).

Carrança, Thais (2020), "I worked 16 hours a day to survive sewing masks': the story of a Bolivian immigrant during the pandemic", BBC News Brasil, https://www.bbc.com/portuguese/brasil-55167058.

Cervellon, Marie Cécile, Carey, Lindsey and Harms, Trine (2012), "Something Old, Something Used: Determinants of Women's Purchase of Vintage Fashion vs Second-Hand Fashion", International Journal of Retail and Distribution Management, 40(12), 956–74.

Connell, Kim (2019), "Utilizing Political Consumerism to Challenge the 21st Century Fast Fashion Industry", in The Oxford Handbook of Political Consumerism, Oxford University Press, 293–312.

DeQuero-Navarro, Beatriz, et al., (2020), "From Conflict to Cooperation: A Macromarketing View of Sustainable and Inclusive Development in Lebanon and the Middle East," Environmental Management, 66(2), 232–47.

Ekström, Karin M., and Salomonson Nicklas (2014), "Reuse and Recycling of Clothing and Textiles—A Network Approach", Journal of Macromarketing, 34(3), 383–99.

Ellen MacArthur Foundation (2013), Towards the Circular Economy: Economic and Business Rationale for an Accelerated Transition, research report.

Ellen MacArthur Foundation (2019), Fashion and the Circular Economy, research report.

Environmental Audit Committee (2019), Fixing Fashion: Clothing Consumption and Sustainability, research report.

EUROMONITOR (2020), "Passport. Rise of Resale Part 1: The Resale Shopper," market report.

EUROMONITOR (2022), "What Are the 10 Global Consumer Trends in 2022?" market report.

Farahani, Reza Zanjirani, Asgari, Nasrin and Wassenhove Luk N. Van (2022), "Fast Fashion, Charities, and the Circular Economy: Challenges for Operations Management", Production and Operations Management, 31(3), 1089–1114.

Felippe, Alessandro M. and Feil, Gabriel (2020), "Thrift Store: From Consumption of Old Clothes to Emerging Fashion Consumption", Projetica, 11(1), 295.

Fonteles, Mila, et al. (2022), "Environmental Impacts of Fast Fashion: The Atacama International Textile Dump-Chile", Revista Tecnologia e Sociedade, 18(53), 129-140.

Fontenelle, I. A. (2017), Cultura do consumo: fundamentos e formas contemporâneas, Editora FGV.

Garcia, Dimitris Georgantzis, et al. (2021), "Consumption in the Circular Economy: Learning from Our Mistakes", Sustainability (Switzerland), 13(2), 1–23.

Ghisellini, Patrizia, Cialani, Catia and Ulgiati Sergio (2016), "A Review on Circular Economy: The Expected Transition to a Balanced Interplay of Environmental and Economic Systems", Journal of Cleaner Production, 114(2), 11–32.

Global Warming Focus (2019), "Planetary Boundaries: Interactions in the Earth System Amplify Human Impacts", research report.

Gopalakrishnan, Sivasankari, and Matthews, Delisia (2018), "Collaborative Consumption: A Business Model Analysis of Second-Hand Fashion", Journal of Fashion Marketing and Management, 22(3), 354–68.

Guiot, Denis, and Roux Dominique (2010), "A Second-Hand Shoppers' Motivation Scale: Antecedents, Consequences, and Implications for Retailers", Journal of Retailing, 86(4), 355–71.

Ha-Brookshire, Jung E., and Hodges Nancy N. (2009), "Socially Responsible Consumer Behavior: Exploring Used Clothing Donation Behavior", Clothing and Textiles Research Journal, 27(3), 179–96.

Hamilton, Clive (2010), "Consumerism, Self-Creation and Prospects for a New Ecological Consciousness", Journal of Cleaner Production, 18(6), 571–75.

Kapusy, Kata, and Lógó Emma (2020), "The Extended Shopping Experience of Used Clothes in Hungary", Periodica Polytechnica Social and Management Sciences, 28(2), 140–45.

Kasser, Tim et al. (2014), "Changes in Materialism, Changes in Psychological Well-Being: Evidence from Three Longitudinal Studies and an Intervention Experiment", Motivation and Emotion, 38(1), 1–22.

Kemper, Joya A., Moscato, Emily M., and Kennedy Ann M. (2022), "Hacking the Marketing Education System: Using Macromarketing and the Circular Economy to Make a Better World", Journal of Marketing Education.

Kirchherr, Julian, Denise Reike, and Marko Hekkert (2017), "Conceptualizing the Circular Economy: An Analysis of 114 Definitions," Resources, Conservation and Recycling, 127(4), 221–32.

Lakatos, E. S. et al. (2016), "How Supportive Are Romanian Consumers of the Circular Economy Concept: A Survey", Sustainability (Switzerland), 8(8).

Lehner, M. et al. (2020), "Circular Economy in Home Textiles: Motivations of IKEA Consumers in Sweden", Sustainability (Switzerland), 12(12).

Leite, Rosangela Ferreira (2021), "Second-Hand Clothing: Consumption, Disease, and Disposal (São Paulo, 1900–1914)", Topoi (Brazil), 22(48), 787–806.

Lourenço, Maria Julia Muniz and Moraes, Heloisa Juncklaus Preis (2022), "The Reinterpretation of the Thrift Store as a Place of Memories", Revista FSA, 19(7) 295–307.

Magalhães, Aline, et al. (2021), "Compreendendo o Consumidor da Economia Circular: Uma Revisão Sistemática de Literatura", in XXIII ENGEMA, Vol. 10.

Maitre-Ekern, E., and Dalhammar, C. (2019), "Towards a Hierarchy of Consumption Behaviour in the Circular Economy", Maastricht Journal of European and Comparative Law, 26(3), 394–420.

Marques, António Dinis, et al. (2019), "From Waste to Fashion – a Fashion Upcycling Contest", Procedia CIRP, 84, 1063–68.

Muranko, Z., et al. (2018), "The Pro-Circular Change Model (P-CCM): Proposing a Framework Facilitating Behavioural Change towards a Circular Economy", Resources, Conservation and Recycling, 135(8), 132–40.

Napier, Elizabeth and Sanguineti Francesca (2018), "Fashion Merchandisers' Slash and Burn Dilemma: A Consequence of Over Production and Excessive Waste?", Rutgers Business Review, 3(2).

Oliveira, Luana G., Miranda, F. G., and Dias, M. A. (2022), "Sustainable Practices in Slow and Fast Fashion Stores: What Does the Customer Perceive?", Cleaner Engineering and Technology, 6(2), 1–9.

Pinto, M., et al. (2020), "Consumer Behavior, Social Media, and Branding: How Second-Hand Fashion Is Getting Popular", Sustainability, 12(22), 1–20.

Secondhand Luxury: De-stigmatization Through Negotiation

Mengxi Gao

Jie G. Fowler

The concept of luxury has evolved significantly over time, originating in ancient Rome, where the Latin term *luxus* symbolized excess, extravagance, and waste. Luxury was closely associated with wealth and power, accessible only to an elite few who could obtain rare goods (Dari-Mattiacci & Plisecka, 2012). In medieval Europe, luxury took on a dual role, symbolizing nobility while clashing with prevailing moral values, particularly in the form of lavish clothing and ornate decorations (McNeil & Riello, 2016). During the Renaissance, the focus of luxury shifted toward aesthetics and art, emphasizing beauty and craftsmanship (Belozerskaya, 2005). By the 18th century, luxury became a prominent status symbol, reflecting the wealth and social standing of the upper class (Hilton, 2004).

The Industrial Revolution marked a turning point, as luxury goods became accessible to the emerging middle class through wealth accumulation (Fine & Leopold, 1990). In the 20th century, the emergence of luxury brands such as Chanel introduced luxury goods to a broader audience, signaling the rise of consumer culture and the mass consumption of luxury (Sadikhbeyova & Abdullayev, 2023; Willersdorf et al., 2020).

The global secondhand luxury market has experienced significant growth, reaching $34.2 billion in 2023, with projections indicating an expansion to $73.2 billion by 2032 (IMARC, 2023). Among the product categories, handbags lead as the most sought-after items, followed by jewelry, watches, apparel, and small leather goods. Geographically, Europe, the United States, and China are the primary markets for secondhand luxury goods. Notably, China's growth in this sector is fueled by its expanding middle class and increasing consumer interest in luxury.

Both new luxury fashion products and secondhand luxury goods symbolize status, exclusivity, and scarcity for consumers. However, secondhand luxury goods hold a unique position by blending affordability, exclusivity, and potentially social stigma. Hence, this research seeks to uncover the interplay between sellers' and consumers' coping strategies against stigma, offering a deeper understanding of the evolving dynamics in the secondhand luxury market.

Stigma as a Social Dynamic Phenomenon

In Goffman's (1969) work, stigma was examined within the framework of social structures, conceptualized as the discrepancy between an individual's virtual and actual social identities. Stigma arises when specific characteristics or behaviors of an individual deviate from established social norms and expectations. Consequently, social stigma emerges as a socially constructed attribute within interpersonal interactions, resulting in widespread social discrimination, devaluation, and threats to one's social identity (Homburg & Ukrainets, 2021). It may affect individuals, groups, brands, or products (Rocha & Veloso, 2024) and reinforces social hierarchies, relegating those marked by stigma to a subordinate position (Harmeling et al., 2021).

The manifestation of stigma is embedded within particular social contexts and is shaped by cultural, social, and historical conditions (Zhang et al., 2021). These contexts influence the perception and evaluation of specific traits, which, in turn, shape the formation and expression of stigma. Notably, a characteristic considered stigmatized in one context may be regarded as normative or even positively valued in another. For instance, divorce is often stigmatized in many Eastern cultures, whereas it is generally more socially accepted in Western societies.

For example, the Islamic headscarf in Turkey was historically viewed as incompatible with modernity and was prohibited in public spaces during periods of modernization. It was stigmatized as a symbol of rural and traditional life. Over time, however, the headscarf has been redefined as a medium for Muslim women to assert their identity and integrate fashion with religious expression (Sandikci & Ger, 2010). Similarly, advancements in the LGBT rights movement have contributed to greater societal acceptance of previously stigmatized sexual orientations (Montecchi et al., 2024). Stigma, therefore, is not static but is influenced by shifting social factors and broader societal changes. Its emergence, persistence, and transformation are closely tied to the evolving cultural and historical context (Zhang et al., 2021). This dynamic process underscores the interplay between social structures and the continuous renegotiation of stigma in response to societal developments.

Bos et al. (2013) further extended the categorization of stigma by identifying four major types: public stigma, self-stigma, associated stigma, and structural stigma. Public stigma refers to the general public's negative evaluation of a specific group. Self-stigma occurs when members of a stigmatized group internalize these negative perceptions, leading to reduced self-esteem. Associated stigma refers to those who have close relationships with stigmatized individuals, while

structural stigma refers to biases and discrimination against stigmatized groups embedded within societal systems.

The Challenges of Secondhand Luxury Goods in Maintaining Institutional Logic

Prior studies show consumers who purchase secondhand luxury goods may fear being viewed as financially disadvantaged, which can result in discreet purchasing habits or hesitancy to make such purchases (Lo et al., 2019). The entry of luxury goods into the secondhand market challenges the traditional institutional logic of luxury, which is grounded in notions of scarcity, exclusivity, and social distinction. The reduced price points of secondhand luxury goods diminish the "luxury signal" that has historically been tied to significant financial expenditure. This shift raises critical questions about whether the purchase of such products conveys an impression of limited economic resources. Consumers who opt for secondhand luxury fashion are often labeled as "poseurs"—individuals perceived as unable to afford brand-new luxury items but seeking to attain status symbols nonetheless (Han et al., 2010; Tu et al., 2022). Such consumption behavior can be interpreted as indirect evidence of resource scarcity, reinforcing social stigma in the institution (Argo & Main, 2008; Rathi et al., 2023)

As a result, marketers have increasingly sought to understand and address the role of stigma in shaping buyer's behavior. Researchers have explored stigma-reduction strategies. For example, framing has been shown to reshape consumer perceptions, such as reducing overconsumption by promoting sustainability and resource-conscious behavior (Fan et al., 2021). Reframing menstruation as a normal physiological process rather than a source of embarrassment has been demonstrated to increase women's purchase intentions for sanitary brands (Srivastava et al., 2024). Despite these advances, limited research exists on how stigma functions within status consumption categories, such as secondhand luxury, which inherently challenge the institutional logics of exclusivity, status, and scarcity (Rocha & Veloso, 2024).

Used luxury goods are regaining popularity in the market (Times, 2025), highlighting an evolving consumption landscape. Thus, the secondhand luxury market represents a unique context to examine the coping strategies by both sellers and buyers. This research, therefore, seeks to investigate the coping strategies employed by buyers and sellers in this context, focusing on how stigma is negotiated and managed within these interactions. This exploration aims to contribute to a deeper understanding of stigma dynamics in status consumption.

Method and Future Research

This study employs a phenomenological approach to investigate consumers' coping strategies in response to stigmatization and sellers' de-stigmatization strategies within the marketing system. A phenomenological methodology facilitates an in-depth exploration of the lived experiences and perceptions of consumers concerning specific products or market phenomena (Thompson, Locander, & Pollio, 1989; Hirschman, 1985). By analyzing personal narratives, this study seeks to uncover nuanced insights into the mechanisms by which consumers navigate socially constructed biases and stigmas.

Focusing on the secondhand luxury market, this research examines the role of social stigma in shaping consumer behavior and seller strategies, advancing stigma theory by framing it as a dynamic social construct. It explores the coping mechanisms consumers adopt to mitigate stigma and evaluates the effectiveness of messaging strategies employed by sellers. At a macromarketing level, this study emphasizes the role of stigma negotiation.

References

Argo, J. J., & Main, K. J. (2008). Stigma by association in coupon redemption: Looking cheap because of others. *Journal of Consumer Research*, *35*(4), 559-572.

Belozerskaya, M. (2005). Luxury arts of the Renaissance.

Bos, A. E., Pryor, J. B., Reeder, G. D., & Stutterheim, S. E. (2013). Stigma: Advances in theory and research. *Basic and applied social psychology*, *35*(1), 1-9.

Dari-Mattiacci, G., & Plisecka, A. E. (2012). Luxury in ancient Rome: scope, timing and enforcement of sumptuary laws. *SSRN Electronic Journal*, *1*, 2010-2003.

Fine, B., & Leopold, E. (1990). Consumerism and the industrial revolution. *Social History*, *15*(2), 151-179.

Han, Y. J., Nunes, J. C., & Drèze, X. (2010). Signaling status with luxury goods: The role of brand prominence. *Journal of marketing*, *74*(4), 15-30.

Hilton, M. (2004). The legacy of luxury: Moralities of consumption since the 18th century. *Journal of Consumer Culture*, *4*(1), 101-123.

IMARC. (2023). *Secondhand Luxury Goods Market Report by Product Type (Handbags, Jewelry & Watches, Clothing, Small Leather Goods, Footwear, Accessories, and Others),*

Demography (Women, Men, Unisex), Distribution Channel (Offline, Online), and Region 2024-2032. https://www.imarcgroup.com/secondhand-luxury-goods-market

Kessous, A., & Valette-Florence, P. (2019). "From Prada to Nada": Consumers and their luxury products: A contrast between second-hand and first-hand luxury products. *Journal of Business Research*, *102*, 313-327.

Ki, C., Li, C., Chenn, A., Chong, S., & Cho, E. (2024). Wise consumer choices in online secondhand luxury (OSHL) shopping: An integrated model of motivations, attitudes, and purchase intentions for OSHL as wise, conspicuous, and sustainable consumption. *Journal of Retailing and Consumer Services*, *76*.

Lo, C. J., Tsarenko, Y., & Tojib, D. (2019). To tell or not to tell? The roles of perceived norms and self-consciousness in understanding consumers' willingness to recommend online secondhand apparel shopping. *Psychology & Marketing*, *36*(4), 287-304.

McNeil, P., & Riello, G. (2016). Luxury: A rich history.

Rathi, R., Jain, S., & Garg, R. (2023). Exploring young consumer's adoption of secondhand luxury: insights from a qualitative study. *Journal of Fashion Marketing and Management*, *28*, 117-138.

Sadikhbeyova, S., & Abdullayev, V. (2023). 20th Century French Fashion Design. *Journal of Pharmaceutical Negative Results*, 1149-1154.

Srivastava, A., Nasa, J., Satyavageeswaran, P., Dubelaar, C., & Nanarpuzha, R. (2024). Advertising Stigmatized Products: Leverage Social Norms or Break the Stigma? *Journal of Business Research*, *183*, 114837.

Tu, J., Hsu, C., & Creativani, K. (2022). A Study on the Effects of Consumers' Perception and Purchasing Behavior for Second-Hand Luxury Goods by Perceived Value. *Sustainability*, *14*.

Viglia, G., Zaefarian, G., & Ulqinaku, A. (2021). How to design good experiments in marketing: Types, examples, and methods. *Industrial marketing management*, *98*, 193-206.

Vyncke, B., & Van Gorp, B. (2020). Using counterframing strategies to enhance anti-stigma campaigns related to mental illness. *Social Science & Medicine*, *258*, 113090.

Willersdorf, S., Hazan, J., Ricci, G., Prénaud, A., Bianchi, F., Seara, J., & Yang, V. (2020). A new era and a new look for luxury. *BCG Global*.

Sports Fandom as a Marketing System: Examining Group Identity, Reciprocity, and Market Externalities from a Macromarketing Perspective

Ken Sumida

Takayuki Kubota

Akihiko Taniguchi

Introduction

Sports spectatorship is not merely a form of entertainment or commercial transaction but represents a complex social system embedded within a broader marketing system, making it a crucial subject for macromarketing analysis. Fans are more than just consumers, they actively co-create value by engaging in shared norms and values (Mittelstadt, Kilbourne, and Mittelstaedt 2006; Wooliscroft 2021).

Sports fandom is shaped by both formal and informal structures, ranging from league regulations and team governance to implicit social norms among fans. This ecosystem extends beyond the direct relationship between fans and teams, encompassing interactions with various stakeholders, including local governments, local businesses, sponsors, and media (Hunt, Hass, and Manis 2021). The Japanese professional soccer league (J-League) operates under the slogan "Let's use the J-League (to solve regional issues)," actively participating in initiatives aimed at addressing local challenges. For example, the J-League club Kawasaki Frontale collaborates with the city of Kawasaki to promote employment for individuals with disabilities by providing them with work experience opportunities at home games. Within this ecosystem, sports teams serve as central entities generating positive market externalities, including revitalization of local economic activities, strengthening of community cohesion, and reinforcement of collective identity. This discussion on externalities is informed by Padela, Wooliscroft, and Ganglmair-Wooliscroft's (2021) work on brand externalities.

The example of J-League's social initiatives suggests that sports teams can extend their role beyond mere entertainment providers to facilitate socially contributive behavior among fans. As organizations embedded in local communities, sports teams influence fans not only as consumers but also as socially engaged individuals. This study posits that sports teams, by reinforcing a sense of belonging to their mission and vision, can foster altruistic behaviors among fans (Nakagawa, Yokota, and Nakanishi 2021). Consequently, sports teams can function as catalysts for social good, contributing to both supporters' and the broader community's well-

being. Investigating how fans' perceptions of teams' business activities (both sports entertainment and social initiatives) influence group belongingness and mutual interdependence is crucial for sports marketing research. Furthermore, understanding how these perceptions impact fan consumption behavior and prosocial behavior within the broader marketing system is of significant importance.

Existing research has extensively examined the social and economic roles of marketing systems (Peterson 2006; Shapiro 2006; Varadarajan 2017) as well as sports fans' consumption behavior. However, there is a lack of systematic analysis regarding how sports teams' mission and vision influence fans' prosocial behaviors. This study aims to bridge this gap by positioning the function of sports teams within the framework of macromarketing, providing new insights for sports marketing research. Specifically, this study seeks to clarify how shared recognition of a sports team's mission and vision fosters fan belongingness and interdependence, and how these factors influence consumption behavior and prosocial behavior. By conducting this analysis, this research demonstrates that sports teams are not merely entertainment providers but also facilitators of fan engagement and community formation within the marketing system.

Literature Review on Collective Behavior in Sports Fandom and Hypothesis Development

This study conceptualizes sports fans as key actors within a dynamic marketing system shaped by social identity processes and structured relationships. This study draws on two primary theories to explain fan collective behavior. The first is Social Identity Theory (SIT), which explains how fans develop psychological belonging to a team and experience identity salience, driving self-worth or self-esteem through social comparison with out-groups and forming loyalty and engagement (Ellemers and Haslam 2012; Theodorokis et al. 2012).

In contrast, Bounded Generalized Reciprocity (BGR) emphasizes the role of mutual interdependence in sustaining economic and social exchanges within social groups such as fan communities (Yamagishi and Kiyonari 2000). According to Yamagishi and Kiyonari (2000), within a psychologically defined group, individuals who perceive mutual reciprocity among members are likely to exhibit in-group favoritism. This behavior is driven by perceived obligation and indirect reciprocity, wherein individuals expect reciprocal actions not necessarily from the direct recipient of their altruistic behavior but from the broader group. When indirect reciprocity is perceived within a group, members are more likely to engage in altruistic actions to maintain in-group cohesion. Nakagawa et al. (2022) empirically demonstrated that both social identity (group

identification) and perceived interdependence within Japanese professional baseball fan communities drive altruistic behavior.

Based on this theoretical foundation, this study examines how shared recognition of a sports team's mission and vision strengthens fans' sense of belonging and interdependence and how these factors influence consumption behavior and prosocial behavior. From the SIT perspective, psychological affiliation with a team is a key driver of fan behavior, whereas from the BGR perspective, mutual interdependence within fan communities fosters consumption behavior and prosocial behavior. The following hypotheses are proposed:

H1: Greater shared recognition strengthens group belongingness, reinforcing social norms and brand attachment.

H2: Greater shared recognition enhances perceptions of mutual interdependence, reinforcing a sense of collective interdependence.

H3: Stronger group belongingness increases consumption intention, supporting the sustainability of the marketing system.

H4: Greater interdependence increases the likelihood of altruistic behavior, reinforcing socially contributive norms within the fan community.

H5: Stronger group belongingness fosters altruistic behavior, contributing to positive market externalities.

H6: Greater perception of interdependence increases consumption intention, promoting long-term economic sustainability within the fan ecosystem.

Research Methodology

This study employed an online survey methodology using Freeasy, a self-administered questionnaire tool provided by iBridge Corporation. The following section outlines the survey instrument used in this study.

To measure fans' sense of belonging and perceived interdependence, we adapted the items from Nakagawa et al. (2022). Since these items were originally developed for Japanese professional baseball fans, they were deemed appropriate for this study, which also targets a Japanese audience. For consumption behavior intention, we measured seven consumption-related behaviors, including attending stadium games, purchasing team merchandise, and following the team's social media accounts. For prosocial intention, we assessed four specific scenarios reflecting altruistic actions among fans: helping a fan who appears unsure about

transfers on a bus or train, picking up scattered belongings when another fan's bag tears open, offering a seat to a fan using crutches on a bus or train, and assisting a fan who drops their keys down a drainage grate by helping to open the grate and retrieve them.

To measure shared understanding of the team's mission and vision, we assessed respondents' level of respect for and alignment with the team's mission and vision. All items were measured using a 7-point Likert scale.

The survey targeted supporters of professional sports teams in Japan, specifically from Nippon Professional Baseball (NPB), the J-League, and Japan professional basketball league, the B. League, ensuring relevance to macromarketing research. The final sample comprised 849 respondents, and the data were analyzed using confirmatory factor analysis (CFA) and structural equation modeling (SEM).

Results

The model fit indices were within acceptable levels (GFI = .801, AGFI = .747, CFI = .892, RMSEA = .090), supporting the robustness of the conceptual model. Reliability analysis indicated internal consistency across key constructs, validating the survey findings. SEM analysis confirmed statistical significance for H1 through H4, supporting the theoretical integration of SIT, BGR, and structured relationships within the macro-marketing framework. However, H5 and H6 were not supported, suggesting the presence of additional mediating factors between perceived interdependence and economic behavior.

Discussion: Theoretical Contribution

The findings underscore the role of sports fandom as a structured marketing system embedded within a broader socio-economic context. While the results supported the theoretical integration of SIT, BGR, and structured relationships, the non-significance of H5 and H6 suggests potential moderating or mediating variables that influence the nexus between perceived interdependence and economic behavior.

The results indicate that group belongingness plays a fundamental role in fostering consumption behavior, reinforcing the sustainability of sports teams through merchandise sales, ticket purchase, and digital engagement (Varadarajan 2017). Additionally, perceived interdependence fosters prosocial behavior, strengthening social trust and community engagement, which align with previous findings on collective reciprocity (Nakagawa et al. 2022; Yamagishi and Kiyonari 2000). However, the lack of support for H5 and H6 suggests that perceived

interdependence alone does not directly translate into increased economic participation, implying the presence of additional psychological or contextual factors.

One possible explanation is that the consumption behavior of fans may be mediated by emotional attachment or identity salience, rather than direct reciprocity. Fans may feel a sense of moral obligation or emotional resonance with their team, which influences their purchasing decisions. This suggests that traditional economic models focusing solely on interdependence may not fully capture the complex interplay of identity-driven motivation in sports consumption.

Furthermore, the study highlights the need to distinguish between consumer-based loyalty and community-based mutual aid. While SIT primarily explains individual psychological attachment, BGR emphasizes structural interdependence. The findings suggest that sports teams function as both commercial brands and social institutions, with distinct mechanisms influencing fan behavior.

The findings highlighted the dual role of sports team as commercial brands and social institutions. Marketing strategies should go beyond consumer-focused tactics like merchandise sales and digital engagement. Strengthening fan belongingness through mission-driven campaigns and community initiatives can enhance both economic and social impact. Digital platforms should be leveraged to integrate in-person and online interactions, ensuring sustained engagement.

Conclusion

By integrating SIT, BGR, and structured market relationships, this study advances macro-marketing theory, demonstrating how identification, reciprocity, and structured interactions shape market dynamics, economic sustainability, and social welfare. Future research should explore additional mediating factors, such as digital communities and governance structures, to further clarify the role of sports teams within global marketing systems.

References

Ellmers, Naomi and Stephen A. Haslam (2012), "Social Identity Theory," in *Handbook of Theories of Social Psychology*, Paul A. M. Van Lange, Arie W. Kruglanski, and E. Tory Higgins, eds. London: Sage Publications Ltd, 379-98.

Hunt, Shelby D., Andrea Hass, and Katherine T. Manis (2021), "The Five Stages of the Macromarketing Field of Study: From *Raison D'être* to Field of Significant Promise," *Journal of Macromarketing*, 41(1), 10-24.

Mittelstaedt, John D., William E. Kilbourne, and Robert A. Mittelstadt (2006), "Macromarketing as Agorology: Macromarketing Theory and the Study of the Agora," *Journal of Macromarketing*, 26(2), 131-42.

Nakagawa, Yusuke, Kohei Yokota, and Daisuke Nakanishi (2022), "Ingroup Cooperation Among Japanese Baseball Fans Using the One-Shot Prisoner's Dilemma Game," *International Journal of Sport and Exercise Psychology*, 20(5), 1257-73.

Padela, Syed M. F., Ben Wooliscroft, and Andrea Ganglmair-Wooliscroft (2021), "Brand Externalities: A Taxonomy," *Journal of Macromarketing*, 1-17. https://doi.org/10.1177/0276146720961462.

Peterson, Mark (2006), "Focusing the Future of Macromarketing," *Journal of Macromarketing*, 26(2), 245-49.

Shapiro, Stanley J. (2006), "Macromarketing: Origins, Development, Current Status and Possible Future Direction," *European Business Review*, 18(4), 307-21.

Theodorakis, Nicholas D., Daniel L. Wann, Panagiotis Nassis, and Thomas B. Luellen (2012), "The Relationship Between Sport Team Identification and the Need to Belong," *International Journal of Sport Management and Marketing*, 12(1/2), 25-38.

Varadarajan, Rajan (2017), "Advances in Strategic Marketing and the Advancement of the Marketing Discipline: The Promise of Theory," *Journal of Marketing Management*, 34(1-2), 1-15.

Wooliscroft, Ben (2020), "Macromarketing and the System Imperative," *Journal of Macromarketing*, 41(1), 116-23.

Yamagishi, Toshio and Toko Kiyonari (2000), "The Group as the Container of Generalized Reciprocity," *Social Psychology Quarterly*, 63(2), 116-32.

Supervising AI for Macromarketing:

Contrasting logics in coding ambiguous and contextual data

Mikhail Bogach

Petteri Repo

Päivi Timonen

Macromarketers are coming to terms with the potential of AI, arguing that it will augment and complement human intelligence (Grewal et al. 2025, Arora et al. 2024). Nevertheless, the current performance of AI in marketing research is currently under scrutiny with explorative and comparative research being conducted in areas that examine structures of knowledge, mimicking consumer preferences and substituting human participation in market research (Dholakia et al. 2025, Qiu et al. 2023, Li et al. 2024).

Our study contributes to the understanding AI's capabilities at the very foundations of qualitative research, namely coding of research data. Computer assisted qualitative data analysis has a long history of application development in qualitative research (Kuckartz 2014, Weitzman 2000), highlighting human agency in the research process. In our work, we compare outcomes of human and AI coding of research data and reflect on their differences from the perspectives of ambiguity and contextuality. Our findings can be used to improve supervised application of AI for textual coding tasks.

Systematic content coding of research data is a common practice in qualitative research as it allows the researcher to categorize data in efforts to structure, interpret and connect them to theoretical debates. Coding, nevertheless, is often a laborious task that also requires attentiveness as well as sensitivity in interpreting data. Further, questions concerning the reliability and validity of the coding procedure need to be addressed rigorously (Kuckartz 2014). Macromarketing data sets can be very large, making advances in coding procedures requested.

Software developers have recognized this business opportunity, and widely used qualitative software such as ATLAS.ti and NVivo incorporate technologies that rely on artificial intelligence to make coding more efficient. Machine learning, training and coding instructions can assist researchers in automating coding by relying on artificial intelligence. Automation, nevertheless, reduces human control which is seen to play an important role in qualitative research. This is usually accounted for in software by allowing the researcher to change and

rearrange coding. Focus should, nevertheless, also be given to coding of individual instances in data in order to avoid systematic coding errors.

In this study, we assess the potential of applying Large Language Models (LLMs) to automate deductive coding while preserving researchers' control over the process. Our data set, derived from Oliveira (2024), consists of translated transcriptions of theme interviews on cases of democratic innovations where spoken language with inherent disfluencies and incomplete thoughts on abstract matters introduce an extra layer of ambiguity. The coding task consists of assigning each text item (a transcribed paragraph) to one of four predefined categories used in innovation studies: opportunities, barriers, requirements, or enablers. If the text was none of these, then it did not receive a code. Both the dataset and the coding task are typical of those encountered in qualitative research, allowing us to evaluate LLM performance based on a real-world scenario.

We developed a procedure that employs the textual processing capabilities of LLMs to automatically assign predefined codes to data instances while allowing researchers to retain control over the automation implementation and the verification of results. The procedure involves the development and integration of a codebook into a structured prompt, designed to combine AI coding instructions with two levels of context to capture context-sensitive nuances. Additionally, the prompt contained an instruction for LLM to provide a two-sentence justification for each coded instance, a useful element that is not usually included in coding practices, which enhances the examination of the coding procedure. The engineered prompt is then applied as a template to individual quotes for submission via the Application Programming Interface (API). The researcher examines the results after all quotes have been processed by the LLM and each response has been parsed. Figure 1 illustrates the coding process.

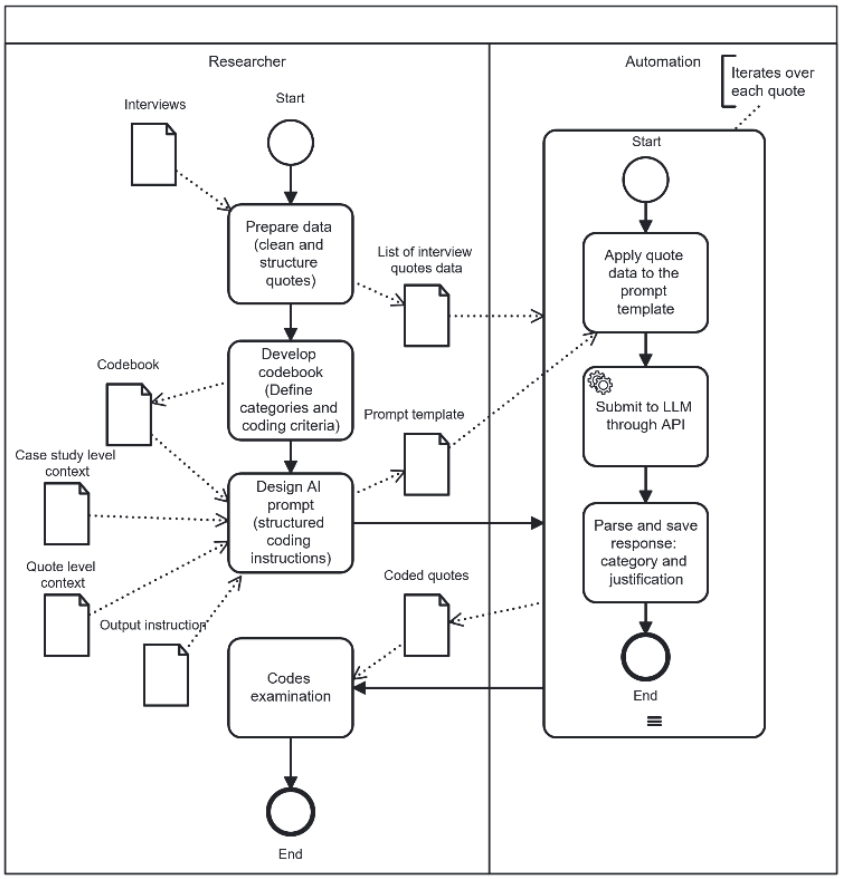


Figure 5. LLM-assisted coding process diagram

We tested this procedure with the Gemini 1.5 Flash LLM model with the temperature parameter set to 0.5 to reduce randomness (default: 1.0, range: 0.0–2.0) and compared the results with those from manual coding by experienced scholars. Table 1 provides an example where AI's and the researcher's codings did not coincide.

Table 1. Example of a quote coded differently by AI and researcher

Quote in data
We had no authority over water, no housing, no... we only had the human resources that allowed us to structure this debate - what knowledge do people have of human rights? (...) What does each person know about what they are entitled to and what their responsibilities are regarding these rights? And then we came to the issue of the human rights training program, and the SOMOS program. That was the way it came to me, that is, basically, we created an action plan that we called the social rights action plan. (...) We had

17 areas of work and what was transversal to all of these areas was this SOMOS program - the program is at the heart of democratic life or the implementation of democratic life.	
Code by AI	**Justification by AI**
requirements	The interviewee explains the initiative's origin stemmed from a lack of resources (water, housing) and a need to address a knowledge gap regarding human rights. This highlights the fundamental requirements—understanding of human rights—that necessitated the SOMOS program.
Code by researcher	**Justification by researcher**
enablers	the action plan was the enabler

The findings demonstrate that an LLM and a human researcher may follow contrasting logics. For instance, in the quote where the codes of a human researcher and the AI differ (see Table 1), the interviewee talks about factors related to an action plan. While the human researcher treats this action plan as an enabler for civic participation, the LLM accentuates the factors as requirements for the initiative to be established. Both coding choices can be logically argued for.

In our experiment, the LLM demonstrated an agreement rate of more than a third with the coding of a human researcher, suggesting limited alignment between how the researcher and AI assess texts. However, closer examination exposed that the low agreement rate could not be attributed to AI simply underperforming or the human coder for that matter. Instead, AI followed another logic that the human: AI systematically accentuated the role of persons mentioned in the data and considered them as enablers. The human coder, in turn, emphasized processes and identified requirements. Further, some discrepancies were due to the inability of LLM to apply researcher's tacit knowledge that is known to be difficult to translate into clear instructions. These findings help the researcher reflect on one's coding procedure by comparing its outcomes with those construed by the systematic logic of an automated intelligence.

Additionally, code justifications generated by the LLM enabled us to further explore the causes of disagreements. Here are key insights from such an analysis:

- LLM appears to generate more generic assessments leading to quite technical code assignments.
- LLM misses implicit meanings that human researcher can perceive easily.
- Shortcomings of LLM in recognizing key arguments in a text, whereas human researchers are apt to identify which ones are critical.
- Occasional 'hallucinations' where LLM generates codes not included in the instructions.
- Often LLM is stronger than a human in identifying patterns in text that are crucial for code assignment.
- When the text is disfluent and complex LLM may be better in observing keywords that are important for the code.

In conclusion, our study utilized a real-world dataset and task to examine how AI can augment and complement human intelligence (see Grewal et al. 2025, Arora et al. 2024). We observed and assessed the complexities of supervising application of AI for deductive coding, adding to the understanding of both its future potential and current limitations. While our results confirm that AI can be a useful tool when used under the close supervision of a researcher, they also highlight causes of contrasting logic of which some are inherent to the technology and others addressable with future improvements. We propose three directions for further research: (1) examining the causes of discrepancies between humans and AI to develop methodologies to address them; (2) investigating prompt engineering techniques to account for contrasting logics in how humans and AI perform coding tasks; and (3) exploring strategies and methods for integrating AI into textual coding tasks to better utilize its potential while ensuring validity.

References

Arora, Neeraj, Ishita Chakraborty and Yohei Nishimura (2025), "AI–Human Hybrids for Marketing Research: Leveraging Large Language Models (LLMs) as Collaborators," Journal of Marketing, 89 (2), 43–70.

Dholakia, Nikhilesh, Petteri Repo, Fuat Fırat, Inês Campos and Päivi Timonen (2025), "Artificial Intelligence, Structure of Knowledge, and the Future Directions for Macromarketing," Journal of Macromarketing, in press.

Grewal, Dhruv, Abhijit Guha and Marc Becker (2024), "AI is Changing the World: For Better or for Worse?," Journal of Macromarketing, 44 (4), 870–82.

Kuckartz, Udo (2014), Qualitative text analysis: A guide to methods, practice and using software. London: Sage.

Li, Peiyao, Noah Castelo, Zsolt Katona and Miklos Sarvary (2024), "Frontiers: Determining the Validity of Large Language Models for Automated Perceptual Analysis," Marketing Science 43 (2),254-266.

Oliveira, Sandra (2024), SOMOS - Municipal Education Programme for Democratic Citizenship and Human Rights. Internal project report, WP2, Inclusive Citizenship in a World in Transformation: Co-Designing for Democracy (INCITE-DEM). European Union GA 101094258. https://incite-dem.eu

Qiu, Liying, Param Vir Singh and Kannan Srinivasan (2023), "Consumer Risk Preferences Elicitation From Large Language Models," SSRN Scholarly Paper, Rochester, NY: Social Science Research Network.

Weitzman, Eben (2000), "Software and Qualitative Research," in Norman K. Denzin and Yvonna S. Lincoln, Y. S. (eds). Handbook of qualitative research 2nd ed., Thousand Oaks, CA: Sage, 803–820.

Systematic Literature Review: Place Branding in the Brazilian Context

Juliana Turano

Alessandra Baiocchi

Place Branding is a crucial tool for constructing the identity and enhancing the competitiveness of regions, cities, and countries, impacting investment attraction, tourism, and local development (Kavaratzis 2008, Hanna et al. 2020, Warnaby 2018). Beyond attracting external resources, it also strengthens local culture, communities, and collective well-being (Swain et al. 2023). In the Global South, particularly in Latin America, branding strategies interact with complex socio-political structures, influencing governance, cultural identity, and economic sustainability.

Despite several literature reviews on the topic, many focus on theory consolidation or are centered in predominantly Global North contexts. Vuignier (2017) offers a comprehensive view of the literature on Place Branding and Place Marketing between 1976 and 2016, highlighting the lack of conceptual clarity and the fragmentation of the field, as well as the predominance of qualitative approaches and case studies. Gertner (2011) observes that despite the field's growth, there is an absence of studies addressing political and institutional aspects of places, which are essential for public management. Hanna et al. (2020) provide a conceptual mapping of Place and Destination Branding, emphasizing the main challenges such as resistance from local stakeholders, the lack of alignment between different parties, and the need for a strategic approach that combines local culture with global expectations, but without a specific regional perspective.

The most recent literature review by Swain et al. (2023) examines both theoretical and practical contributions, identifying gaps such as the lack of empirical studies on the real impact of place branding strategies, pointing to the need for a greater understanding of the long-term effects of branding campaigns and how they influence consumer behavior and local development. They call for greater attention to regional contexts, stressing the need for branding strategies to consider cultural, political, and economic specificities.

The literature shows that regional aspects of Place Branding, particularly in Latin America, have been underexplored. Therefore, this study seeks to fill that gap by conducting a systematic review of Place Branding in Brazil, identifying regional dynamics and local challenges that influence the construction of place identities.

Following guidelines by Tranfield et al. (2003) and Hanna et al. (2020), this review will be systematically conducted to ensure transparency and rigor. Research will be conducted in databases such as Google Scholar, Scopus and Web of Science, with filters for “Brazil” and “Brazilian,” selecting articles from the last 20 years that focus on Place Branding in the Brazilian context.

Since Latin America, and especially Brazil, faces deep challenges in terms of inequality, sustainability, and urban development, this study can contribute to identifying existing gaps in Place Branding practices in Brazil and understanding how Place Branding can be a tool to promote sustainable development, focusing on SDGs related to social equality, environmental sustainability, and responsible consumption practices. From a macromarketing perspective, this study will investigate how branding strategies shape and are shaped by market structures, institutional frameworks, and social agency (DeQuero-Navarro et al. 2020).

Finally, this review is part of a doctoral thesis focused on understanding how branding practices impact the development of creative cities in Brazil.

References:

DeQuero-Navarro, B. et al. (2020), “A panoramic review of the macromarketing literature”, Journal of Macromarketing, *40*(1), 1-17.

Gertner, D. (2011), “Unfolding and configuring two decades of research and publications on place marketing and place branding”, Place Branding and Public Diplomacy, 7(1), 14-28.

Hanna, S. et al. (2020), “Place and destination branding: A review and conceptual mapping of the domain”, European Management Review, 17(2), 183-204.

Kavaratzis, M. (2008), “Place branding: A review of its implications for place marketing”, Place Branding and Public Diplomacy, 4(3), 191-207.

Tranfield, D. et al(2003), “Towards a methodology for developing evidence-informed management knowledge by means of systematic review”, British Journal of Management, 14(3), 207-222.

Vuignier, F. (2017), “Place branding & place marketing 1976–2016: A multidisciplinary literature review”, International Review on Public and Nonprofit Marketing, 14(1), 29-47.

The "*Do-Bem*" effect - Deconstructing the influence of sustainability claims on food healthiness perceptions

Ana Beatriz Aquino

Anuja Bhattacharjya

Lucia Barros

Short Abstract

Conscious consumption is on the rise, with consumers increasingly opting for sustainable foods. While previous studies show sustainability claims enhance perceived food healthiness, the reasons behind this "halo effect" remain unclear. This paper explores this effect across various food categories and investigates perceived brand consciousness as a potential explanation.

Extended Abstract

Food claims on the packaging, can significantly influence consumer product evaluation and consumption (Bublitz, Peracchio, and Block 2010). Brands use these claims strategically in advertising to build trust in the beneficial qualities of the product and improve their evaluation, (Kareklas et. al, 2014; Nocella and Kennedy 2012). Table 1 (adapted from Andre et. al, 2019) summarizes the taxonomy commonly used to classify different forms of claims on food and beverages.

TABLE 1

Categories of Claims	Subcategories of Claims	Content of Claims
Environment-related Claims[1]		Indicated that a product, service, process, brand, or business is better for the environment overall (e.g. organic, ecological farming, greenhouse gas certification, genetically modified, biodynamic production, fair trade production).
Health Claims	General health claim	States, suggests or implies the product benefits a certain health system (e.g. healthy, helps your digestive system, fit).
	Reduction of Disease claim	Relates the consumption of a food or food constituent to the reduced risk of developing a disease or health-related condition (e.g. calcium to reduce risk of osteoporosis, all heart-related claims).
	Nutrient and other function claim	Describes the physiological role of the nutrient in growth, development, and functions of the body (e. g. Includes calcium for stronger teeth and bones, fiber for balance).
Nutrition Claims	Health related ingredient claim	Amount of protein, fat and carbohydrates, as well as the content of vitamins and minerals.
	Nutrient claim	Describes/compares the level of a nutrient contained in a food (e.g. lower in fat, high in calcium).

The human mind associates healthy and sustainable behaviour to be similar, as both concepts reject short-term exploitation in favour of lasting benefits (Aschemann-Witzel 2015), and trust could play an important role in their evaluation of both forms of claims (Grunert 2005; Henchion et al. 2014). Prior research has delved into this perception of the sustainable/healthy heuristic (Lazzarini et al. 2016; Sproesser et al. 2023; Verain et al. 2016), revealing a consistent trend of a healthy halo effect associated with sustainable practices. Research even point out that a sustainable claim leads people to expect 24.1% fewer calories for 'organic' cookies, compared to regular ones (Lee et al. 2013). Essentially, when brands assert their connection to health and sustainability, they weave a compelling narrative that shapes consumer evaluations. However, this narrative also highlights the significant role of heuristics in moulding perceptions and choices within the market, illustrating their widespread influence on the intertwining of health and sustainability. Hence, we propose-

H1. As people mentally associate sustainability with health, Sustainable-related claims in products will increase perceptions of healthiness.

Brand authenticity can help signal brand trustworthiness and reliability, with the help of consistency in messaging and aligning with consumer values and expectations (Becker et al. 2019, Moulard et al. 2021). While consumers today are highly sceptical of sustainability (Ginder and Byun 2022), sustainability claims could function as a more tangible signal that the brand is genuinely committed to sustainability. In this scenario, one dimension of brand authenticity, perceived brand consciousness (Campagna et al. 2022) can play a role in mediating the sustainable/healthy heuristic by signalling an overall sense of perceived brand responsibility towards the planet. This is what we define as the "Do-bem" (*Do Bem* means "doing good" in Portuguese) effect , where consumers associate sustainability claims with the overall "do-good" nature of the brand, hence leading to increased perceived healthiness of the food item. Hence, we propose-

H2. Product consciousness perceptions will mediate the Sustainable/Healthy Halo Effect.

Study 1 was embedded as part of a larger study conducted to examine the role of different macro and micro health and sustainable labels on consumer perceptions. 437 individuals (48% male, Mage=28 years) were recruited through Prolific and responded to the survey upon providing their informed consent. Products used were defined across 3 categories- Unhealthy (Cookies and Condensed Milk), Intermediary (Bread and Jam), and Healthy (Yoghurt and Olive Oil). The study design included for analysis was a 4 (Type of claim- Healthy, sustainable, tasty and control) *6 (Type of Products) mixed design.

To confirm our manipulation, we asked - “How sustainable do you think the food is?”. Additionally, we measured our dependant variable with “How healthy do you consider this food? 1- Not Healthy and 7- Very Healthy.” Finally we measured covariates like BMI, dietary restrictions, age and gender.

A repeated-measures ANOVA with healthiness perception as the DV, and claims as the IV revealed a significant effect of sustainability claim on healthiness perception ($p<0.01$). Also, planned contrasts revealed a significant effect of sustainable claim (vs. control) on perceived healthiness ($p<0.01$), providing support for H1, and also on perceived sustainability ($p<0.05$), confirming our manipulation. Contrasts between individual products revealed no significant results.

Study 2 serves 2 purposes. We first test our main hypothesis with 2 different micro forms of sustainability claims, specifically- biodegradable packaging and sustainable sourcing. Secondly, we test the mediating role of perceived consciousness of the brand in the effect of sustainability claims on perceived healthiness of the food.

Data was collected from a convenience sample, via distributing the survey on social media accounts. 300 Brazilians (58% male, Mage=42 years, SD=14.6) took the study after agreeing to the consent form. Study design was a 3(Claim- control, sustainable packaging, sustainable sourcing)*1(product- yogurt) between-subjects design with participants being randomly assigned to one of the three conditions with an image manipulation. To minimize familiarity bias, a yogurt brand was selected that is not available in Brazil. The dependant variables were same as the previous study- healthiness perception and sustainability perception . Measures used were same

as previous study. We also included measures for perceived brand consciousness (to test for mediation) and perceived naturalness (as an alternate explanation).

A one-way ANOVA revealed a main significant effect of sustainability claims on perceived healthiness ($F(2, 297) = 4.081$, $p = 0.018$) and perceived tastiness ($F(2, 297) = 3.198$, $p = 0.042$). But planned contrasts revealed non-significant results between control and sustainable packaging claim and also control and sustainable sourcing claim, replicating the previous study. However, planned contrasts with sustainability claims and perceived healthiness revealed a significant effect of sustainable sourcing claim (vs. control) on perceived healthiness ($p<0.001$). Hence, we find support for H1.

To test for mediation, we run a Hayes PROCESS model 4 with 5000 bootstrapped samples, with claims as the IV, perceived healthiness as the DV and Perceived brand consciousness and perceived product naturalness as 2 parallel mediators. We find a significant positive effect of claims on perceived brand consciousness ($F(2, 297) = 16.92$, $p<0.001$) and on perceived healthiness ($F(2,297) = 62.44$, $p<0.001$). Effect of claims on perceived naturalness is non-significant ($p = 0.06$). Additionally, including Perceived brand consciousness in the model makes the effect of claims on perceived healthiness non-significant ($p = 0.75$) indicating complete mediation. The indirect effect of the IV on the DV was also significant with a 95% CI [0.42, 0.14]. These results support H2.

The contributions of our paper are two-fold. Not only do we demonstrate the halo effect of sustainability claims on healthiness perception of food across multiple categories of food items with varied general perception of healthiness, but we also introduce perceived brand consciousness as a mediator, a relationship previously unexplored in literature. This research has both significant managerial implications in the form of advertising and branding and policy implications for governments trying to promoting sustainability in food production and consumption.



Figure 1: Stimuli used for Study 2

References

André, Q., Chandon, P., & Haws, K. (2019). Healthy through presence or absence, nature or science?: A framework for understanding front-of-package food claims. *Journal of Public Policy & Marketing*, *38*(2), 172-191.

Aschemann-Witzel, J. (2015). Consumer perception and trends about health and sustainability: trade-offs and synergies of two pivotal issues. Current Opinion in Food Science, 3, 6-10.

Becker, M., Wiegand, N., & Reinartz, W. J. (2019). Does it pay to be real? Understanding authenticity in TV advertising. *Journal of Marketing*, *83*(1), 24-50.

Bublitz, M. G., Peracchio, L. A., & Block, L. G. (2010). Why did I eat that? Perspectives on food decision making and dietary restraint. *Journal of Consumer Psychology*, *20*(3), 239-258.

Campagna, C. L. (2022). The missing piece of the puzzle: How brand authenticity drives brand engagement.

Cho, Y. N., & Baskin, E. (2018). It's a match when green meets healthy in sustainability labeling. Journal of Business Research, 86, 119–129.

Díaz, L. D., Fernández-Ruiz, V., & Cámara, M. (2020). An international regulatory review of food health-related claims in functional food products labeling. *Journal of Functional Foods*, *68*, 103896.

Ginder, W., & Byun, S. E. (2022). To trust or not to trust? The interplay between labor-related CSR claim type and prior CSR reputation of apparel retailers. *Journal of Retailing and Consumer Services*, *65*, 102875.

Grunert, K. (2005). Food quality and safety: consumer perception and demand. European Review of Agricultural Economics, 32(3), 369–391.

Henchion, M. (2014). Meat consumption: Trends and quality matters. Meat Science, 98, 561-568.

Kareklas, I., Carlson, J. R., & Muehling, D. D. (2014). "I eat organic for my benefit and yours": Egoistic and altruistic considerations for purchasing organic food and their implications for advertising strategists. *Journal of advertising*, *43*(1), 18-32.

Lazzarini, G. A., Zimmermann, J., Visschers, V. H., & Siegrist, M. (2016). Does environmental friendliness equal healthiness? Swiss consumers' perception of protein products. *Appetite*, *105*, 663-673.

Moulard, J. G., Raggio, R. D., & Folse, J. A. G. (2021). Disentangling the meanings of brand authenticity: The entity-referent correspondence framework of authenticity. *Journal of the Academy of Marketing Science*, *49*, 96-118.

Lee, W. C. J., Shimizu, M., Kniffin, K. M., & Wansink, B. (2013). You taste what you see: Do organic labels bias taste perceptions?. *Food Quality and Preference*, *29*(1), 33-39.

Nocella, G. & Kennedy, O. (2012). Food health claims – What consumers understand. Food Policy, 37, 571-580.

Sproesser, G., Arens-Azevedo, U., & Renner, B. (2023). The "healthy= sustainable" heuristic: Do meal or individual characteristics affect the association between perceived sustainability and healthiness of meals?. *PLOS Sustainability and Transformation*, *2*(11), e0000086.

Trudel, R. (2019). Sustainable consumer behavior. *Consumer psychology review*, *2*(1), 85-96.

Verain, M. C., Sijtsema, S. J., & Antonides, G. (2016). Consumer segmentation based on food-category attribute importance: The relation with healthiness and sustainability perceptions. *Food Quality and Preference*, *48*, 99-106.

The human-animal relationship through the perspective of Brazilian homes.

Pedro Paulo Santos Cavalcante

Evandro Luiz Lopes

Eduardo Mesquita

Abstract

Purpose: The central objective of this study is to identify the dimensions that most explain the human-animal relationship in Brazilian homes.

Design/methodology/approach: A survey was conducted with 690 interviewees nationally, prepared using international psychometric scales.

Findings: As a result, the dimensions of pet-oriented lifestyle and anthropomorphism were those that best explained the human-animal relationship. Furthermore, the study demonstrated that most respondents have already experienced some type of financial stress because of their pet, suggesting that spending on pets is not fully included in the family budget.

Research limitations/implications: For future studies, to delve deeper into the extent of validity of these scales, and test them with other pet owners, such as owners of birds, fish, hamsters, among others.

Practical implications: The results of the study also have relevant managerial implications, suggesting that the process of purchasing products and services for pets involves a much more emotional sphere than a rational one.

Social implications: As a managerial contribution, one of the most important findings of this study, is to demonstrate how pet consumption is undersized in families' budgets, as the study manages to highlight, through pet owners' own statements, that they have already found themselves in situations of financial stress because of your pet.

Originality/value: The article contributes to the literature on psychometric scales by validating the application of international scales in Brazil, as well as proving that, despite being originally developed for dogs, with some considerations, the scales also work for cat owners.

Keywords: Consumption and Society, Consumer Behavior, Pets, Purchasing decision process, human-animal relationship.

1 Introduction

It is estimated that there were approximately 844 million dogs and cats in the world in 2018 (Statista, 2024). That same year, according to UN data (2023), there were 138 million children in the world, under the age of 1, which gave a ratio of more than 8 pets per child, under the age of one, on the planet. According to data from Health for Animals (2022), it is estimated that more than half of the world's population has at least one pet at home. In the United States, it is estimated that approximately 70% of households have at least one pet (American Pet Products Association, 2023), and in Brazil, approximately 65% of households have at least one dog or cat (PNS, 2019).

With a pet population close to 150 million, Brazil has the second largest number of dogs and cats in the world and represents the third largest pet market on the planet (IPB, 2023). According to the Instituto Pet Brasil (2020), the sector had revenues of BRL $35 billion in 2019. Data from the Brazilian Association of the Pet Products Industry (Abinpet, 2021) show that Brazil is in seventh position in countries with the highest rates of revenues in the pet market. According to data from SEBRAE (2019), the Brazilian pet sector is already larger in revenue than the white-goods appliances sector (refrigerators and stoves).

If dogs and cats were considered part of the Brazilian population, they would represent 23% of the population of this country, more than the number of children under 14 years of age, who represent 21% of the total population. Despite representing for almost 0.40% of the Brazilian Gross Domestic Product (GDP) (Abinpet, 2021), the pet sector is a segment that is still little studied. Despite quantitative studies on the sociodemographic character of pet owners' homes, little has been studied on the dimensions of the human-animal relationship. With the purpose of mitigating this gap, the objective of this study is to identify the main dimensions that explain the human-pet relationship in Brazilian homes.

As a result, this study suggests that men tend to spend more on pets than women, even though men prefer to be called pet owners, while women like to be called their pet's mothers. The study also has relevant managerial contributions by demonstrating that spending on pets does not seem to be completely included in the budget of pet owners. The results also suggest that the process of purchasing products and services for pets involves a much more emotional sphere than a rational one. It is recommended, for future studies, the application of these scales to owners of other pets.

This article is organized as follows: in the first session a literature review was presented on anthropomorphism, then on the human-animal relationship and finally on the dimensions of the human-animal relationship. We then highlight the method used in the empirical phase of the research. The penultimate section of this article presents the discussion about the results, and finally, the authors' final conclusions are presented.

2 Literature review

For the theoretical support of this work, no literature was found that brought together, in a single previous study, the themes of anthropomorphism, the human-animal relationship and the dimensions of the human-animal relationship. Therefore, it was decided to work with the three themes in this review, with the purpose of ensuring theoretical alignment between these three concepts.

Anthropomorphism

Anthropomorphism is “the attribution of human mental states (thoughts, feelings, motivations and beliefs) to non-human animals” (Serpell, 2003, p. 56). It is also understood as the attribution of human characteristics to inanimate forms (including brands) or animals (Khan, Anas, & Uddin, 2024).

According to Thomas (2010), it was at the beginning of the Renaissance that the concept of pet began to be developed, and what would later be called pet. This preference for Pets according to their pedigree, size, fur, exclusivity and lineage (Ryder, 2019) reveals how the very concept of the Pet itself has become an additional component in the construction of a lifestyle (Warder, 2005; Bourdieu, 2008; Ryder, 2019).

This stratification, segmentation and preference for pets, as part of the composition of a lifestyle, which represent a set of preferences that express, in the specific logic of each individual, symbolic subspaces, brings us closer to the literature of Bourdieu (2008), as well as by Warde (2005), who understands that the meaning of the pet has gone beyond its meaning as a product/object and its functionality, and points to an intricate system of meanings in the relationship between the individual, the social environment and the pet itself.

Deepening the debate about this new human-animal relationship, Belk (1996) and Hirschman (1994) observed how Pets represented a kind of “extended self” of their owners. For

Belk (1996), pet owners expect their animals to conform to their personality, family and lifestyle. To this end, a whole range of products and services have been offered for Pets, products that mimic the human lifestyle and consumption, however, transmuted into the animal universe.

Pets are located in an extremely ambiguous place between the human and animal spheres (Belk, 1988, 1996; Leach, 1983; Osório, 2019; Ingold, 1995), or, as Belk (1988) states, they are both at the same time. They are neither fully animal nor fully human, pets live in a separate category, sometimes anthropomorphized, sometimes (re/hyper) animalized or zoomorphized (Osório, 2019). Thus, it is worth saying that the more disconnected we become from other people, the deeper the bonds we form with pets (Dotson; Hyatt, 2008). The greater the bonds with pets, the more humanized this relationship becomes.

The Human-Animal Relationship

Domestic animals have entered not only in human homes, but also in their household costs, as well as being part of their own family dynamics. According to a study by the U.S. Pet Ownership and Demographics Sourcebook (2002), for 51% of dog owners, their pets are considered members of the family. In another study (American Veterinary Medical Association - AVMA, 2000), three quarters of those interviewed, who were married, stated that, when they get home, they greet their pets first, and only then talk to their spouses.

A study by Wag (2022), carried out with people who are returning to the presential work model after the restrictions imposed by the coronavirus pandemic, revealed surprising data, as 42% of fathers and mothers who returned to work say they missed it more pets than your children.

The process of humanizing pets in contemporary societies is taking place in such an accelerated and in-depth way that, according to data from the Consumer Affairs (2022) survey, carried out with millennials (people who were born between 1981 and 1995, and who represent 44% of animal owners in the United States), revealed that pets already occupy a greater emotional space in their owners' lives than that of their relatives and family members. According to this survey, 81% of millennials admitted to loving their pets more than at least one family member. Also, 57% said they loved their pet more than their brother or sister, and 50% said they loved their pet more than their own mother. Finally, 30% stated that they love their animals more than their partners.

The Dimensions of the Human-Animal Relationship

Hirschman (1994), Belk (1996) and, later, Solomon (2008), through qualitative studies, made the first sketches to profile pet owners, through their behavior. It is clear that these profiles, to a greater or lesser extent, are strongly intertwined in the concept of "extended self" by Hirschman (1994) and Solomon (2008).

Belk (1996) was one of the pioneering authors to apply the concept of "extended self" to pets. According to the author, pet owners expect their animals to conform to their personality, family and lifestyle. Hirschman (1994) also contributed to this debate and stated that pets can play different roles in the lives of their owners, whether in the individual, family or social sphere.

In a pioneering quantitative study, in which they attempted to stipulate the main dimensions of the human-animal relationship, Dotson and Hyatt (2008) proposed seven key dimensions, which best explained the relationships between humans and animals. They are: (1) Symbiotic Relationship; (2) Dog-Oriented Extended Self; (3) Anthropomorphism; (4) Activity/Youth; (5) Barriers; (6) Specialty Purchases and (7) Willingness to Adapt.

Advancing the model designed by Dotson and Hyatt (2008), Boya et al. (2012) proposed that, in fact, there are six dimensions that best explain the animal-human relationship, namely: (1) Dog-oriented lifestyle; (2) Anthropomorphism; (3) Structure and discipline; (4) Utility oriented; (5) Company limits and barriers; and (6) Appearance.

One of the greatest innovations of the model proposed by Boya et al. (2012) was the theoretical framework for hat would become the first variables that explained the consumption behavior of these pet owners. In the study by Dotson and Hyatt (2008), Special Purchases (Figure 3) were considered as a construct, or an additional dimension of the human-animal relationship. In Boya et al. (2012), this was called Consumption Behavior and clusters the dimensions of the human-animal relationship in the face of consumption behavior. For information, the article by Boya et al. (2012) was written in partnership with Dotson and Hyatt.

In the model proposed by Chen et al. (2012), there are three types of relationships between humans and pets, namely: Attachment, Interaction and Human Substitute. These three are highly in line with what Dotson and Hyatt (2008) and Boya et al (2012) had proposed. The great contribution of the new model was in the sphere of consumer behavior of pet owners. The authors segmented the pet owner into three clusters: Consumption value, Information collection

method and Retail choice criteria. In this sense, Chen et al. (2012) went further than Dotson, Hyatt and Boya, as they managed to cluster the profiles of pet owners into certain consumption patterns.

Given the similarity of the concept of some constructs, for this work, was done an adaptation of the scales proposed by Dotson and Hyatt (2008), Boya et al. (2012) and Chen et al. (2012). In Table 1, it is possible to see the description of the main dimensions of the human-animal relationship that the literature addresses, and which this work used as a reference, as well as the main characteristics and authors who provided the theoretical framework.

Table 1 - Description of the main dimensions of the human-animal relationship

Dimension of the Human-Animal Relationship	What it is?	Characteristics	Author(s)
Symbiotic Relationship	Mutually beneficial bond between human and animal	In such a relationship, the human is happier, less stressed, less lonely, safer and calmer, while the dog is treated like a child/person.	Dotson and Hyatt, 2008 and Boya *et al.*, 2012
Pet-Oriented Lifestyle	The animal is an extension of its owner and seen as the human	Individuals in this dimension tend to spend less time with other people	Dotson and Hyatt, 2008 and Boya *et al.*, 2012

	being's best friend	in general, due to their relationship with their pet. However, these individuals may have better relationships with other pet owners. The pet plays a central role in these people's lives.	
Anthropomorphism	The animal is perceived as a substitute for a child or	The dog owner who scores high on this dimension is	Dotson and Hyatt, 2008; Holbrook *et al*. 2001; Hirschman, 1994 and Belk, 1996

	as a member of the family and has the power to communicate with humans	likely to talk to his dog.	
Structure and Discipline - Utility Oriented	Animals serve as an incentive to make their owners more physically active	This dimension corresponds to the "childish and playful" theme of Holbrook et al. (2001). It captures how these owners may feel younger or like children.	Holbrook et al. (2001); Dotson and Hyatt, 2008; Boya et al., 2012 and Chen et *al.*, 2012

Companionship – Limits	This dimension reflects the lack of limits imposed on pets by their owners at home.	The animal walks freely around the house, on the furniture and can sleep in bed with its owners. Here it is also possible to observe that the configuration of the house was adapted for the presence of pets.	Dotson and Hyatt, 2008 and Boya *et al.*, 2012
Special Purchases	Purchasing behavior	It highlights consumption	Dotson and Hyatt, 2008 and Boya *et al.*, 2012

		habits, purchasing behavior and the special effort made to purchase products for pets.	
Willingness to adapt	Analyzes how willing the pet owner is to change their living and consumption patterns to adapt to their pet	These changes may be in relation to the configuration of the household, the vehicle and changes in consumption as a whole.	Dotson and Hyatt, 2008 and Boya *et al*., 2012
Appearance & Social Value	Analyzes the extent to	The pet gives social approval	Boya et al, 2012 and Chen *et al*., 2012

	which pet owners choose their pet based on appearance and social acceptance	and recognition, just as the pet's physical characteristics are the most preponderant.

Source: the authors (2024)

3 Method

To achieve the objective of this study, a survey was carried out, whose data collection instrument presented the variables of eight constructs, which explain the pet-human relationship. They are: Symbiotic Relationship, Pet Oriented, Anthropomorphism, Structure and Discipline - Utility Oriented, Companionship - Limits, Willingness to adapt and Appearance and Social Value.

These eight constructs are the consensus between the three international reference scales (Dotson and Hyatt, 2008; Boya et al, 2012; Chen, et al 2012), which had similar concepts, constructs and items among each other, as can be seen in table 1. To optimize these scales, we created a consensus scale, which is the adaptation of these three reference scales.

These eight constructs were measured through 69 statements, which can be seen in

Table 3, and were estimated using a five-point Likert scale anchored by 1- Strongly Disagree and 5- Strongly Agree. The survey also included 23 questions related to the sociodemographic characteristics of the pet owner, the pet, the home and its routine, the pet owner's behavior on social networks and their consumption behavior. The statements used were based on studies by Boya et al. (2008), Boya et al. (2012) and Chen et al. (2012).

The definition of the sample size followed the assumption established by Figueiredo et al. (2010), in which it is recommended that, for each psychometric variable, between five and ten interviews be carried out. Given that the data collection instrument consisted of 69 statements, the sample size was 690, of which 345 respondents were people who lived alone and the other half were people from other household arrangements. This decision was made because, according to a study carried out by Grupo ZAP and DogHero (2017), 53% of singles said they wanted to have a pet, with this number rising to 57% when the group was made up of divorced or widowed people. Therefore, it seemed appropriate to compare the consumption behavior of different family arrangements.

The National Household Sample Survey (PNAD) 2021 (PNAD, 2023) was used as a reference for the sample design. To make data capture feasible in all States of Brazil, the market research company Brazil Panels (https://www.brazilpanels.com.br/) was hired, which collected data between the months of February and March. 2023.

Regarding the inclusion criteria, people over the age of 18, who had a dog and/or cat for at least six months, were considered eligible to participate in the sample. Regarding the exclusion criteria, marketing or market research professionals, professionals involved in the

marketing of products and/or pets and owners of other types of pets other than dogs or cats were considered unfit.

Data were analyzed using descriptive statistics, confirmatory factor analysis and cluster analysis using Jamovi software.

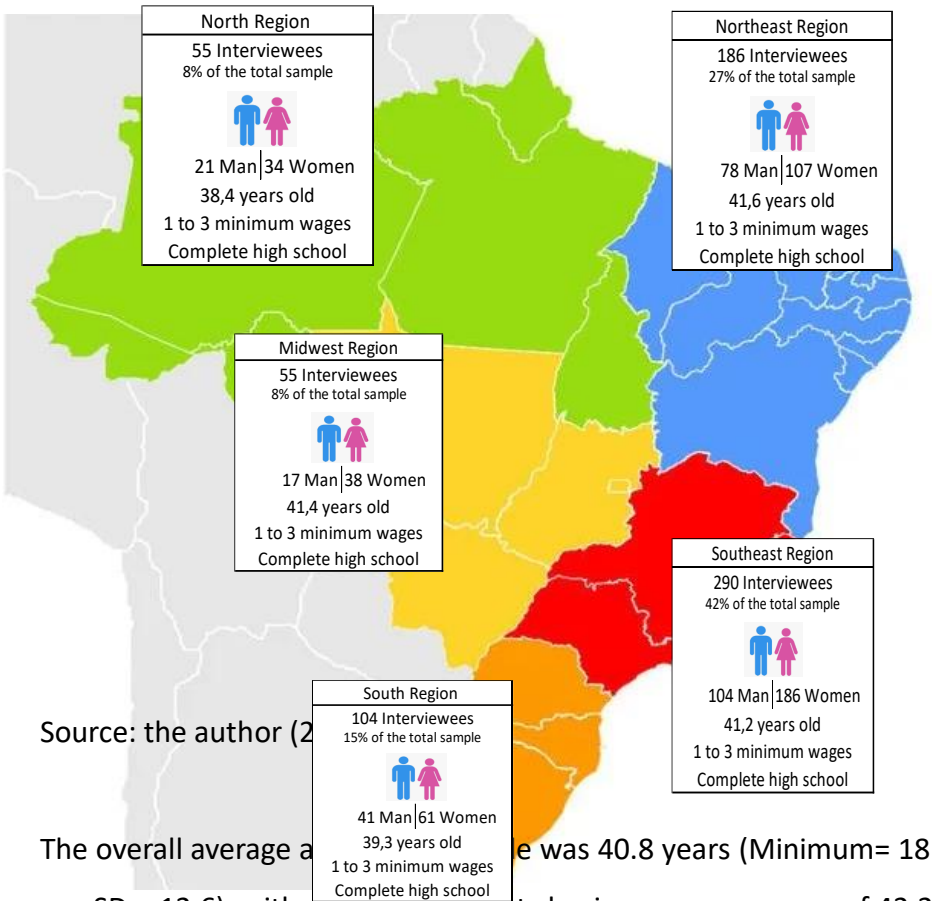
4 Results

This session will present the results of the survey that was applied for. To facilitate data interpretation, this chapter is organized as follows. First, an analysis of the general results of the socio-demographic data of the sample's interviewees was carried out, then the results were analyzed from the perspective of household arrangements and finally, the dimensions of the human-animal relationship were analyzed in a clustered manner.

4.1 Socio-Demographic Results

Of the 690 respondents, 261 declared themselves male and 426 declared themselves female, which accounted for 38% and 62% of the sample, respectively. The distribution of sex by region was as follows: North – 62% women and 38% men; Northeast – 58% women and 42% men; Midwest – 69% women and 31% men; Southeast – 64% women and 36% men and South – 59% women and 41% men. In Figure 1, it is possible to see the geographic distribution of the sample.

Figure 1 – Distribution of the sample by region, percentage participation of the sample, gender, age, education and income



Source: the author (2

The overall average a e was 40.8 years (Minimum= 18 years; Maximum = 76 years; SD = 12.6), with male respondents having an average age of 42.2 years (Minimum = 18 years; Maximum = 76 years; SD = 12.3) and female aged 40.0 years (Minimum = 18 years; Maximum= 72 years; SD = 12.7).

Income from 1 to 3 minimum wages was the most frequent in the sample, with this income range being the most cited in all regions (42% of women and 40% of men). Subsequently, income of up to 1 minimum wage was the second most cited in all regions and represented 33% of the average income of women and 20% of the income of men in the sample. It is concluded that the income of 70% of the 690 interviewees ranges from less than one minimum wage to 3 minimum wages, respectively.

Completed high school was the level of education observed in 40% of the entire sample and was also the most selected level of education in all regions of the country. Completed high school was selected by 40% of the women and men in the sample. Analyzing the sample by living arrangement, 345 respondents stated that they lived alone, which represented 50% of the sample. The second and third largest household arrangements were households with 5 and 3 people, which represented 15% and 14% of the sample, respectively. These three groups represented 79% of all respondents.

Of the 690 respondents, 58% were owners of dog(s), 25% of respondents were owners of cat(s) and the remaining 18% were respondents who declared themselves owners of cats(s) and dog(s). Regarding the main motivations for acquiring a pet, the reasons most cited by both men and women, were: company, fun and charity (adoption). Regarding the form of acquisition, the most cited was adoption, chosen by 43% of men and 41% of women interviewed. As a second and third option, I rescued it from the street or found it abandoned and received it as a gift.

Of the total sample, 336 respondents, which represented 49% of respondents, stated that they like to be called pet father or mother. Of these, 235 were female and 98 male, equivalent to 55% of respondents being female and 37% male. Also, 258 respondents, or 37% of the sample, preferred to be called owner, of which 128 were men and 130 women, which represented 49% of male respondents and 30% of female respondents.

In relation to the average monthly expenditure per pet, for both men and women, the main response was between BRL $101 and BRL $300, representing 63% of the responses from the general sample. Then, the second most cited option by men and women was less than BRL $100, which was responsible for 22% of all responses in the sample. Among the most hired services, both men and women cited bathing and grooming, as well as pet product delivery services. The least mentioned were psychologist services, day care and funeral plans. Regarding where pet owners usually buy products for their pets, both genders mentioned neighborhood pet stores and supermarkets, respectively.

When asked what factors were most taken into consideration when purchasing a product for their own pet, both genders cited the options quality, nutritional value, veterinarian's recommendation and price, respectively. When asked about the main channels for searching for information about pet care, men and women also had similar answers, citing Google, YouTube, Facebook and Instagram as the main sources of information, respectively.

4.2 Results due to family arrangements

Both, the average income and education level of households of people who live alone and the other household arrangements, followed the national trend. The average income that presented the highest frequency was 1 to 3 minimum wages and the most cited education options were complete secondary education, followed by complete higher education.

Just like family arrangements with more than one person, single-person homes also tend to prefer dogs. 58% of households with more than one person had a dog(s), while 57% of single-person households chose the same option. A small difference occurred in relation to cats, as 29% of homes with people living alone had a cat(s), compared to 25% of homes with more than one person. Finally, 14% of single-person arrangements had dog(s) and cat(s), compared to 22% of other arrangements.

Homes for people who live alone showed a tendency towards more humanized behavior than other household arrangements. 52% of people who live alone preferred to be called pet parent, compared to 44% in other household arrangements. Next, the second most selected option regarding the option of how they would like to be called in relation to their pet, 34% of people who live alone like to be called by their owner, compared to 41% in other household arrangements.

Regarding the main motivations for acquiring a pet, as well as in the general sample, both single-person home arrangements and others selected the following as the main reasons: companionship, fun and charity (adoption). Regarding the form of acquisition, the most cited option was adoption, chosen by 41% of single-person households and 43% of other types of

arrangements. As a second and third option, I rescued it from the street or found it abandoned and received it as a gift.

When asked about the average monthly expense per pet, in homes of people who live alone, the answer was between BRL $101 and BRL $300, also selected by 63% of other arrangements. Next, the most cited options were less than R$100 and between BRL $301 and BRL $500, cited by approximately 22% and 12% of both groups, respectively.

Among the most and least contracted services, all home arrangements were unanimous in their responses, with the most contracted services being bathing and grooming and pet product delivery services. The least mentioned were psychologist services, day care and funeral plans. Regarding where pet owners usually buy products for their pets, both mentioned neighborhood pet stores and supermarkets, respectively.

When asked what factors were taken into consideration when purchasing a product for their own pet, as well as in the general sample, the home arrangements also showed harmony in their responses, citing the options: quality, nutritional value, veterinarian recommendation and price, respectively. When asked about the main channels for searching for information about pet care, home arrangements also had similar responses, citing Google, YouTube, Facebook and Instagram as the main sources of information, respectively.

4.3 Results in the human-animal dimension

In Table 2, it is possible to observe all the items that had a p-value < 0.001, as well as the reliability measurement made on the construct items, through Cronbach's alpha analysis.

This corroborates and demonstrates the solidity of the theoretical model that was being tested, given the high statistical significance, as well as demonstrating how well the proposed model adjusted to the observed data.

Table 2 - Confirmatory Factor Analysis of the constructs and their respective items

Factor	Indicator	Estimates	Standard error	Z	p	Standard Estimates
Anthropomorphism	I treat my pet like a person	0.966	0.0439	22.02	< .001	0.728
	Having a pet is like having a child living at home	0.892	0.0411	21.73	< .001	0.722
	My pet is my best friend	0.853	0.0371	22.98	< .001	0.752
	My pet is an extension of myself	1,062	0.0426	24.90	< .001	0.794

My Pet has a lot of my personality	0.966	0.0431	22.43	< .001	0.738
I see pets more as people than wild animals	1,036	0.0454	22.84	< .001	0.748
My pet is like a child to me	1,002	0.0401	24.99	< .001	0.795
I learn a lot from my pets	0.945	0.0378	25.03	< .001	0.796
I have the same responsibilities as a parent when it comes to caring for my pet	0.969	0.0373	25.97	< .001	0.816
My pet is very similar to me	1,071	0.0439	24.40	< .001	0.783
I like to spoil my pet	0.918	0.0387	23.75	< .001	0.768
I like to celebrate my pet's birthday	1,006	0.0523	19.25	< .001	0.658

	When I talk to my pet, I speak with a child's voice	0.957	0.0515	18.60	< .001	0.640
	My Pet understands my main emotions, when I am sad, happy or angry	0.946	0.0412	22.97	< .001	0.750
Pet-Oriented Lifestyle	When I'm stressed, being with my pet calms me down	0.914	0.0337	27.10	< .001	0.839
	Pets make the world a better place for me	0.898	0.0333	26.98	< .001	0.837
	I'm a happier person because of my pet	0.946	0.0335	28.22	< .001	0.860

I feel emotionally connected to my pet	0.954	0.0345	27.67	< .001	0.850
My pet keeps me from feeling alone	0.853	0.0360	23.65	< .001	0.766
My pet's psychological well-being is an important concern for me	0.847	0.0346	24.49	< .001	0.785
My Pet gives me a feeling of psychological well-being	0.896	0.0340	26.33	< .001	0.824
I would not be willing to establish a relationship with someone who	0.931	0.0430	21.63	< .001	0.719

was not willing to accept my pet					
I am willing to make sacrifices for my Pet	0.946	0.0411	23.04	< .001	0.753
My pet is part of my family	0.888	0.0338	26.30	< .001	0.823
I can't imagine a home without pets	0.948	0.0428	22.14	< .001	0.731
My pet keeps me young	0.925	0.0455	20.34	< .001	0.687
I often play with my pet	0.826	0.0361	22.87	< .001	0.748
I like going for walks with my pet	0.762	0.0464	16.42	< .001	0.579
I regularly give my pet treats	0.422	0.0580	7.28	< .001	0.277

Structure and Discipline - Utility Oriented	Having a pet makes me feel safer	0.796	0.0396	20.08	< .001	0.687
	I feel like I can communicate with my pets	0.876	0.0380	23.09	< .001	0.762
	Having a pet force me to exercise more	0.837	0.0493	16.96	< .001	0.600
	I often spend time training my pet	0.741	0.0551	13.46	< .001	0.513
	I have many established rules that my Pets must follow	0.545	0.0537	10.16	< .001	0.388
Companionship – Limits	Spending time with my pet stops me from spending as	0.709	0.0552	12.84	< .001	0.474

much time with other humans					
My pet helps me develop better relationships with other people	0.984	0.0425	23.14	< .001	0.753
I prefer to spend time with my pet than with other humans	0.892	0.0435	20.49	< .001	0.691
My Pet understands my main emotions. When I am sad, happy or angry	0.910	0.0371	24.49	< .001	0.785
I let my pet sit on the furniture in the house	0.843	0.0565	14.94	< .001	0.544

	I like having my pet sleep in bed with me	0.867	0.0595	14.58	< .001	0.534
	My Pet is allowed to roam anywhere in the house/apartment	0.845	0.0456	18.52	< .001	0.641
	I travel with my pets	0.676	0.0610	11.08	< .001	0.413
Special Purchases	I buy items online for my pet	1,122	0.0533	21.05	< .001	0.707
	I am loyal to certain brands of pet food	0.746	0.0468	15.96	< .001	0.569
	I buy luxury items for my pet	1,085	0.0503	21.57	< .001	0.720
	I buy items for my pet on impulse	1,053	0.0534	19.74	< .001	0.674

I'm willing to go out of my way to find special products for my pet	1,073	0.0494	21.72	< .001	0.723
Price is not an issue when it comes to buying something my pet likes.	1,031	0.0495	20.83	< .001	0.701
I always spend more than planned when I go to a store to buy my pet's basic items	1,147	0.0494	23.23	< .001	0.759
I spend a lot of money on my pet	1,047	0.0480	21.81	< .001	0.725

I look for special products for my pet	1,033	0.0451	22.92	< .001	0.752
I like to buy gifts for my pet	1,062	0.0467	22.75	< .001	0.748
I buy the healthiest food for my pet, regardless of the price	0.926	0.0452	20.51	< .001	0.694
I take my pet to the vet regularly	0.856	0.0446	19.20	< .001	0.660
I've already been financially strapped due to some treatment for my pet.	0.902	0.0569	15.85	< .001	0.565
I have my pet's costs well planned	0.723	0.0488	14.80	< .001	0.534

I buy items in physical stores for my pet	0.751	0.0471	15.93	< .001	0.568
I buy items from online stores for my Pet	1,148	0.0537	21.38	< .001	0.716
Having a pet affected the choice of the configuration of the space where I live	0.845	0.0581	14.54	< .001	0.526
Having a pet has changed my grocery shopping habits	1,004	0.0531	18.93	< .001	0.652
I regularly buy medical supplies for my pet	0.981	0.0485	20.24	< .001	0.686

	Owning a pet has affected the layout of my home	0.793	0.0590	13.44	< .001	0.491
	Owning a pet has affected my property's outdoor setup	0.779	0.0577	13.50	< .001	0.493
Appearance	I chose my Pet because he looks cool	1,057	0.0540	19.59	< .001	0.685
	What I value most about my Pet is because his appearance is beautiful.	1,061	0.0555	19.11	< .001	0.672
	My pet gives me social approval	1,273	0.0492	25.89	< .001	0.831
	My pet gives me a good	1,122	0.0498	22.51	< .001	0.756

	impression on other people					
	My pet improves the way I am perceived	1,243	0.0488	25.47	< .001	0.822
Social media	I think it's cool that pets have profiles on social media	1,084	0.0542	20.01	< .001	0.696
	I've already posted a photo of my pet on social media	0.876	0.0528	16.61	< .001	0.606
	I have more photos with my pet than with my close friends and family	1,207	0.0533	22.66	< .001	0.763
	I use social media as a	1,147	0.0510	22.47	< .001	0.761

	source of
	inspiration about
	PET care

Source: the authors (2024).

4.4 Results by cluster

For cluster analysis, four groups were used, given that this number of groups presented the lowest number of overlapping information, as well as leaving the data less dispersed among themselves. The cluster analysis was conducted using the K-means estimator (Hair et al., 2009), identified four distinct clusters. This sizing showed good consistency in addition to adequate intragroup homogeneity and intergroup heterogeneity.

Regarding the characteristics of the clusters, according to gender, cluster 1 is predominantly male, while clusters 2, 3 and 4 are predominantly female. Regarding the marital status aspect, cluster 2 is the one with the best distribution among the marital status options. Clusters 1 and 4 are massively composed of single people and made up of people who live alone.

In terms of income, clusters 1 and 4 present the most harmonious distribution among income options; cluster 2 has the highest income frequencies, cluster 3 has the highest frequency of low average income. In relation to education, cluster 1 is predominantly made up of people with completed high school. Clusters 2, 3 and 4 are divided between the Complete Secondary Education and Complete Higher Education options.

Clusters 1 and 2 are mostly made up of dog owners, Clusters 3 and 4 are more balanced between owners of dogs, cats and both. In parallel, participants in cluster 1 prefer to be called the pet's owner, while respondents in clusters 3 and 4 prefer to be called the pet's father or mother and cluster 2 prefers to be called various ways, with a relative predominance of the owner option of a pet.

In clusters 2 and 4, the majority form of acquisition was adoption. In clusters 1 and 3, although adoption is also the majority form, this group also has a relevant participation in acquisition through redemption and by receiving as a gift, as forms of acquisition. In relation to how much they spend per month and whether or not they have health insurance, all clusters were homogeneous in their response, with the majority saying that the average expenditure is around BRL $101 and BRL $300 reais. In parallel, all clusters stated that they do not have a health plan for pets.

Finally, the dimension of the human-animal relationship that presented the highest frequency was the Pet-Oriented Lifestyle relationship. This dimension was the one that most explained the human-animal relationship in all clusters. However, the clusters showed

differences in relation to the second dimension of the human-animal relationship. In cluster 1, the second most frequent option was Structure and Discipline - Utility Oriented. For clusters 2, 3 and 4, the second option was Anthropomorphism.

Finally, for a better comparative analysis of the preponderant intra-cluster characteristics, in Table 3 it is possible to see the main sociodemographic characteristics of each cluster, as well as the dimension of the human-animal relationship that most explains the cluster of people who live alone and people who live with someone else. We named João the cluster 1, Model Family 1 the cluster 2, Model Family 2, the cluster 3 and Maria the cluster 4.

Table 3 – Sociodemographic characteristics and dimensions of the human-animal relationship between the clusters.

Characteristics Vs Cluster	João	Model Family 1	Model Family 2	Maria
Gender	Masculine	-	-	Female
Marital Status	Single	Family	Family	Single
How many people live in the household	Alone	Up to 6 people	Up to 6 people	Up to 6 people
Education	Complete High School	Complete High School	Complete High School	Complete High School
Income	Up to 1 minimum wage	Between 1 and 3 minimum wages	Between 1 and 3 minimum wages	Between 1 and 3 minimum wages
Pet	Dog	Dog	Dog	Dog
How do you like to be called	Owner	Owner	Father/Mother	Mother
Acquisition	Apotion	Apotion	Apotion	Apotion
Average monthly spending	Between BRL $101 and BRL $300	Between BRL $101 and BRL $300	Between BRL $101 and BRL $300	Between BRL $101 and BRL $300
Do you have a pet health plan?	No	No	No	No
1st human-animal dimension	Pet-Oriented Lifestyle	Pet-Oriented Lifestyle	Pet-Oriented Lifestyle	Pet-Oriented Lifestyle
2nd human-animal dimension	Structure and Discipline - Utility Oriented	Anthropomorphism	Anthropomorphism	Anthropomorphism

Source: the author (2024)

5. Conclusions

This study aimed to identify the dimensions that most explain the human-animal relationship in Brazilian homes. To this end, a survey was conducted throughout the national territory, on a sample of 690 people. As a result, four clusters stood out, with cluster 1 standing out for being predominantly male and cluster 4 for being predominantly female, both standing out for being mostly made up of people who live alone. Clusters 2 and 3 were made up of families with up to six people. In all clusters, the human-animal dimension “Pet-oriented lifestyle” was the one that most explained the human-animal relationship.

When analyzed the second human-animal dimension, in cluster 1, the dimension that was most manifested was “Structure and Discipline”, while all other clusters were explained by the construct “Anthropomorphism”. Although clusters 2, 3 and 4 have the second highest frequency of the human-animal dimension in anthropomorphism, which is characterized by treating animals as people, cluster 1 was the one that, in percentage terms, presented a greater relationship between income and spending on pets, compared to the other clusters. Interestingly, respondents from cluster 1 also expressed a greater preference for being called the pet's owner, while clusters 3 and 4 preferred to be called father or mother and pet.

In general, the study concludes that there are no considerable behavioral differences in the human-animal relationship between the cluster of people who live alone, when compared to different household arrangements. However, the study manages to point out that people who live alone tend to spend more on their pets than on different domestic arrangements. It is notable that none of the clusters had a health plan for pets, and there was a high score on the items: “I have already been financially strapped due to some treatment for my pet” and “I always spend more than planned when I go in some store to buy my pet’s basic items.”

It is interesting to highlight that the same people who score high in the statements above also say that “I have my pet’s costs well planned”. This suggests that, despite having the pet's costs planned, the purchase of pet products involves an emotional sphere, so that the pet owner always spends more than planned. These are substantial contributions to the entire pet industry and are indicative of how passionate and emotional a pet owner's purchasing process is at a pet store.

This work advances substantially in the problematization of the human-animal relationship, demonstrating quantitatively which dimensions most explain the human-animal relationship both in single-person homes and in different household arrangements. However, its greatest theoretical contribution is in relation to the method that was applied in this work, which consisted of validating and adapting three psychographic scales, which measure the dimensions of the human-animal relationship (Dotson; Hyatt, 2008; Boya et al., 2012 ; Chen et al., 2012), for the Brazilian market.

As a result, it was found that, once adapted, the scales were in line with the local reality. All constructs and the items that comprised them were understood by the interviewees. The dimensions had all the items that constituted their respective constructs understood and assimilated by dog and cat owners, with no adjustments being necessary in the original survey.

As a managerial contribution, one of the most important findings of this study, is to demonstrate how pet consumption is undersized in families' budgets, as the study manages to highlight, through pet owners' own statements, that they have already found themselves in situations of financial stress because of your pet.

Other managerial contribution of this study is to show the space that the pet industry has to work on a better value proposition for its products and services, especially health plans for pets, loyalty programs, which encourage the accumulation of points when purchasing of products or services, creation of marketplace applications, among others. The study also notes that there is room for better positioning of pet products and services, in order to help pet owners better estimate and organize their expenses.

It is recommended, for future studies, to delve deeper into the extent of validity of these scales, and test them with other pet owners, such as owners of birds, fish, hamsters, among others. Another suggestion for a future agenda would be to consider the different actors in the pet industry, given that this study was focused on the demand point of view. It would be interesting to understand how the supply side is organizing, as well as their marketing strategies for the different market segments of pet owners.

References

AMERICAN VETERINARY MEDICAL ASSOCIATION - U.S. Pet Ownership and Demographics Sourcebook. **Schaumburg, IL: American Veterinary Medical Association**; 2002.

BELK, Russell W. Metaphoric relationships with pets. **Society & Animals**, v. 4, n. 2, p. 121-145, 1996.

BOYA, Unal O.; DOTSON, Michael J.; HYATT, Eva M. Dimensions of the dog–human relationship: A segmentation approach. **Journal of Targeting, Measurement and Analysis for Marketing**, v. 20, p. 133-143, 2012.

CHEN, Annie; HUNG, Kuang-peng; PENG, Norman. A cluster analysis examination of pet owners' consumption values and behavior–segmenting owners strategically. **Journal of Targeting, Measurement and Analysis for Marketing**, v. 20, p. 117-132, 2012.

DOTSON, Michael J.; HYATT, Eva M. Understanding dog–human companionship. **Journal of Business Research**, v. 61, n. 5, p. 457-466, 2008.

DOTSON, Michael J.; HYATT, Eva M. Does your dog sleep on the bed? An exploratory study of dog-related consumer behavior. In: **Society for Marketing Advances Proceedings**, 2003.

HAIR, J. F., BLACK, W. C., BABIN, B. J., ANDERSON, R. E., & TATHAM, R. L. (2009). *Análise multivariada de dados*. Bookman editora

HEALTH FOR ANIMALS. Global Pet Health Report 2022. Disponível em: https://www.healthforanimals.org/wp-content/uploads/2022/04/Global-State-of-Pet-Health-Draft.pdf. Acesso dia: 22/11/2023.

HIRSCHMAN, Elizabeth C. Consumers, and their animal companions. **Journal of consumer research**, v. 20, n. 4, p. 616-632, 1994.

HOLBROOK, Morris B. et al. A collective stereographic photo essay on key aspects of animal companionship: the truth about dogs and cats. **Academy of Marketing Science Review**, v. 1, n. 1, p. 1-16, 2001.

SUSSMAN, Marvin B. ***PETS AND THE FAMILY***. Publisher: Haworth Press, New York. Publication Date: *1985*

The Impact of AI-Mediated Anti-Scamming Revenge Actions on Organizational Reputation: The Moderating Roles of Perceived Ethicality and Moral Credit

Oluwatobi Ogunmoku

Emmy Yeung

Introduction

Artificial Intelligence (AI) has become a cornerstone in combating various forms of online fraud and scams, with many organizations employing AI-driven solutions to mitigate risks associated with fraudulent activities. While AI's role in detecting and preventing scams has been documented (Baweja et al. 2023; Johora et al. 2024), the ethical implications of AI-driven actions, especially those involving revenge-oriented responses to scammers, remain largely unexplored. This paper investigates the impact of AI-mediated anti-scamming revenge actions (versus AI-mediated anti-scamming non-revenge actions) on organizational reputation, while exploring the roles of perceived ethicality and organizational moral credit as potential contingent factors. To illustrate AI-mediated anti-scamming revenge actions, consider an online retail company whose customer are frequently targeted by phishing scams. In the revenge condition, the company's AI system not only detects scammers but also engages them in prolonged deceptive exchanges, dissipating their time and resources to hinder further fraud attempts. Additionally, the AI gathers as much information as possible about the scammers and publicly exposes their personal identities on social media and scam-warning websites. In contrast, in the non-revenge condition, the AI system focuses solely on prevention and protection without retaliation. It detects and blocks phishing attempts, alerts customers in real-time about potential scams, and enhances transaction security through authentication measures. While both AI approaches aim to combat fraud, the revenge approach seeks to punish scammers, whereas the non-revenge approach prioritizes neutralising threats without escalation.

Stakeholders including customers, employees, and regulators, are increasingly concerned about the fairness, accountability, and proportionality of AI-driven decisions (Mittelstadt et al. 2016). Retaliatory actions, even when automated, may be perceived as overly punitive or ethically questionable, potentially undermining trust and damaging organizational reputation. Furthermore, the reputational impact of such actions may vary

depending on the organization's moral credit, which can serve as a buffer against reputational harm (Brown et al. 2016).

This study is situated at the intersection of organizational reputation, ethical decision-making, and AI ethics, addressing a critical gap in the literature by examining how AI-mediated revenge actions influence stakeholder perceptions and organizational outcomes. While prior research has explored the reputational consequences of organizational actions (Bustos 2021) and the ethical challenges of AI deployment (Eitel-Porter 2021), limited studies have investigated the interplay between these domains in the context of AI-mediated retaliation. This research seeks to fill this gap by providing empirical evidence on the reputational risks and ethical trade-offs associated with AI-mediated revenge actions.

Theoretical Framework

The study is grounded in Social Cognitive Theory (SCT) (Bandura, 1986), which emphasizes the interplay between personal factors, environmental influences, and behaviours. SCT is particularly relevant because it allows us to examine how stakeholders' perceptions of ethicality (a personal factor) and the organization's moral credit (an environmental factor) interact to shape the impact of AI-mediated revenge actions on organizational reputation.

Hypotheses

1. **Hypothesis 1:** AI-mediated anti-scamming revenge actions will have a different impact on organizational reputation compared to AI-mediated anti-scamming non-revenge actions. Specifically, we hypothesize that revenge actions will be perceived as more aggressive and potentially unethical, leading to a more negative impact on reputation.
2. **Hypothesis 2:** The impact of AI-mediated anti-scamming revenge actions on organizational reputation will be moderated by the perceived ethicality of the action. Stakeholders are likely to view revenge actions as less ethical due to concerns about fairness, proportionality, and the potential for misuse of AI.
3. **Hypothesis 3:** The organization's moral credit will moderate the relationship between AI-mediated anti-scamming revenge actions and organizational reputation.

Organizations with high moral credit may be given the benefit of the doubt, mitigating the negative impact on reputation.

Methodology, data collection and analysis

The study employs a 2 × 2 between-subjects quasi-experimental design, where participants are randomly assigned to one of four conditions based on two independent variables: AI-mediated anti-scamming action (revenge vs. non-revenge), moral credit (high vs. low). The AI-mediated anti-scamming action manipulation involves scenario-based vignettes that describe how an online retail giant responds to scammers—either through active retaliation (revenge condition) or preventive protection (non-revenge condition). The moral credit manipulation is operationalised through a pre-experimental organisational background description, where participants are informed about the company's prior ethical behaviour. In the high moral credit condition, the company is portrayed as having a strong history of corporate social responsibility, ethical labour practices, and consumer trust. In the low moral credit condition, the company is described as having prior controversies related to unethical practices and consumer distrust. The respondents perceived ethicality of AI-mediated anti-scamming actions is measured using a perceived ethicality scale. Each participant is randomly assigned to one of the conditions and presented with a vignette followed by a structured survey instrument. Additionally, manipulation checks are included to ensure participants correctly perceive the intended experimental conditions. A sample of 230 participants is recruited via online survey panels.

Results, Discussion and Implications

Following the analysis, for the first hypotheses we found that AI-mediated anti-scamming revenge actions have a significantly more negative impact on organizational reputation compared to non-revenge actions ($F(1, 228) = 12.45$, $p < 0.001$). This suggests that stakeholders perceive revenge actions as more aggressive and potentially unethical. For the second hypotheses, the perceived ethicality of the action moderates the relationship between AI-mediated revenge actions and organizational reputation ($F(1, 228) = 8.67$, $p < 0.01$). Lower perceived ethicality exacerbates the negative impact on reputation. Finally, for the third

hypotheses, the organization's moral credit moderates the relationship between AI-mediated revenge actions and organizational reputation ($F(1, 228) = 5.89$, $p < 0.05$).

Organizations with high moral credit experience a less negative impact on reputation.

The findings from the quasi-experiment suggest that while AI-mediated anti-scamming revenge actions can be effective in combating scams, they carry reputational risks due to ethical concerns. Stakeholders are particularly sensitive to the perceived ethicality of the use of AI, which can significantly influence their perceptions of the organization corroborating Figueroa-Armijos et al. (2023). The moderating role of moral credit highlights the importance of building and maintaining a strong ethical track record, which can mitigate the negative impact of potentially controversial actions expanding the thought of Rozeboom (2024). This research has important implications for both theory and practice. Theoretically, it contributes to the literature on organizational reputation, ethical decision-making, and the societal impact of AI. It also contributes to the discourse on organizational reputation by identifying moral credit as a key moderating factor in the relationship between controversial AI-mediated actions and reputation. Organizations with a history of ethical behaviours are better positioned to withstand reputational risks associated with AI-mediated revenge actions, suggesting that moral credit serves as a form of ethical capital expanding on Sun and Huang (2022).

Conclusion

As AI technology and its use continues to evolve, this study contributes to the growing body of literature on AI ethics by examining the reputational consequences of AI-mediated actions that involve moral and ethical trade-off. Practically, it provides guidance for organizations on the ethical use of AI in combating scams and the importance of maintaining moral credit.

References

Bandura, A. (1986). *Social Foundations of Thought and Action: A Social Cognitive Theory*. Englewood Cliffs, NJ: Prentice-Hall.

Baweja, P. S. S., Sangpetch, O., and Sangpetch, A. (2023). AI For Fraud Awareness. *arXiv preprint arXiv:2308.11032*.

Brown, J. A., Buchholtz, A. K., and Dunn, P. (2016). Moral salience and the role of goodwill in firm-stakeholder trust repair. *Business Ethics Quarterly*, *26*(2), 181-199.

Bustos, E. O. (2021). Organizational reputation in the public administration: A systematic literature review. *Public Administration Review*, *81*(4), 731-751.

Eitel-Porter, R. (2021). Beyond the promise: implementing ethical AI. *AI and Ethics*, *1*(1), 73-80.

Figueroa-Armijos, M., Clark, B. B., and da Motta Veiga, S. P. (2023). Ethical perceptions of AI in hiring and organizational trust: The role of performance expectancy and social influence. *Journal of Business Ethics*, *186*(1), 179-197.

Johora, F. T., Hasan, R., Farabi, S. F., Alam, M. Z., Sarkar, M. I., and Al Mahmud, M. A. (2024, June). AI Advances: Enhancing Banking Security with Fraud Detection. In *2024 First International Conference on Technological Innovations and Advance Computing (TIACOMP)* (pp. 289-294). IEEE.

Mittelstadt, B. D., Allo, P., Taddeo, M., Wachter, S., and Floridi, L. (2016). The ethics of algorithms: Mapping the debate. *Big Data and Society*, *3*(2), 2053951716679679.

Rozeboom, G. J. (2024). Corporate Moral Credit. *Business Ethics Quarterly*, *34*(2), 303-330.

Sun, M. and Huang, M. C. (2022). Does CSR reputation mitigate the impact of corporate social irresponsibility? *Asian Business and Management*, *21*(2), 261-285.

The Impact of Corporate Sacrifice on Perceived Moral Authority and Authenticity in Brand Activism

Lucia Barros

Cristiane Pizzutti

Nathalia Mello

Giuliana Isabella

Paulo de Paula Baptista

Marcos Severo de Almeida

After suffering a strong consumer boycott for collaborating with a transgender influencer on a social media promotional post, InBev put the managers in charge of the Bud Light campaign on leave (Liaukonyte, Tuchman, and Zhu 2024). This is a recent example of a brand that stepped back in its activist communications after losing customers. Indeed, brand activism can harm shareholder wealth since investors evaluate it as a signal of a firm's allocation of resources away from profit-oriented objectives (Bhagwat et al. 2020).

Since it involves controversial stances, it can lead to consumer boycotts, negative word-of-mouth, or even more aggressive actions (Hydocok, Paharia, and Blair 2020). This can reduce sales (Hydocok, Paharia, and Blair 2020) and stock prices (Villagra, Monfort, and Méndez-Suárez 2021). Since authenticity is a central characteristic of activist brands (Vredenburg et al. 2020), a fundamental question arises: do consumers perceive companies willing to sacrifice sales and profits as having greater moral authority to advocate for socio-political causes?

Moral authority – the capability of an entity to influence the morality of other stakeholders through power and platform – is an important characteristic of a company that hopes to promote societal change (Hoppner and Vadakkepatt 2019). We propose that consumers perceive sacrifice as a condition of authenticity, which drives a company's moral authority to advocate for a socio-political stance. We investigated this question in a series of two experiments.

Study 1 adopted a single-factor (high sacrifice vs. low sacrifice vs. control) between-subjects design. We recruited 295 North American adults (*M*age= 41.24, *SD* =14.53; 46.8% female) from Prolific. Participants read a text in the form of news in which a company was described as supporting the LGBTQIA+ cause. The high sacrifice condition said that the

company was willing to sacrifice customers for the cause; the low sacrifice condition said that the company was reluctant to sacrifice customers for the cause; and the control condition said that we still need an answer to whether the company was willing to sacrifice customers for the cause. After reading the manipulation, participants answered a questionnaire that contained measures of moral authority, authenticity, sacrifice (manipulation check), and demographics (which included political orientation).

An ANOVA revealed a main effect of sacrifice on moral authority (F (2, 292) = 13.49, p < .001, η^2 = .08). When a company is reluctant to sacrifice its sales, it is perceived as having less moral authority than when it is willing to sacrifice them (Mlow=3.62, SD=1.64 vs. Mhigh=4.70, SD=1.59; p < .001), or than when its willingness to sacrifice is unclear (Mlow = 3.62, SD = 1.64 vs. Mcontrol= 4.44, SD=1.28; p<.001). Interestingly, if its willingness to sacrifice is unclear, consumers attribute to the company the same level of moral authority as a company that is clearly willing to sacrifice its sales (Mhigh= 4.70, SD=1.59; Mcontrol= 4.44, SD=1.28; p<.44). This finding suggests that when the message is ambiguous, consumers expect the company to sacrifice for the cause.

We also found a main effect of sacrifice on authenticity (F (2, 292) = 61.86, p<.001, η^2 =.30). Participants perceived the company in the high sacrifice condition as more authentic (Mhigh= 5.79, SD= 1.35) than the control condition (Mcontrol=4.90, SD=1.53) and the low sacrifice condition (Mlow=3.38, SD=1.67; all pairwise comparisons: p< .001).

We then used a bootstrapping approach with 5,000 redraws in PROCESS Model 7 (Hayes 2013). In the model, sacrifice (control=1; high=2; low=3) was entered as a multicategorical predictor, authenticity as the mediator, political orientation (ranging from 0 = extremely liberal to 100 = extremely conservative) as the moderator, and moral authority as the dependent variable. For all participants, high sacrifice (vs. control) improves moral authority mediated by authenticity. However, for liberals and centrists, low sacrifice compared to control negatively affects authenticity, which in turn harms moral authority**.** This suggests that insufficient sacrifice is seen as less authentic, thus reducing perceived moral authority in these groups. For conservatives, low sacrifice does not significantly harm moral authority via authenticity, as evidenced by the confidence interval crossing zero (suggesting no significant negative impact).

Study 2 adopted a three (high sacrifice vs. low sacrifice vs. control) by two (cause:

conservative vs. liberal) between-subjects design. We recruited 336 Brazilian students (*M*age=22.27, *SD*=6.83; 43.8% female). The procedure was like Study 1, except for the following difference: in the conservative condition, the company was against a law that permitted abortion, while in the liberal condition, the company was in favor of it.

Once again, An ANOVA revealed a main effect of sacrifice on moral authority (F (2, 331)=44.03, p<.001, η^2=.21), so that low sacrifice leads to less moral authority than the control or high sacrifice conditions (M_{low}= 3.51, SD = 1.21; $M_{control}$= 4.55, SD=1.18, p<.001), while there is no difference between high sacrifice and control (M_{high}= 4.86, SD=1.03; $M_{control}$ = 4.55, SD = 1.18, p = .12). We also found a main effect of cause on moral authority, so that a liberal cause leads to more moral authority than a conservative one ($M_{liberal}$= 4.50, SD=1.29; $M_{conservative}$= 4.12, SD=1.24, F (2, 331) = 8.68, p=.003, η^2=.03). Sacrifice did not interact with cause (F(2, 331) = 2.10, p=.12, η^2=.01).

We found a main effect on authenticity so that participants perceived the company in the high sacrifice condition as more authentic (M_{high}= 5.41, SD=1.18) than the control ($M_{control}$= 4.76, SD=1.42) and the low sacrifice conditions (M_{low}= 3.15, SD=1.52; all pairwise comparisons: p<.001). Notably, the moderated mediation analysis reinforced the findings from the previous study, further validating the relationship between perceived sacrifice, authenticity, and subsequent outcomes.

These results suggest that sacrifice increases perceptions of authenticity and a company's moral authority. The strength of these relationships depends on political orientation and their affinity with the political spectrum of the supported stance: conservative or liberal. This research is the first to explore the beneficial effects of corporate sacrifice in the context of corporate activism. These results add to the literature on corporate activism by highlighting how authenticity and moral authority are not only shaped by a company's actions but also by the ideological alignment of its audience, emphasizing the nuanced role of political orientation in shaping consumer perceptions.

Are companies willing to sacrifice profit when engaging in corporate activism? Instead of offering straightforward managerial implications, these results are provocative. If companies want to look authentic, they should consider that consumers expect more than beautiful messages.

References

Bhagwat, Y., Warren, N. L., Beck, J. T., & Watson IV, G. F. (2020). Corporate sociopolitical activism and firm value. *Journal of Marketing,* 84(5), 1-21.

Hayes, A. F. (2013). *Introduction to mediation, moderation, and conditional process analysis: A regression-based approach.* The Guilford Press.

Hydock, C., Paharia, N., & Blair, S. (2020). Should your brand pick a side? How market share determines the impact of corporate political advocacy. *Journal of Marketing Research,* 57(6), 1135-1151.

Hoppner, J. J., & Vadakkepatt, G. G. (2019). Examining moral authority in the marketplace: A conceptualization and framework. *Journal of Business Research*, 95, 417-427.

Liaukonyte, J., Tuchman, A., & Zhu, X. (2024). Lessons from the Bud Light Boycott, One Year Later. *Harvard Business Review*, https://hbr.org/2024/03/lessons-from-the-bud-light-boycott-one-year-later.

Villagra, N., Monfort, A., & Méndez-Suárez, M. (2021). Firm value impact of corporate activism: Facebook and the stop hate for profit campaign. *Journal of Business Research*, 137, 319-326.

Vredenburg, J., Kapitan, S., Spry, A., & Kemper, J. A. (2020). Brands taking a stand: Authentic brand activism or woke washing? *Journal of Public Policy & Marketing*, 39(4), 444-460.

Towards Market Inclusion and Social Flourishing in Post-Alassad Syria

Forrest Watson

Gökçe Balaban

Ziad Alahmad

The sudden fall of the Alassad regime at the end of 2024 was a time of celebration of the hope of improved well-being for Syrians. Since the Syrian revolution erupted in 2011, of the 25 million population, perhaps 600,000 people have died and 13 million people displaced (Syriahr.com 2024). There is optimism of forced migrants returning to their homeland and rebuilding a better life. However, it is also a time of apprehension and uncertainty as to what will take its place. Can social conflict be reduced? Can different factions be unified under a stable government? Can a thriving market and society be resurrected where everyone can be a participant?

Macromarketing has a long history of analyzing how systemic coordination of markets, marketing, policies and consumption can help to end cycles of discord, conflict and violence (Barrios et al. 2016; Shultz et al. 2022). Macromarketing is concerned with the economic and social impact of the distribution of products and other resources through the marketing system (Ferrell and Ferrell 2008). The well-being consequences for all stakeholders is of paramount importance. A thriving and inclusive marketing system is one of the needs after Syria's years of division and inequality.

When powerful stakeholders seek to optimize exclusionary outcomes, the marketing system can fail to function for the flourising of all (Shultz and Peterson 2019). "Favoritism in decisions of government officials" where favoritism is shown to well-connected firms and individuals when deciding upon policies and contracts is identified as one of the factors in the Global Competitiveness Index (Ekici and Ekici 2015; Sala-i Martin et al. 2012). Stakeholder inclusion and equitable access to resources have been identified as crucial elements for sustainable and inclusive development in the region (DeQuero-Navarro et al. 2020). Macromarketers have shown the need for multi-win goals, systemic understanding, stakeholder inclusion, and marketing via cooperation and constructive engagement (Shultz and Peterson 2019). We study these factors in contemporary Syria, from the time of Bashar Alassad coming to power in 2000 through his fall in December 2024.

Macromarketers have long referred to the importance of the Greek *agora* as a literal and symbolic open square in which people could assemble and participate in interdependent

civil and commercial life (Mittelstaedt et al. 2006). Society, markets, and marketing can only be understood properly in relationship to one another. Indeed, the *souks* in Damascus and Aleppo have a long history at the center of Syrian society and human civilization. Aleppo was known as a center of trade hub since 3rd millennium BC (Encyclopedia Britannica, 2025). Similarly, Damascus was located on the *Hajj* road to Makkah and had a vital trade role during the Islamic era (UNESCO). However, under Alassad, the country failed to have an open, integrated market and worked rather for the interests of certain groups and individuals. As one Syrian was quoted as saying that under the Alassad regime, "The public spaces — we stopped going to them because we felt they weren't for us, they were for the regime" (New York Times, 1/5/2025). For too long too many people have felt excluded from the agora. How can an inclusive agora be reopened and reinvigorated?

The Syrian case is an example of how the lack of egalitarian development and market practices, including resource scarcity and the inequality in distribution of those resources played a significant role in the emergence of the conflict. Some social groups were excluded from resources under the Alassad regime. While there is a moment of hope, it is important that the resources not be hoarded by the new social group in power lest the same seeds of social conflict be sown again.

This study aims to understand the recent history of marketplace exclusion and inequality in Syria and how it has exacerbated social conflict and eventually a war. It traces the growth of inequality during the Alassad regime. It also considers examples of how Syrians are currently experiencing freedom through marketplace participation after the fall of the Alassad regime, along with the tensions. The study explores principles, beginning with multi-win goals, systemic understanding, stakeholder inclusion, and marketing via cooperation and constructive engagement (Shultz and Peterson 2019), which may enable Syria to build a thriving agora that supports a stable and inclusive society that support well-being for all stakeholders. Based on this, the research questions are as follows: How has multi-layer favoritism contributed to economic disparities, social conflict and eventually the fall of the Alassad regime? How can application of distributive justice, stakeholder inclusion, and other macromarketing principles contribute to a more economically equitable and flourishing Syria?

The sections that follow provide a concise history of the economic favoritism that led to the demise of the Alassad regime, highlights of the second-hand accounts about the opening market and access to resources during the political transition, and the research

agenda to build on macromarketing principles to make recommendations for a more stable and prosperous Syria.

History of Economic Favoritism Under Alassad

The Syrian constitution of 1969, which was established at the beginning of Albaath domination, stated that the economy of Syria is based on the idea of "socialism" and was always used by the political party until it was replaced in 2012's constitution by the term "national economy". In practice, no major economic reforms or "socialism" acts were done during the period of Hafez Alassad who came to power in 1971, and the real socialist reforms were done between 1963 and 1970 such as Nationalization and agrarian reform, social security, free health and education services, and expansion of the public productive sector (Almuugharbel et al. 2024). Although Hafez Alassad was using the title of "socialism" he was closer to liberalism by supporting elites or "bourgeoisie" in big cities which led to wealth accumulation by people close to his regime (Daher 2023), and he showed more openness to the private sector in the late 1970s to keep them on his side with his fight against the Muslim Brotherhood (Almuugharbel et al. 2024). The economy and the resources during Hafez Alassad were divided into four groups: Public ownership (Public production factories and institutions like: rice and cotton factories) managed by Alassad's close circle, Alassad family assets (everything natural including oil), people's shared ownership (Services institutions like schools and hospitals managed by regime loyalties), and other private sector companies and investments which was monitored and supervised by the regime (Almuugharbel et al. 2024).

When Bashar Alassad, son of Hafez, came to power, he inherited this patronage system. Both depended on favoritism and structured inequality to maintain their control. However, this is not to say that everything remained the same. Bashar Alassad transformed the economic system from "state-controlled" to a more open "social-market" one. While doing that, he reconfigured the critical patronage networks, which meant the transfer of resources to the regime and people close to regime. As a result, inequalities increased, and the redistributive capacity of the state declined (Donati 2013, p. 36).

Economic inequalities during this period in Syria, can thus be linked to economic favoritism. Economic favoritism refers to instances where certain groups, mainly close to regime circles, had disproportionate access to market opportunities compared to other groups. The groups that benefited from the Basahr Alassad regime were: traditional elites

(mainly from big urban cities like Aleppo and Damascus), regime-linked businessmen (Alassad's family members, and the sons of highly ranked officers), and war profiters after the start of the war (involved in black market and illicit businesses such as drugs and arms) (Turkawi 2021). Some well known examples of those who profited from the favoritism practices are mobile phone provider "Syriatel" owned by Bashar's cousin, and the main mobile phones importer in Syria owned by Bashar's wife. While these groups were taking the advantage of clientalist networks, some other groups were being excluded from state's wealth. Hence, this type of favoritism exacerbated inequalities, contributed to regional disparities, and disadvantaged some groups.

As the time passed, those clientelist networks eventually led to conflicts of interest between those who benefited from state resources and those who were excluded. Rural workers, for instance, were among the most disadvantaged due to the privatization of land and the rise of a wealthy entrepreneurial class in rural areas. This form of privatization, which favored certain groups over others, deepened the divide between the upper-middle class and the lower-middle class (Donati 2013, p. 53). These policies of favoritism also exacerbated regional disparities. The World Bank Report (2024) analyzed the welfare of Syrian households both before and after the war. In 2009, just before the outbreak of war, the poverty rate was highest in Idlib, followed by Deir-ez-Zor in the east and Al-Raqqah in the northeast (regions discluded by Alassad), whereas there was the least poverty in the Alassad-supported Latakia and Tartous regions. Regime favoritism likely contributed to uneven infrastructural and economic investments in the region, which may have exacerbated economic disparities across Syria.

Regional disparities in Syria also stem from the unequal distribution of wealth between urban and rural populations. According to a United Nations Development Programme (UNDP) report (El-Laithy and Abu-Ismail 2005, p. 3), 58.1% of Syria's poor resided in the rural North-Eastern regions, compared to 38.8% in urban areas. Similarly, economic growth between 1996 and 2004 was not uniformly distributed. Rural areas in the North-Eastern and Coastal regions experienced a decline in average per capita expenditures, despite an overall annual increase of 1.99% in the country's real average per capita expenditure (El-Laithy and Abu-Ismail, 2005). I"n the rural North-Eastern region, the percentage of people living under one dollar per day is more than tenfold that in the urban area. Likewise, extreme poverty in the North-Eastern

region is more than quadruple that of the Coastal region" (El-Laithy and Abu-Ismail, 2005, p. 17).

Although poverty decreased overall between 1996–1997 and 2003–2004, it increased in the rural areas of the North-Eastern and Coastal regions (Abu-Ismail et al. 2011). Data from 2007 supports this trend, showing that the rise in overall poverty was more pronounced in rural areas compared to urban ones, reflecting the heightened vulnerability of rural populations to economic and structural challenges (Abu-Ismail et al. 2011). Furthermore, the same data reveals that poverty remained heavily concentrated in the North-Eastern region, particularly in rural areas (Abu-Ismail et al., 2011: 8).

In sum, while Syria became wealthier between 2000 and 2010, with an average annual GDP growth of 4.3% driven by market developments in non-oil sectors (World Bank Report, 2024), the benefits of this growth were not evenly distributed. Economic growth doesn't alone result in a sustainable and inclusive society (DeQuero-Navarro et al. 2020). Groups aligned with the ruling family disproportionately benefited from market gains, while wealth failed to reach certain regions, especially rural areas in the North-East. This inequality is reflected in the Gini coefficient, which rose from 32.6% in 1997 to 37.5% in 2004, before slightly declining to 34.2% in 2007 (Abu-Ismail et al. 2011).

Post-Alassad Economic Freedoms

This research also aims to collect and analyze second-hand accounts of Syrians found in traditional and social media in order to gain insights on the economic transition. These provide insight into the marketplace exclusion and disfunction during the Alassad regime and the opening agora. These are a sample of the types of accounts that will be reviewed.

An interview with Sami, the owner of a computer and videogame shop, reflected back on his experience before the transition of the regime:

"In 2021 the security forces came to my shop and claimed that I use foreign currencies other than Syrian Lira, ... All my products are imported, it is normal that I have to use US dollars ... 8 security officers and two staff from the central bank entered the shop, took our IDs and phones ... they checked the cash and they found around 4 million Syrian lira ($1000 at that time), they said to us: you work in currency exchange ... they arrested me and other staff at the shop and took us to the security center ... they said one or two days and then you will be released (laughing) ... we stayed there 57 days and we had to pay (bribe) around $20,000 to

be released .... and they did not accept the bribe in another currency, they accepted dollars only! ... It was not only me, the ones I know from my area were 8 shops, they took us all at the same time ... in addition, other times they were coming for taking bribe - one day it was $5000 – and then they leave ... another day they came to the area and they arrested the owners of 11 shops, ... like this ... now [after the fall of Alassad] we go to the shop and we feel mentally better .... until now there are no clear regulations and policies but we have hope and we are optimistic ... if there is a clear tax to pay I will definitely pay it – happily" (Diala and Waref Channel, 1/10/2025). Sami describes the relief of having clear regulations and policies and not living in the uncertainty of arrests and bribes when unprotected from the Alassad regime. This experience demonstrates the absence of distributive justice and its principles of legitimacy and fairness (Ferrell and Ferrell 2008).

Another shop owner, Hussam, told of being fined and sentenced to a month in jail for selling six Kinder chocolate eggs, a forbidden foreign brand. The shelves of the corner store are now free to carry diverse brands. Marketplace openness exemplifies freedom for Syrians who were long under strict controls, such as bans of foreign- currency exchanges. "Even the utterance of the word 'dollar' could land someone in prison under Mr. Alassad. Foreign-currency exchanges, which were banned for years under the Assad regime, have sprung up seemingly everywhere. Men walk through markets yelling: 'Exchange! Exchange!' A seller hawking warm winter porridge offered stacks of Syrian pounds in exchange for crisp $100 bills." (NY Times 1/5/2025).

Adnan, a Christian clothing shop owner in a Christian area in Damascus, described his experienced of the transition in this way: "I'm 28 years old and this is the first time in my life that I feel like I'm self-employed…We were only allowed to buy from them, and we only got a dollar or two of profit…It was a mafia, and we dealt with them as such: You're either with them or you pay them...Before, we were weak and only the strong belonged to the system. Now we are all equal" (Akhbar Alaan 1/10/2025). Adnan's experience shows the difficulty for those excluded from economic favoritism and newfound equality. It also demonstrates the disparity between the weak and strong rather than stakeholder inclusion (Shultz and Peterson 2019),

Duried Durgham, a former governor of the Syrian central bank, said it an interview about the transition government "at least the current management of Syria allows the people to speak up, and discuss .. which is brilliant .... in the past the Syrian was able to open his

mouth to the dentist only ... at least now the doors are open for debate, discussion, and criticism, which is something good" (Hashtag 1/29/2025). This demonstrates movement toward a more open agora in which more people have a voice. Although there is much uncertainty, this is a step toward marketing via cooperation and constructive engagement (Shultz and Peterson 2019). The accounts of Syrians in the transforming marketplace provide fresh glimpses into the importance of an inclusive agora in which people can flourish.

Principles and Recommendations for an Inclusive Market

Building on the established factors of multi-win goals, systemic understanding, stakeholder inclusion, and marketing via cooperation and constructive engagement (Shultz and Peterson 2019), this research aims to make recommendations to support a thriving Syrian society and well-being for all. We intend to examine the economic model in place in Idlib, which was run by the party of interim president of Syria, Ahmed al-Sharaa, for insights about whether it is a model for greater inclusion. We hope that our research on Syria will be a timely contribution of ideas to decrease social conflict and lay the foundation for a flourishing society.

References

Abu-Ismail, Khalid, Abdel-Gadir, Ali, and El-Laithy, Heba (2011), Poverty and Inequality in Syria (1997–2007). Arab Development Challenges Report. New York: United Nations Development Programme (UNDP).

Akhbar Alaan, January 20, 2025. Translated from Arabic. "It was a mafia": Syrian traders hope to break free from corruption in the post-Assad era ["Kānat māfyā": Tujjār Sūriyā ya'mulūn al-takhalluṣ min quyūd al-fasād fī ḥiqbat mā baʿd al-Asad] https://www.akhbaralaan.net/news/special-reports/2025/01/10/ Accessed on 12 February, 2025.

Almuugharbel, Abdulaziz A., Masri, Mohammad S., and Alturkawi, Khaled (2024), "The Economy of the Syrian Regime: Approaches and Policies (1970–2024)" [Iqtisād al-Niẓām al-Sūrī: Al-Muqārabāt wa-Al-Siyāsāt 1970–2024], Jusoor for Studies.

Barrios, Andres, de Valck, Kristine, Shultz, Clifford, Sibai, Olivier, Husemann, Katharina, Maxwell-Smith, Matthew, and Luedicke, Marius (2016), "Marketing as a Means to

Transformative Social Conflict Resolution: Lessons from Transitioning War Economies and the Colombian Coffee Marketing System," Journal of Public Policy & Marketing, 35 (2), 185-197.

Donati, Caroline (2013). "The Economics of Authoritarian Upgrading in Syria: Liberalization and the Reconfiguration of Economic Networks." In Middle East Authoritarianisms: Governance, Contestation, and Regime Resilience in Syria and Iran, edited by Steven Heydemann and Reinoud Leenders, 35-61**.** Stanford, CA: Stanford University Press.

Daher, J. (2023). "Labor unions in Syria under the microscope: History, employment, and labor oppositions" [Al-ittiḥādāt al-ʿummāliyyah fī Sūriyā taḥt al-mijhar: Al-tārīkh, al-tawẓīf, al-muʿāraḍāt al-ʿummāliyyah]. Friedrich-Ebert-Stiftung.

DeQuero-Navarro, Beatriz, Barakat, Karine Aoun, Shultz, Clifford J., Araque-Padilla, Rafael A., and Montero-Simo, Maria Jose (2020), "From conflict to cooperation: A macromarketing view of sustainable and inclusive development in Lebanon and the Middle East," Environmental Management, 66, 232-247.

Diala and Waref Channel, 1/10/2025, Accesed on February 12, 2025. https://www.youtube.com/watch?v=f1LWX2kodx8&t=369s

Encyclopedia Britannica. "The Contemporary City." Last modified 05.01.2025. Accessed 12.02.2025. https://www.britannica.com/place/Aleppo/The-contemporary-city.

Ekici, Ahmet and Ekici, Sule Onsel (2016), "A Bayesian network analysis of ethical behavior," Journal of Macromarketing, 36 (1), 96-115.

El-Laithy, Heba, and Abu-Ismail, Khalid (2005), Poverty in Syria: 1996–2004 Diagnosis and Pro-Poor Policy Considerations. New York: United Nations Development Programme (UNDP).

Ferrell, O. C. and Ferrell, Linda (2008), "A macromarketing ethics framework: stakeholder orientation and distributive justice," Journal of Macromarketing, 28 (1), 24-32.

Hashtag, 1/29/2025, Accessed on February 12, 2025, Duraid Dargham: The dollar price may reach 5,000 Syrian pounds [Duraid Dargham: Qad yaṣil siʻr al-dūlār ilā 5 ālāf līrah Sūriyyah]. https://www.youtube.com/watch?v=l_HWF2kHv4Q&list=LL&index=15&t=598s

Mittelstaedt, John D., Kilbourne, William E., and Mittelstaedt, Robert A. (2006), "Macromarketing as agorology: Macromarketing theory and the study of the agora." Journal of Macromarketing, 26 (2), 131-142.

Sala-i Martin, Xavier, Bilbao-Osorio, Benat, Blanke, Jennifer, Crotti, Roberto, Geiger, Thierry, and Ko, Caroline (2012), "The Global Competitiveness Index 2012–2013:

Strengthening Recovery by Raising Productivity," (accessed on May 30, 2014), [available at http://www3.weforum.org/docs/CSI/2012-13/GCR_Chapter1.1_2012-13.pdf].

Shultz, Clifford, Hoek, Janet, Lee, Leonard, Leong, Way, Srinivasan, Raji, Viswanathan, Madhu, and Wertenbroch, Klaus (2022), "JPP&M's Global Perspective and Impact: An Agenda for Research on Marketing and Public Policy," Journal of Public Policy & Marketing, 41(1), 34–50

Shultz, Clifford J. and Peterson, Mark (2019), "A macromarketing view of sustainable development in Vietnam," Environmental management, 63 (4), 507-519.

Syriarhr.com, "Syrian Revolution 13 years on | Nearly 618,000 persons killed since the onset of the revolution in March 2011" (March 15, 2024) https://www.syriahr.com/en/328044/?doing_wp_cron=1738904885.9926760196685791015625

The New York Times (1/5/2025), "In Damascus, Syrians Reclaim Freedoms Off Limits Under al-Assad", Raja Abdulrahim, Accessed on Feburary 12, 2025, https://www.nytimes.com/2025/01/05/world/middleeast/damascus-syria-freedoms-al-assad.html?searchResultPosition=2

Turkawi, Khaled (2021), "Syria's wealthy in wartime" *[Athriyā' Sūriyā fī zaman al-ḥarb].* Jusoor for Studies.

UNESCO, "The Hajj Pilgrimage Routes: The Darb Zubaydah (Saudi Arabia)," Accessed on February 14, 2025, https://whc.unesco.org/en/tentativelists/6577/#

World Bank Report (2024), *The Welfare of Syrian Households After a Decade of Conflict*. Washington, DC: World Bank.

Travel Proud or Just Hotels? Examining the Destination-Level Impact of Inclusivity Badges

Mario D'Arco

Giovanni Baldi

Introduction

The increasing visibility of LGBTQIA+ rights has led many brands and destinations to integrate inclusivity into their marketing and competitive positioning strategies. While this trend suggests a commitment to diversity, it remains unclear whether corporate-driven inclusivity efforts generate substantive societal change or merely reflect market-driven commodification (Koch 2020; Cammarota et al. 2023).

One initiative that exemplifies this approach in tourism and hospitality is *Travel Proud* by Booking.com—a certification that designates accommodations as LGBTQIA+-friendly based on training and self-reporting. While this program aims to enhance perceptions of hotel inclusivity, it is unclear whether such branding efforts extend beyond individual accommodations to influence the destination's broader LGBTQIA+-friendly image. This study critically examines the effectiveness of Travel Proud badges in shaping perceptions of both hotels and destinations, contributing to ongoing macromarketing debates on the commodification of socio-political activism in tourism (Wulf et al. 2022).

Literature Background

The macromarketing perspective suggests that corporate activism in social issues, including LGBTQIA+ inclusivity, has transitioned from traditional cause marketing to a broader socio-political marketization of identity-based consumption (Bhagwat et al. 2020; Vredenburg et al. 2020; Koch and Ulver 2022).

In tourism, destination branding plays a crucial role in shaping consumer perceptions, particularly in terms of safety and inclusivity for marginalized travelers (Ram et al. 2019). Visual markers and digital trust signals, such as sustainability certifications or inclusivity badges, have been shown to influence consumer perceptions and decision-making (Assaker and O'Connor 2023). The *Travel Proud* badge, as a corporate-driven initiative, introduces a ***key research question***: *Can an accommodation-level certification influence perceptions of an entire destination's LGBTQIA+-friendliness?*

While LGBTQIA+ travelers increasingly seek brands that align with their identity and values (Seyfi et al. 2024), research on whether such hotel-specific certifications create a halo effect on broader destination image remains limited. This study aims to fill this gap by examining the effectiveness of Travel Proud badges in influencing LGBTQIA+ destination branding perceptions, providing empirical insights into whether inclusivity branding at the micro level (hotels) contributes to a macro shift in destination image.

Methodology

Grounded in a social constructivist epistemology, this research assumes that perceptions of LGBTQIA+ inclusivity are socially and discursively constructed through branding, corporate narratives, and consumer discourse (Berger and Luckmann, 1966). The study is informed by signaling theory (Spence 1974), which suggests that credibility and trust in a destination's LGBTQIA+-friendliness may be influenced by visible inclusivity cues, such as certification programs. Additionally, institutional theory (DiMaggio and Powell 1983) provides a framework to explore how market actors, such as Booking.com, institutionalize inclusivity norms through standardization and certification mechanisms.

To assess the effectiveness of Travel Proud badges in influencing perceptions of Rome's LGBTQIA+-friendly image, this study employs a mixed-methods approach, leveraging triangulation to ensure a comprehensive analysis of branding, consumer perception, and digital discourse. Italy was selected as the research setting due to its cultural and religious complexities surrounding LGBTQIA+ rights, while Rome serves as the focal case study given its status as a global tourist hub and a site of ongoing socio-political debates. Indeed, the study will be conducted in three phases:

First, a discourse analysis will examine how *Travel Proud* certification is framed within Booking.com's marketing materials, consumer reviews, and digital travel platforms. This qualitative analysis will assess the symbolic and narrative construction of inclusivity at both the accommodation and destination levels, exploring whether LGBTQIA+ inclusivity is presented as a substantive commitment or a marketized branding strategy.

Second, an experimental design will test the causal impact of the Travel Proud badge on consumer perceptions. In a between-subjects experiment, participants will be randomly exposed to advertisements for hotels in Rome, either with or without the Travel Proud badge. The study will measure how the presence of the badge influences perceptions of hotel

LGBTQIA+ inclusivity, perceptions of Rome as an LGBTQIA+-friendly destination, and booking intentions and risk perceptions.

Finally, a netnographic analysis will examine LGBTQIA+ travel discussions on forums and social media to assess whether Travel Proud certifications influence user-generated discourse on Rome's inclusivity. This phase will provide insights into how LGBTQIA+ travelers discuss and interpret inclusivity signals, particularly whether they perceive the badge as a trustworthy indicator of inclusivity or as a form of corporate tokenism.

Expected Findings and Future Research

This study anticipates that the *Travel Proud* badge will have a positive effect on perceptions of hotel inclusivity, reinforcing trust among LGBTQIA+ travelers. However, its influence on the broader LGBTQIA+-friendly image of Rome is expected to be weaker, suggesting that while certifications can enhance individual hotel branding, their macro-level impact on destination perception may remain limited. Additionally, consumer skepticism is likely to play a moderating role, as some travelers may perceive such certifications as mere "rainbow washing" rather than genuine indicators of inclusivity.

Future research should investigate the long-term impact of inclusivity certifications, exploring whether repeated exposure to *Travel Proud* badges fosters cumulative shifts in destination perception over time. Another important avenue of inquiry is the role of government policies in reinforcing or undermining corporate-driven inclusivity initiatives, as public policies may either complement or contradict private-sector branding efforts. Additionally, comparative analyses across different destinations would provide valuable insights into whether *Travel Proud* badges are more effective in shaping destination image in countries with mixed LGBTQIA+ rights records, such as Italy, versus destinations already perceived as highly inclusive.

References

Afshardoost, M. and Eshaghi, M. S. (2020), Destination image and tourist behavioural intentions: A meta-analysis. *Tourism management*, *81*, 104154.

Assaker, G. and O'Connor, P. (2023), The importance of green certification labels/badges in online hotel booking choice: A conjoint investigation of consumers' preferences pre- and post-COVID-19. *Cornell Hospitality Quarterly*, *64*(4), 401-414.

Berger, P. L. and Luckmann, T. (1966), The social construction of. *Reality: A Treatise in*.

Bhagwat, Y., Warren, N. L., Beck, J. T., and Watson IV, G. F. (2020). Corporate sociopolitical activism and firm value. *Journal of marketing*, *84*(5), 1-21.

Cammarota, A., D'Arco, M., Marino, V., and Resciniti, R. (2023), Brand activism: A literature review and future research agenda. *International Journal of Consumer Studies, 47(5)*, 1669-1691.

DiMaggio, P. J. and Powell, W. W. (1983), The iron cage revisited: Institutional isomorphism and collective rationality in organizational fields. *American sociological review*, *48*(2), 147-160.

Koch, C. (2020), The Political Consumer: Market Activism in the Neoliberal Era. *Marketing Theory, 20(1)*, 45-62.

Koch, C. and Ulver, S. (2022), Branding the Conflict: How Marketized Activism De-Politicizes Social Movements. *Journal of Macromarketing, 42(3)*, 321-338.

Ram, Y., Kama, A., Mizrachi, I., and Hall, C. M. (2019), The benefits of an LGBT-inclusive tourist destination. *Journal of Destination Marketing and Management*, 14, 100374.

Seyfi, S., Gorji, A. S., Kuhzady, S., Hall, C. M., and Senbeto, D. L. (2024), Dissecting destination boycotts: Unpacking ethical dilemmas in politicized tourism. *Journal of Destination Marketing and Management, 34*, 100950.

Spence, M. (1974), Competitive and optimal responses to signals: An analysis of efficiency and distribution. *Journal of Economic theory*, *7*(3), 296-332.

Vredenburg, J., Kapitan, S., Spry, A., and Kemper, J. (2020), Brands Taking a Stand: Authentic Brand Activism or Woke Washing? *Journal of Business Research, 116*, 384-392.

Wulf, T., Naderer, B., Olbermann, Z., and Hohner, J. (2022), Finding gold at the end of the rainbowflag? Claim vagueness and presence of emotional imagery as factors to perceive rainbowwashing. *International Journal of Advertising*, *41*(8), 1433–1453.

Unbolting consumer power: Bypassing tactics for reshaping markets

Karin Brondino-Pompeo

Isabela Carvalho de Morais

Abstract

This study explores how consumers resist corporate constraints embedded in product design by creatively bypassing Nespresso's closed system. Through tactical interventions, they reclaim agency, extend product lifecycles, and redistribute knowledge. These practices challenge firms' market power, reshape socio-material relations, and foster more sustainable and equitable market dynamics.

Keywords: market shaping, script, inscription, prescription, bypassing tactics

Introduction

Companies embed intended modes of use into consumer products through their materiality—what Akrich (1992) and Akrich and Latour (1992) call inscription. These inscriptions prescribe a certain way to use them—the prescription. In addition to directing how they will be consumed, it is not uncommon for companies to inscribe prohibitions and restrictions on possible interventions to be carried out by consumers or other actors. This is the case with the Nespresso coffee machine, whose screw heads for accessing the machine entrails are oval-shaped and nail-like. Until recently, no screwdriver was available on the market for opening them. Thus, a Nespresso coffee maker could only be opened by the technical assistance service managed by the company itself, even if the repair was simple and a reasonably handy consumer could do it themselves.

Nespresso is not an isolated example. Many firms introduce inbuilt obstacles to prevent unauthorized use or modification, aiming to 'protect' their products from users, forcing them to consume the product in a certain way. Consumers, however, do not necessarily passively accept these expressions of power on the part of companies. This raises critical questions: how do consumers bypass these power expressions inscripted into products, acting to shape the market? And, what are the broader implications of these practices for markets and society?

Knowledge and power can assume material forms (Law 1991)—on the one hand, product design and policies constraint consumer physical and consumption actions; on the

other hand, consumers deploy tactics (De Certeau 1984; Watson and Shove 2008), develop tools and methods and share their newly acquired knowledge, illustrating the dance of agency (Pickering 1995). Consumers can resist the market when caught in forces beyond their control and co-create power and knowledge (see Denegri-Knott, Zwick, and Schroeder 2006 for a review). Those actions reconfigure the actors' roles and relations, altering the market dynamics.

A growing body of literature has been dedicated to understanding the dynamics of actors in shaping markets (Brondino-Pompeo 2024; Giesler and Fischer 2017; Harrison and Kjellberg 2016; Nenonen, Ferrer, and Brodie 2021). This research stream recognizes the multidimensional character of markets, demonstrating how different agents dynamically shape and reconfigure them. Of particular interest here are the studies that highlight the role of consumers in the construction and reconfiguration of markets, composing a new socio-material framework. From them, we learned that consumers' innovation practices catalyze the formation of new markets when they find themselves unable to profit from the existing market offers (Diaz Ruiz and Makkar 2021; Martin and Schouten 2014; Morais, Brito, and Quintão 2019).

Building on these insights, we argue that companies embed scripted consumption pathways into their products—requiring consumers to follow predefined steps such as purchasing the machine, buying proprietary capsules, using pre-defined services, and adhering to planned obsolescence—thus creating structural barriers that limit consumer agency. However, consumers do not passively accept these constraints. Instead, they develop creative bypassing tactics to regain control over the object and their usage, challenging market dynamics. These acts of resistance challenge corporate authority, disrupt market dynamics, and carry broader implications: they expose tensions between corporate profit strategies and consumer autonomy, as well as pressing environmental concerns.

By circumventing restrictions and extending product lifecycles, consumers—often unintentionally—contribute more sustainable consumption practices, pushing back against the logic disposability and dependency. Understanding how consumers navigate and resist these constraints illuminates the markets' disruptions and points toward the possibility of more balanced, participatory, and sustainable market systems.

Theoretical background

Scripts, inscriptions, prescriptions, and conscriptions

Although humans tend to see themselves as protagonists in the relationship with consumer products (Sassatelli 2007), scholarship in different fields, such as science and technology studies, constructive market studies, and consumer culture theory, have shown us that objects also have agency. Akrich (1992), Latour (1992), and Akrich and Latour (1992) show that objects and devices shape and influence user behavior through the process of script, inscription, and prescription. Scripts are plans of action inscribed by engineers, designers, or manufacturers into objects, with instructions on how to use them. Each object embodies a prescription of certain routines to be accomplished, and each tool and rule is supposed to fulfill the work mission. So, objects are prescriptive and stimulate specific actions while making others more difficult to perform.

Designers and engineers shape objects also by inscribing their worldviews into the objects' scripts. These designed objects represent the designer's framing of concerns, thus defining a framework of action together with the actors and the space in which they are supposed to act; with these scenarios' inscription, they also inscribe types of users (Akrich 1992; Redström 2006, 2008). However, actual users may not bear close resemblance to the user-figure that was deployed in the design process, and the enactment of use often diverges in practice from the one envisioned during the artifact's development (Fuentes 2019; Ingram, Shove, and Watson 2007). So, although prescriptive, scripts are not deterministic: they must be translated by users, and "even the most prescribed artifacts remain open to resistance (or 'anti-programs') when exposed to the social realities of use and practice" (Ingram et al. 2007, p. 9). The consumption act emerges from the arrangement between the human and the material and technical devices, in "a continuous adjusting of these elements" (Hagberg 2016, p. 112). Sometimes, these arrangements fail. For example, some apps designed to intervene in shopping and enable smart, ethical consumption failed due to their design's immutable character, impairing them from fitting into some types of consumption assemblages (Fuentes 2019).

Any part of the assembly can also be the starting point of the breakdown (or, at least, be the starting point of the breakdown analysis). In the previous example, the technical device failed and menaced the endurance of the consumption arrangement. However, we also

understand that consumers can refuse to subscribe to what was once prescribed. In Akrich and Latour's (1992) terms, the existence of a setup, a socio-technical arrangement, depends on the conscription, or "the series of actors that have to be aligned for a setting to be kept in existence or that have to be aligned to prevent others from invading the setting and interrupting its existence" (p. 261). Hence, conscription breakdowns can lead to market disruptions (Nenonen and Storbacka 2020), resulting in market transformations.

Market shaping

Markets are complex and plastic systems created through the practices of embedded actors (Kjellberg, Azimont, and Reid 2015; Morais et al. 2019). Through the process of making markets, various actors shape new socio-material structures, and understanding this process requires recognizing the dynamics that continuously shape and reshape a market (Flaig, Kindström, and Ottosson 2021; Diaz Ruiz and Makkar 2021). Market shaping is an effort to change the current situation or drive a market toward specific interests (Hawa, Baker, and Plewa 2020). These efforts can be made by single actors or joint actions of multiple actors, and they can be directed at solving present issues or aimed at future development (Diaz Ruiz and Makkar 2021; Martin and Schouten 2014; Scaraboto and Fischer 2013).

Changes in markets can be a result of the consumers' initiatives (Ansari and Philips 2011; Kjeldgaard et al. 2016; Morais et al. 2019; Scaraboto and Fischer 2013), being that individual (Sandikci and Ger 2010) or collective (Dolbec and Fischer 2015). The consumers' active roles impact the market (Regany et al. 2021) or even create new ones (Diaz Ruiz and Makkar 2021; Martin and Schouten 2014). The way consumers interact in the market and their active approach toward the market can happen following different logics, whether in order to legitimize a practice that is being developed, whether in a more activist or participatory way, or co-creating the practices carried out (Branstad and Solem 2020).

Consumers' active participation in market shaping can be driven by interventions in products. Consumers materially transform a product to adapt their consumption to something that makes sense for them. Interfering with products or materials transforms the consumption of these products and materials into something they want to consume. In these cases, consumers interfere materially with products, altering the scripted product (Diaz Ruiz and Makkar 2021; Martin and Schouten 2014).

Method

To investigate how consumers bypass power expressions inscribed into products, we adopted a qualitative case study approach (Takahashi and Araujo 2019) focusing on Nespresso's coffee machines. The Nespresso system represents an exemplary case due to its design philosophy, which aims to create a "skilled barista" experience through a highly controlled, closed technological system (Cumming 2020). By examining consumer interactions with this system, from its project to its consumption—including not only drinking the coffee it makes but also its repairing practices by consumers—we explore the socio-material dimensions of market shaping.

Our data collection was conducted in three main phases: July 2018, July 2020, and December 2020, with a final round in February 2022. Each phase had distinct objectives, allowing for an evolving understanding of the company's strategies and consumer responses.

We employed a multi-method qualitative approach, drawing on three complementary data sources: 1) archival media; 2) consumer online data; and 3) autoethnography. During the first data collection, archival media, we analyzed corporate documents, including white papers, patents, and strategy reports from the Nespresso and Nestlé-Nespresso websites. Additionally, we examined news articles and industry reports (e.g., Lachapelle 2018) to contextualize Nespresso's market positioning and its technological design choices.

Regarding the consumer online data, we systematically collected and analyzed consumer-generated content from blogs, forums, and video tutorials on platforms such as iFixit, Hackaday, and YouTube. Selection criteria included relevance to Nespresso machine repair, depth of technical detail, user engagement (e.g., number of views or comments), and diversity of approaches to overcoming proprietary barriers. These sources provided insight into consumer practices for repairing and modifying Nespresso machines, revealing subversive engagements with the brand's proprietary system.

In the autoethnography (Wallendorf and Brucks 1993), both authors conducted studies based on their personal experiences with Nespresso machine repairs. The first author documented her repair attempts, capturing challenges faced without proprietary tools. Later, during the third research phase, the second author repeated this process, now equipped with appropriate tools, while also exploring advocacy movements related to the right to repair (e.g., repair.eu). Both authors maintained reflective fieldnotes to document observations,

emotions, and embodied experiences throughout the process (Ellis, Adams, and Bochner 2011).

These data sources collectively provide a multi-perspective account of the interplay between corporate strategies and consumer agency, incorporating insights from the firm, individual consumers, and broader advocacy movements.

Data were analyzed using a socio-material lens, emphasizing the entanglements between human and non-human actors in the repair process (Latour 1992). The analysis followed an iterative coding process following an hermeneutic approach (Thompson 1997), beginning with open coding, followed by an iterative coding process, identifying emergent themes related to power asymmetries, repair practices, and consumer strategies. The two authors independently coded initial data segments and discussed emerging patterns in regular analytical meetings, refining codes collaboratively and ensuring analytical consistency.

In total, we compiled 209 pages of visual and textual data, categorizing instances of consumer workarounds and corporate responses. Table 1 provides a summary of our data sources and collection methods.

Table 1. Data collection summary

Data type	Format	Examples
Archival media	Material regarding the firm's R&D, strategy, and actions	nespresso.com; nestle-nespresso.com; Lachapelle, 2018; theguardian.com
Consumer online data	Blogs, forums, and video tutorials	repair.eu; direitodereparar.com.br; repair.org; ifixit.com, hackaday.com
Autoethnography	Testing the different protocols available to fix/upgrade the machine.	Autoethnographic reports from both authors

By adopting this multi-method approach, we offer a nuanced understanding of how consumers engage with and reshape market structures, expanding the literature on power dynamics in consumer-product interactions.

Findings

Scripting Nespresso

Nespresso has reinvented the way millions of people worldwide prepare their coffee with a combination of a range of smartly-designed and convenient machines and portioned coffee capsules. With the original Nespresso capsule and a genuine Nespresso machine, anyone can make the perfect coffee, cup after cup, just as a skilled barista. Behind this simplicity lies a complex process that Nespresso has mastered in the quest to deliver the highest quality coffee to consumers (Nespresso 2022).

Many variables can ruin what would be a perfect espresso cup: the quality of the beans, the roasting, the grinding, the amount of coffee, the water pressure and temperature, the hand pressure in tamping the coffee in the portafilter, the brewing time, to name a few. It takes time, space for the machine, and dexterity—every new cup is an opportunity to fail again. Nespresso presented itself as an option that took up little space, guaranteed a standardized, fast result, and that anyone capable of pressing a button could make it. In other words, Nespresso is for someone who cares enough about the coffee they drink at home to pay more for it “but not enough to spend more than 30 seconds preparing it” (Cumming 2020).

This way, Nespresso reinvented how millions prepare coffee. The brand’s success was fueled not only by technical efficiency but also by a strong symbolic construction—positioning Nespresso as the choice for those who value quality but seek speed and simplicity (Cumming 2020). Of course, the brand’s symbolic constructions also propelled it to great market success, especially in the years when it enjoyed patents that protected it from competition and little questioning of the environmental impact of this consumption.

This convenience, however, comes at a cost. Nespresso designs its machines and capsules as closed systems, with minimal to no intervention on the part of the consumer. This controlled process also includes an assistance service to repair faulty machines. A technician visits consumers at their address. Simple repairs are carried out on the spot. For complex repairs, the machine is taken away, and the company lends another. This approach ensures brand control but also enforces dependency, limiting consumer agency and product longevity.

Nespresso's controlled ecosystem exemplifies a firm's strategic effort to impose consumption constraints, ensuring product dependency through proprietary machine design, limited repair options, and exclusive capsule compatibility. While the brand's marketing promises effortless convenience and premium quality, this model simultaneously curtails consumer agency, reinforcing planned obsolescence and repair restrictions. However, our analysis reveals that consumers do not passively accept these constraints. Instead, they engage in bypassing tactics, which not only challenge the manufacturer's control but also have broader implications for market structures and consumer empowerment.

The consumer actions observed in this study resonate with broader discussions of consumer-driven market transformation (e.g., Giesler 2008; Kjeldgaard et al. 2016; Martin and Schouten 2014). Rather than passive recipients of market offerings, consumers engage in strategic, and at times subtle, forms of tactics that reshape market dynamics. We categorize this active role into two interrelated practices: confronting and equipping. These tactics reflect a shift from isolated acts of defiance to forms of collective and distributed action, where consumers mobilize both human and nonhuman actors to challenge dominant market logics and co-create alternative market structures. As such, micro-level resistance can accumulate into macro-level change, revealing the transformative potential embedded in everyday consumer practices.

Breaking Nespresso conscription down

Despite these constraints, consumers challenge the manufacturer's control by resisting built-in barriers to repair. The first author's experience illustrates this: after observing a technician fix a simple issue with her machine's power button, she attempted the repair herself—only to discover that Nespresso had used proprietary oval-headed screws, preventing access with standard tools.

It seemed very easy to her. Her Nespresso coffee maker power button had failed before; she called customer service. She watched the guy opening the machine and cleaning the contacts behind the power button, which can build verdigris due to the exposure to steam. She was not particularly a handywoman, but it looked like a straightforward task even for her. She had the basic tools at home and would not spend the money calling customer service again.

She got the tools, turned the machine upside down, and… surprise: she faced the oddest screws ever. They looked like nails, but they were oval-headed screws that no screwdriver ever made could open. Would that be possible?

After surfing online, she learned that 'yes' would be the correct answer. Nespresso put screws that forbid access to repairing services besides its own. Officially, if you need your Nespresso machine repaired, you must call Nespresso, no matter how handy you are, or if you have had your coffee maker for ten years and the warranty has expired. However, she also found that consumers shared online all the solutions they could come up with; some guy built his own tool using a BIC pen barrel, tin foil, and epoxy and uploaded a video tutorial on YouTube, while another person developed a 3-D printing screwdriver model and freely shared it. Someone even built one piece of tool and can send it worldwide—you only have to commit yourself to sending the tool to the next user after using it. She shared this story with her father, who is very resourceful and handy, and he developed an oval screwdriver by transforming an old tool (Data from the autoethnography, collected in 2018).

This is the story lived by the first author in 2018. As she describes in her fieldnotes, searching online, she found a community of consumers developing creative ways to bypass these restrictions. Some crafted DIY tools from everyday objects, like a heated BIC pen barrel molded into a screwdriver. Others designed and shared 3D-printed screwdrivers. Some even organized global tool-sharing networks, ensuring that anyone needing access could participate. These collective efforts enabled consumers to regain control over their products, circumventing the firm's power inscriptions.

Over time, these consumer-led solutions gained traction, prompting market responses. More recently, some businesses started to mass-produce tools explicitly targeted to open Nespresso machines and sell them on eBay. In response, Nespresso itself modified its designs, incorporating standard Torx screws into newer models. The way in which consumers have dealt with the manufacturer's inscriptions on the product and consequent prescriptions on how to consume it demonstrates how consumers can bypass them, causing a break in the conscription—a sign that consumer acts can reshape markets.

Bypassing the power inscriptions

Consumers employ two main tactics to bypass the expression of power materialized in the impregnable screws: confronting and equipping.

Confronting

The first form of resistance, confronting, involves consumers rejecting Nespresso's scripted consumption by refusing to comply with its repair constraints. Instead of adhering to the firm's directive to rely exclusively on authorized technicians, consumers publicly contest these restrictions, voicing frustration in online communities, blogs, and video tutorials.

When they came across the screws that prevented access to the inside of the machine, consumers did not subscribe to Nespresso's prescription to call customer service, confronting this decision. Rather than complying with Nespresso's directive to use authorized repair services, consumers actively challenge the firm's control. In one of the many videos available on YouTube on how to hack the coffee maker, two users chat about their frustration: "Why do they design these machines like they are trying to stop someone breaking into a house? It's a bloody coffee machine!"; "So true. It's just a coffee machine, not Fort Knox. Thanks for the comment."

What differentiates mere dissatisfaction from confrontation is taking action. Confronting is an action-oriented process of directly engaging with a situation or problem. It is not just a matter of complaining. More than assertiveness in tackling the problem, we even saw a bit of aggressiveness—in one YouTube video, the consumer who teaches how to open the screws using a BIC pen barrel says:" These Swiss deserve to be punched." On a blog posting, another consumer mentions: "diabolical oval-headed screws (to hell with the manager who made that decision!)."

The consumers in our study not only expressed frustration but actively sought alternative solutions, engaging in DIY repairs, hacking the machine's proprietary screws, and sharing their knowledge online. This digital activism highlights the role of networked resistance, where dispersed individuals coalesce into collective action (Kjeldgaard et al. 2016).

Sometimes, the confronting gains a more philosophical approach, as we see in another YouTube video when the consumer is about to begin to dismantle the product:

Don't let the device dominate you—you dominate the device. We weren't created to be dominated by things. Things were created for human beings to dominate. So, you must have this mentality to get inside the device, even if you don't have much knowledge.

Beyond individual acts of defiance, these consumers challenge the socio-material power inscribed into Nespresso's machines. The presence of proprietary screws, a seemingly minor technical feature, embodies corporate control over product lifecycle management. By breaking into the machine's "guts," consumers symbolically and materially disrupt the company's authority. This resistance echoes broader discussions on repair culture (Godfrey, Price, and Lusch 2022), where access to repair is framed as a consumer right rather than a corporate privilege.

If the confrontation had only occurred privately, it would probably have been restricted to a few consumers; however, the confronters decided to make their dissatisfaction public. By making these confrontations public, consumers turn private frustrations into collective resistance, amplifying their impact. This public manifestation is part of the following tactic: equipping.

Equipping

The confronting tactic requires some elements to be fully fulfilled. Equipping is the activity of preparing and furnishing oneself with the means needed to accomplish the task of breaking the conscription. To successfully bypass restrictions, consumers equip themselves with both knowledge and tools.

They share step-by-step guides, design makeshift screwdrivers, and build resource networks. One online community sustained a ten-year-long tool-sharing chain across three continents, with participants committing to forwarding the tool and documenting their repair experiences. We already mentioned that consumers developed various ways to break into the "guts" of the machine. All these hacks were carefully detailed in videos or texts shared online. They range from very simple—heating the tip of a BIC pen barrel, shaping it into the head of the screw, and then using it as a tool after it has cooled—to very sophisticated—removing one of the oval screws with a pair of needle-nose pliers, placing it in a metal tube, melting and adding molten metal to the tube, cooling it, removing the screw that served as a mold and polishing the newly made tool.

One initiative covered ten years of consumer activity. It begins with another consumer outraged at the difficulty of accessing the inside of the machine: “I’ve never seen a consumer appliance protected this carefully.” He decided to offer the remaining capsules on a website and complained about why. Another consumer informs him that he has made a tool to open it from a bolt and kindly sends the small, improvised tool to the poster. This is the beginning of a chain that has lasted more than ten years. Each contributor could access the tool as long as they committed to sending it back and sent photos of the “machine’s guts” and an account of their experience. During this time, the courier lost the original tool, which was replaced by a more modern one, and traveled to three different continents and many countries. The post also became a place to share how to solve the problems encountered once the machine was open to sharing tips on other tools, handmade or purchased. It is a complete manual, built collectively and globally, that empowers ordinary consumers to break prescriptions.

These collective efforts extend beyond individual repairs. They highlight the broader implications of corporate-imposed constraints—bringing attention to planned obsolescence, waste reduction, and consumer rights.

Concluding remarks

Nespresso’s coffee machine shows how firms inscribe specific *scripts* into objects to prescribe particular forms of use and consumption. Nespresso’s design and business model exemplify a broader trend of corporate control over consumer behavior through technological restrictions. The firm’s inscriptions have a straightforward objective: to lock consumers into costly after-care services and reinforce a tightly controlled consumption ecosystem. While the company prescribes that consumption of the Nespresso coffee maker is restricted to pressing a button and drinking coffee, consumers understand that consumption goes beyond that—it also involves simple repair activities. So, they do not subscribe to the prescription of the object and develop bypassing tactics that allow them to access the “guts” of the product. This way, consumers resist company’s prescriptions, developing tactics that challenge the firm’s control and reshape market dynamics.

In Akrich and Latour’s (1992) terms, the endurance of Nespresso’s consumption arrangement depends on the conscription of actors—consumers, tools, materials, and scripts—that must align for the socio-technical system to function. When consumers opt out

or reconfigure these alignments, they destabilize the arrangement, opening space for market transformations (Nenonen and Storbacka 2020).

Bypassing tactics emerge as a form of consumer resistance that challenges the material constraints imposed by the firm, which involve confronting and equipping activities, which result in a dematerialization of the firm's power materialized in the screws that prevent access without the proprietary tool. This resistance operates on multiple levels: physically confronting the technical barriers (e.g., proprietary screws), equipping themselves with alternative tools, and sharing knowledge within online communities. Through these practices, consumers effectively dematerialize corporate control, rendering its physical manifestations obsolete.

The 'guts' of the Nespresso machine represent more than a mere technical interior; they symbolize a microcosm of corporate power, where firms attempt to dictate not just product use but also the lifecycle of consumption. By hacking these systems, consumers are not only altering an object but also engaging in broader resistance against planned obsolescence, disposability, and corporate gatekeeping. These acts of resistance resonate with broader initiatives like the right-to-repair movement and align with the insights of Godfrey et al. (2022), who show how repair practices, though often pragmatic, can challenge dominant production-consumption dynamics and contribute to more sustainable forms of consumption. In modifying the object, consumers also reshape the market, contributing to the formation of more open and enduring systems of exchange.

This case study contributes to ongoing conversations about consumer agency by demonstrating how everyday actions—such as opening a coffee machine—can disrupt entrenched power structures. By reclaiming access to repair, consumers contest the very foundation of Nespresso's business model, which relies on restricting product access and promoting dependency on proprietary servicing. This resistance challenges not only a single company but also broader industrial practices that prioritize firm control over consumer autonomy.

This case extends research on market shaping by showing how consumers act not only as recipients of market configurations but as agents who materially intervene in product infrastructures (Giesler 2008; Kjeldgaard et al. 2016). Their actions represent not merely ideological resistance but socio-material engagement—transforming scripts, undoing

prescriptions, and reconfiguring the socio-technical networks that sustain market arrangements (Hagberg 2016; Fuentes 2019). In this light, consumption becomes a site of negotiation where consumers reinterpret and resist the firm's intended logics, contributing to ongoing processes of market evolution (Branstad and Solem 2020; Kjellberg et al. 2015; Flaig et al. 2021).

Furthermore, the case raises questions about the evolving nature of consumer-object relationships. If products like Nespresso machines increasingly incorporate AI and smart technologies, how will consumer resistance evolve? Will consumers retain their ability to bypass restrictions, or will sentient machines develop their own 'preferences 'for compliance? These speculative considerations highlight the broader stakes of this debate—how technology mediates control and how consumers can continue to reclaim agency in an increasingly digitized market landscape (Hagberg and Kjellberg 2020).

Future research could explore how corporate responses to repair movements further shape market dynamics. As firms attempt to reinforce digital locks or integrate AI-driven diagnostics, will consumer tactics evolve in response? Additionally, examining cross-industry cases—such as resistance against software restrictions in consumer electronics—could further illuminate the interplay between corporate power, technological mediation, and consumer agency.

In sum, resistance to Nespresso's prescribed model of consumption is not a marginal or isolated act—it is a form of *market participation* that contests dominant logics and reclaims consumer agency. By engaging in repair, modification, and collective knowledge-sharing, consumers disrupt both the material and institutional arrangements that seek to limit their autonomy. This case reaffirms the importance of recognizing consumers not as passive end-users, but as active participants in scripting, descripting, and reshaping the very markets they inhabit.

References

Akrich, Madeleine (1992), "The de-scription of technical objects," in Shaping technology/building society: Studies in sociotechnical change, Wiebe E. Bijker and John Law, eds. London: The MIT Press, 205-24.

Akrich, Madeleine and Bruno Latour (1992), "A summary of a convenient vocabulary for the semiotics of human and nonhuman assemblies," in Shaping technology/building

society: Studies in sociotechnical change, Wiebe E. Bijker and John Law, eds. London: The MIT Press, 259-64.

Ansari, Shahzad and Nelson Phillips (2011), "Text me! New consumer practices and change in organizational fields," Organization Science, 22(6), 1579-1599.

Branstad, Are and Birgit. A. Solem (2020), "Emerging theories of consumer-driven market innovation, adoption, and diffusion: A selective review of consumer-oriented studies," Journal of Business Research, 116, 561-571.

Brondino-Pompeo, Karin (2024), "Factishing a market," in Market studies: Mapping, theorizing and impacting market action, Susi Geiger et al., eds. Cambridge: Cambridge University Press, 66–80.

Cumming, Ed. (2020, July 7). *How Nespresso's coffee revolution got ground down*. The Guardian. Retrieved from https://www.theguardian.com/food/2020/jul/14/nespresso-coffee-capsule-pods-branding-clooney-nestle-recycling-environment.

De Certeau, Michel (1984), The practice of everyday life. Berkeley, CA: University of California Press.

Denegri-Knott, Janice, Detlev Zwick, and Jonathan E. Schroeder (2006), "Mapping consumer power: an integrative framework for marketing and consumer research," European Journal of Marketing, 40(9/10), 950-71.

Diaz Ruiz, Carlos and Marian Makkar (2021), "Market bifurcations in board sports: How consumers shape markets through boundary work," Journal of Business Research, 122, 38-50.

Dolbec, Pierre-Yann and Eileen Fischer (2015), "Refashioning a field? Connected consumers and institutional dynamics in markets," Journal of Consumer Research, 41(6), 1447-68.

Ellis, Carolyn, Tony E. Adams, and Arthur P. Bochner (2011), "Autoethnography: an overview," Historical Social Research, 36(4), 273-290.

Flaig, Alexander, Daniel Kindström, and Mikael Ottosson (2021), "Market-shaping strategies: A conceptual framework for generating market outcomes," Industrial Marketing Management, 96, 254-66.

Fuentes, Christian (2019), "Smart consumers come undone: breakdowns in the process of digital agencing," Journal of Marketing Management, 35(15-16), 1542-62.

Giesler, Markus (2008), “Conflict and compromise: drama in marketplace evolution,” Journal of Consumer Research, 34(6), 739-753.

Giesler, Markus and Eileen Fischer (2017), “Market system dynamics,” Marketing Theory, 17(1), 3-8.

Godfrey, D. Matthew, Linda L. Price, and Robert F. Lusch (2022), “Repair, consumption, and sustainability: Fixing fragile objects and maintaining consumer practices,” Journal of Consumer Research, 49(2), 229-251.

Hagberg, Johan (2016), “Agencing practices: a historical exploration of shopping bags,” Consumption Markets & Culture, 19(1), 111-32.

Hagberg, Johan and Hans Kjellberg (2020), “Digitalized markets,” Consumption Markets & Culture, 23(2), 97-109.

Harrison, Debbie and Hans Kjellberg (2016), “How users shape markets,” Marketing Theory, 16(4), 445-468.

Hawa, Joelle, Jonathan Baker, and Carolin Plewa (2020), “Composing markets: A framework of intentionality in market-shaping,” Journal of Business Research, 121, 47-57.

Ingram, Jack, Elizabeth Shove, and Matthew Watson (2007), “Products and practices: Selected concepts from science and technology studies and from social theories of consumption and practice,” Design Issues, 23(2), 3-16.

Kjeldgaard, Dannie et al. (2016), “Consumers collective action in market system dynamics: A case of beer,” Marketing Theory, 17(1), 51–70.

Kjellberg, Hand, Frank Azimont, and Emma Reid (2015), “Market innovation processes: Balancing stability and change,” Industrial Marketing Management, 44, 4-12.

Lachapelle, Michael (2018), “Business Model Design - Nespresso - Evolution of a $4 Billion Business Model for Coffee”, Management Accounting Guideline, Chartered Professional Accountants Canada.

Latour, Bruno (1992), “Where are the missing masses? The sociology of a few mundane artifacts,” in Shaping technology/building society: Studies in sociotechnical change, Wiebe E. Bijker and John Law, eds. London: The MIT Press, 225-58.

Law, John, ed. (1991), A sociology of monsters: Essays on power, technology, and domination (No. 38). London: Routledge.

Martin, Diane M. and John W. Schouten (2014), "Consumption-driven market emergence," Journal of Consumer Research, 40(5), 855-70.

Morais, Isabela C., Eliane P. Z. Brito, and Ronan T. Quintão (2019), "Productive consumption changing market dynamics: A study in Brazilian DIY cosmetics," Latin American Business Review, 19(3-4), 323-47.

Nenonen, Suvi, Julia Fehrer, and Roderick J. Brodie (2021), "JBR special issue on market shaping and innovation," Journal of Business Research, 124, 236-39.

Nenonen, Suvi and Kaj Storbacka (2020), "Don't adapt, shape! Use the crisis to shape your minimum viable system–And the wider market," Industrial Marketing Management, 88, 265-71.

Nespresso (2022, July 8). Original coffee machines. Retrieved from: https://www.nespresso.com/au/en/order/machines/original.

Pickering, Andrew (1995), The mangle of practice: Time, agency, and science. Chicago, IL: University of Chicago Press.

Redström, Johan (2006), "Towards user design? On the shift from object to user as the subject of design," Design studies, 27(2), 123-39.

Redström, Johan (2008), "RE: Definitions of use," Design studies, 29(4), 410-23.

Regany, Fatima et al. (2021), "Conflicting coexistence of legitimation and delegitimation logics in a revived market: The case of a traditional clothing market," Journal of Business Research, 123, 438-449.

Sandikci, Özlem and Güliz Ger (2010), "Veiling in style: How does a stigmatized practice become fashionable?," Journal of Consumer Research, 37(1), 15-36.

Sassatelli, Roberta (2007), Consumer culture: History, theory and politics. SAGE Publications.

Scaraboto, Daiane and Eileen Fischer (2013), "Frustrated fatshionistas: An institutional theory perspective on consumer quests for greater choice in mainstream markets," Journal of Consumer Research, 39(6), 1234-57.

Takahashi, Adriana R. W. and Luis Araujo (2020), "Case study research: opening up research opportunities," RAUSP Management Journal, 55, 100-111.

Thompson, Craig J. (1997), “Interpreting consumers: A hermeneutical framework for deriving marketing insights from the texts of consumers ’consumption stories,” Journal of marketing Research, 34(4), 438-455.

Wallendorf, Melanie, and Merrie Brucks (1993), “Introspection in consumer research: implementation and implications,” Journal of consumer Research, 20(3), 339-359.

Watson, Matthew and Elizabeth Shove (2008) “Product, competence, project and practice: DIY and the dynamics of craft consumption,” Journal of Consumer Culture, 8(1), 69-89.

Unconstructiveness: The Ethics of Academic Commenting

Pia Polsa

Taija Townsend

Key words: academic commentary, (un)constructiveness, education practices, humanization, dialogue

"*These top journals turn people down left, right, and center!! I have had so many rejections, and it is the editors and reviewers who are so rude!! It takes a lot of time and energy.*"

We all remember the teachers who made us bloom with a single comment. We also remember those teachers whose words hurt our confidence, sowed a feeling of inferiority, or even made us walk away from something for which we had a great passion. The same applies to higher education field, as the above citation from an email conversation between two scholars illustrates. Today not only do unconstructive comments at the doctoral level of education exist, but they are particularly common either prolonging the thesis writing process or even preventing PhD candidates from graduating. The same unconstructive communication applies to many reviewers' comments. Rather than offering insights that could develop a paper and make it publishable, some reviewers, intentionally or unintentionally, mix unconstructiveness up with constructive criticality sometimes killing an idea altogether. Therefore, the aim of the current paper is to empirically explore the nature of academic commenting and reactions to it.

Feedback is defined as information about the gap between the expected and the actual level of performance, and commentary can only be considered as feedback when it is used to alter this gap (Walker 2009). A similar definition of feedback can be adapted to academic commenting, i.e., if commenting does not result in altering the gap between the expected and the actual level of performance but makes it only wider, then the provided comments are not constructive but unconstructive. Previous literature on the topic has mostly focused on the dialogue of written feedback (Nicol 2010) including academic tasks, such as assignments (Walker 2009). In macromarketing context discussion, debate and dialogue are approaches to learning that prepare students for solutions of macroproblems both in the classroom and after

graduation (Watson, Beninger, and Stanton 2024). A similar perspective can be taken to academic commenting by asking whether comments lead to discussion, debate or dialogue and which of these three approaches are the most constructive to narrow the gap between actual and expected level of performance. What is clearly wanting in this rather limited area of research, however, are studies that would take an empirical look at doctoral level education and specifically the way in which doctoral candidates and researchers react to the feedback that they receive from other scholars in learning-related contexts (e.g., conferences, peer review submissions), which is the niche that our paper aims at empirically addressing.

The approach of discussion, debate and dialogue (Watson, Beninger, and Stanton 2024) is applied as an analytical framework for our empirical data. More specifically, our intention is to classify the qualitative data accordingly depending on whether the original comment coupled with the reaction leads to discussion, debate or dialogue. Then, the data will be analyzed in terms of the consequences of (un)constructive discussions, debates or dialogues. The data itself consists of a pilot study in the institution of the authors. It is collected by means of an open-ended survey where faculty members and PhD candidates reply to questions concerning, feedback/review experiences, and their reactions to these comments. The questions are given in Appendix 1 and the results of this pilot study will be presented at the conference coupled.

The paper contributes to the macromarketing domain by uncovering the potential link between (un)constructive comments and individual wellbeing as well as the impact that these kinds of microlevel experiences might later have on creating supportive or destructive organizational cultures (meso). From a pedagogical perspective, the paper adds to research calling for humanized (e.g., Gidley 2012, Tan 2018 and Townsend 2020) and dialogue-based (e.g., Nicol 2010, Philipson and Wegerif 2017 and Wegerif 2022) approaches to education as well as to the classroom approach in macromarketing (Watson, Beninger, and Stanton 2024) by providing empirical data related to consequences of (un)constructive comments. Accordingly, we argue that, as an educational practice, academic commentary, should be treated as a collaborative effort to create knowledge that can make a difference as emphasized by macromarketing systems thinking (Watson, Beninger, and Stanton 2024).

References:

Gidley, J. (2012). Evolution of education: From weak signals to rich imaginaries of educational futures. *Futures*. 4(1):46-54.

Nicol D. (2010). From monologue to dialogue: improving written feedback processes in mass higher education, *Assessment & Evaluation in Higher Education*. 35(5): 501–51.

Philipson, N. and Wegerif, R. (2017). Dialogic Education: Mastering core concepts through thinking together. London: Routledge.

Tan, C. (2018). To be more fully human: Freire and Confucius. *Oxford Review of Education*. 44(3):370-382.

Townsend, T. (2020). Designing and developing humanized conditions for teaching and learning. A presentation workshop at IAFOR, Education and International Development, Tokyo (Japan).

Walker, M. (2009). An investigation into written comments on assignments: do students find them usable? *Assessment and Evaluation in Higher Education*, 34(1): 67–78.

Watson, F., Beninger, S. and Stanton, J. (2024). Marketing & Society in the Classroom: The Scaffolded Controversies Approach. *Journal of Macromarketing*, 44(3): 679-684.

Wegerif, R. (2022). Beyond democracy: Education as design for dialogue. In *Liberal Democratic Education: A Paradigm in Crisis*, (pp. 157-179). Brill mentis.

Appendix 1

Please respond to the following 16 open-ended questions concerning (un)constructive comments about your research work.

Question 1. Give one or several examples of ***a verbally delivered unconstructive comment*** concerning your work.

Question 2. What made the comment/s unconstructive?

Question 3. What happened as a consequence of the unconstructive comment/s?

Question 4. Who gave the comment/s: 1) a professor 2) a peer 3) a teacher 4) someone else (please specify who).

Question 5. Give one or several examples of ***a written unconstructive comment*** concerning your work.

Question 6. What made the comment/s unconstructive?

Question 7. What happened as a consequence of the unconstructive comment/s?

Question 8. Who gave the comment/s: 1) a professor 2) a peer 3) a teacher 4) someone else (please specify who).

Question 9. Give one or several examples of ***a verbally delivered constructive*** **comment** concerning your work.

Question 10. What made the comment/s constructive?

Question 11. What happened as a consequence of the constructive comment/s?

Question 12. Who gave the comment/s: 1) a professor 2) a peer 3) a teacher 4) someone else (please specify who).

Question 13. Give one or several examples of ***a written constructive comment*** concerning your work.

Question 14. What made the comment/s constructive?

Question 15. What happened as a consequence of the constructive comment/s?

Question 16. Who gave the comment/s: 1) a professor 2) a peer 3) a teacher 4) someone else (please specify who).

Please give the following information about yourself.

Age:

Gender:

Academic position:

Highest academic degree:

Where you got this survey from:

Please, send an email to XX or YY if you would be willing for an interview.

Understanding Doing Difference and Performativity: A Critique and Guide for Marketing Studies

Yuri Marcel Dallabrida

Delane Botelho

Abstract

This paper offers a critical reading and integration of Butler's performativity and West and Zimmerman's doing gender theories in marketing research. It identifies misrepresentations in existing studies and offers a multilevel framework for analyzing identity across different levels to advance understanding of identities in the marketplace.

Introduction

Gender is a pervasive topic in current debates across academia, religious spaces, and politics (Butler 2024). Queer experiences of gender and sexuality have long challenged traditional masculinity and femininity ideals as tied to male and female categories (Butler 1990). Dominant sociological views frames gender as a socially constructed expression of sex, defined by biological criteria (de Beauvoir 2011). However, scholars have questioned sex's status as a natural, objective category (Butler 1990; 1993; West and Fenstermaker 1995; West and Zimmerman 1987).

West and Zimmerman (1987) theorized that gender and sex produce differences used to maintain power structures, distribute resources, and justify inequalities as natural (West and Fenstermaker 1995). Gender defines expectations for individuals rooted in exclusion (Butler 1993): hegemonic discourses dictate who is a viable subject and who is "unintelligible" or "abject" (Butler 1990). As long as gender and sex are seen and reproduced as natural, they serve as institutionalized forms of violence that support inequalities and oppression (Butler 1990; 1993).

Despite their influence, key aspects of these theories are often misrepresented in marketing research. This theoretical article integrates Butler's (1990) concept of performativity and West and Zimmerman's (1987) doing gender into a multilevel analytical framework applicable to identity categories in marketplace contexts. We explore how these authors challenge the sociology-biology divide and theorize the social construction of gender and sex. We also evaluate and critique how their theories have been incorporated into

marketing research while providing insights for advancing the application of these theoretical lenses in marketing studies. We propose a framework that integrates both theories across macro, meso, and micro levels to guide future studies.

Gender and Sex

Sex is typically understood as objectively assigned at birth based on biological traits like genitalia or chromosomes. Gender is viewed as a cultural expression of sex through behaviors and social roles (Tafani et al. 2024; Zayer and Coleman 2015). West and Zimmerman (1987) and Butler (1990) challenge the binary concept of sex, highlighting cases like intersex individuals (interACT 2021). Both propose that sex and gender are socially constructed. West and Zimmerman's (1987) ethnomethodological approach examines how gender is locally produced (West and Fenstermaker 1995), while Butler (1990) critiques the origins of gender, showing it is an effect of social relations. Misrepresentations arise when marketing research cites these authors while framing sex as biological and gender as cultural (Zayer and Coleman 2015; Tafani et al. 2024).

Performativity and Performance

Performatives are statements that simultaneously declare and create reality. Declaring "the baby is a girl" creates gender (Butler 1990). Gender is made real through discourse and repeated enactments. Confusion often arises between Butler's performativity and Goffman's (1979) performance theory-which sees performances as conscious acts by pre-existing subjects-with works claiming that gender is a performance (Kacen 2000) or "an act of "drag"" (Goulding and Saren 2009, p. 48). Butler (1990; 1993) argues that gender performances constitute identity through compulsory repetition, producing concrete consequences. Thus, gender is shaped by social norms, not individual choice.

Doing Gender

West and Zimmerman (1987) similarly describe gender as something individuals do rather than inherently possess. In *Doing Gender*, they move masculinity and femininity from essential traits to social properties. This process shapes individuals' gendered identities and reinforces the perception of gender as natural (West and Zimmerman 1987). Echoing

Goffman's (1979) performance management, they suggest that individuals conform to gender norms to avoid accountability for inadequate gender performances (West and Zimmerman 1987). As gender is deeply embedded in social divisions, doing gender becomes an ongoing, unavoidable social interaction (West and Zimmerman 1987; 2009; Harju and Huovinen 2015; Seregina 2019).

At the societal level, West and Zimmerman (1987) show how doing gender perpetuates and institutionalizes differences, creating systems of inequality that seem natural (West and Fenstermaker 1995). In *Doing Difference*, they apply this framework to gender, race, and class, showing how repeated enactments consolidate social structures. As individuals do gender according to institutionalized norms, they reinforce these systems, making gender both a rationale and an outcome of social interactions (West and Fenstermaker 1995). Gender gains legitimacy through repetition as natural and essential (Humphreys 2010; Johnson, Dowd, and Ridgeway 2006), although its dependence on doings allows it to evolve over time (Deutsch 2007).

Agency, Determinism, and Change

Gendered performances must align with cultural norms to perpetuate gender (Butler 1993; Hein and O'Donohoe 2014). For Butler (1993), gendered subjects come into being through acts that repeat intelligible gender norms. Deviating from them results in exclusion, with non-conforming individuals becoming "abjects" (Butler 1990; 1993). Thus, being recognized as a subject requires following institutional norms (Butler 1993). Performativity highlights how discourse, not individual choice, produces subjects (Butler 2024).

Butler (2004) introduces undoing gender as a form of critical agency, where subversive performances challenge and destabilize gender norms. For example, gothic subculture re-signifies gender through playful subversion (Goulding and Saren 2009). However, such acts often provoke violent responses aimed at preserving hegemonic discourses (Butler 2004; Harju and Huovinen 2015). West and Zimmerman (2009) critique the term "undoing gender" because the categories existence is not challenged by those action. Instead, redoing gender (West and Zimmerman 2009), resignification (Butler 2004), and subversive repetition (Butler 1990) better capture their meanings.

A Multilevel Framework of Analysis

We propose that marketing research can benefit from applying Butler's (1990) and West and Zimmerman's (1987) theories across macro (hegemonic discourses), meso (market actors), and micro (consumer) levels inspired by Zayer et al. (2019) to understand how gender is (re)done in the marketplace (Figure 1). This framework is applicable to other identity categories, such as race and class (West and Fenstermaker 1995).

Conclusion

This article contributes to marketing research by integrating Butler's (1990) performativity and West and Zimmerman's (1987) doing gender into a multilevel analytical framework. It critiques misrepresentations in existing literature and offers an overview of such theories. By exploring the interaction of social norms, individual behaviors, and market dynamics, this framework offers insights into how identities are formed, maintained, and transformed across different levels of analysis.

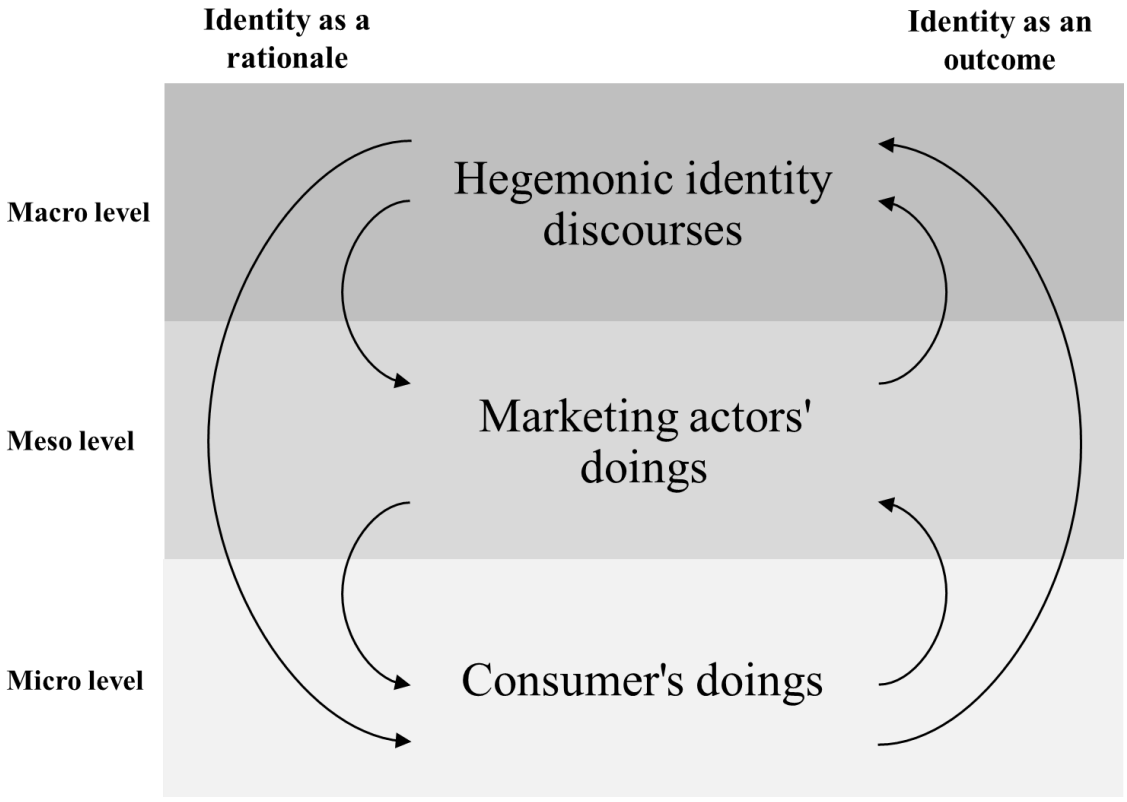


Figure 1. Doing identity in the marketplace as a two-sided process.

References

Butler, Judith (1990), Gender Trouble: Feminism and the Subversion of Identity. Routledge.

Butler, Judith (1993), *Bodies that Matter: On the Discursive Limits of Sex*, Routledge.

Butler, Judith (2004), *Precarious Life: The Powers of Mourning and Violence*, Verso.

Butler, Judith (2024), *Who's Afraid of Gender?* Farrar, Straus and Giroux

de Beauvoir, Simone (2011), *The Second Sex*, Vintage.

Deutsch, Francine M. (2007), Undoing Gender, *Gender and Society*, 21(1), 106-27.

Goffman, Erving (1979), *Gender Advertisements*, HarperCollins.

Goulding, Christina and Michael Saren (2009), Performing Identity: An Analysis of Gender Expressions at the Whitby Goth Festival, *Consumption, Markets and Culture*, 12(1), 27-46.

Harju, Anu A. and Annamari Huovinen (2015), Fashionably Voluptuous: Normative Femininity and Resistant Performative Tactics in Fatshion Blogs, *Journal of Marketing Management*, 31(15-16), 1602-25.

Hein, Wendy and Stephanie O'Donohoe (2014), Practising Gender: The Role of Banter in Young Men's Improvisations of Masculine Consumer Identities, *Journal of Marketing Management*, 30(13-14), 1293-319.

Humphreys, Ashlee (2010), Megamarketing: The Creation of Markets as a Social Process, *Journal of Marketing*, 74(2), 1-19.

interACT (2021), "What is Intersex?", Last Accessed January 28, 2025. https://interactadvocates.org/faq/#definition

Johnson, Cathryn, Timothy J. Dowd, and Cecilia L. Ridgeway (2006), Legitimacy as a Social Process, *Annual Review of Sociology*, 32(1), 53-78.

Kacen, Jacqueline J. (2000), Girrrl Power and Boyyy Nature: The Past, Present, and Paradisal Future of Consumer Gender Identity, *Marketing Intelligence and Planning*, 18(6/7), 345-55.

Seregina, Anastasia (2019), Undoing Gender Through Performing the Other, *Consumption Markets and Culture*, 22(4), 454-73.

Tafani, Eric, Franck Vigneron, Audrey Azoulay, Sandrine Crener, and Abdul Zahid (2024), The Influence of Culture and Gender in Luxury Brand Consumption: A Comparison Across Western and Eastern Culture Consumers, *Journal of International Marketing*, 32(4), 58-80.

West, Candance and Sarah Fenstermaker (1995), Doing Difference, *Gender and Society*, 9(1), 8-37.

West, Candance and Don H. Zimmerman (1987), Doing Gender, *Gender and Society*, 1(2), 125-51.

West, Candance and Don H. Zimmerman (2009), Accounting for Doing Gender, *Gender and Society*, 23(1), 112-22.

Zayer, Linda Tuncay and Catherine A. Coleman (2015), Advertising Professionals' Perceptions of the Impact of Gender Portrayals on Men and Women: A Question of Ethics? *Journal of Advertising*, 44(3), 264-75.

Understanding markets and marketing from a non-Western perspective

Masoud Karami

Ben Wooliscroft

Although marketing as a field has made remarkable progress in understanding and theorizing consumers and other stakeholders' (firms, distributors, suppliers, sales force, etc.) behaviours, the mainstream marketing knowledge drives almost exclusively from Western, industrialized, and so-called developed economies (Burgess and Steenkamp 2006). Henrich, Heine, and Norezayan (2010) introduced the concept of 'Western, Educated, Industrialised, Rich and Developed' (WEIRD) cultures to emphasise unrepresentativeness of marketing research with its focus on a small part of the world (Wooliscroft and Ko 2023). We argue that marketing field needs to study contextual differences which drive consumers and other stakeholders' behaviours in different societies. More specifically, we argue that culture plays a critical role in shaping and directing different stakeholders' market-related behaviours. Marketing theories build on several key cultural assumptions about stakeholders. Modernity and its perception of human being lies at the heart of those assumptions. Individualism, humanism, free choice, and rule-based societies are among the most important assumptions in mainstream marketing theories. With such assumptions, the main job of marketing systems is satisfying individuals who care about themselves more than anything else (Carù and Cova 2003) and their lifetime is the only imaginable span of time which must be fully enjoyed.

However, not all societies are modern in their philosophy of life. Iranian culture provides a significant departure from those modern assumptions, despite its modern outlook. Iranian culture builds on significantly different assumptions with family being the key unit in Iranian society (Karami et al. 2024). The Devine and sacred nature of human being who lives in a sacred cosmos (Nasr 2013) entails an Iranian consumer and other stakeholders to consider several other factors in their behaviours rather than simply satisfying their needs. However, Iran is understudied due to its isolation form the international markets because of heavy economic sanctions (Karami, Wooliscroft, and Hejazinia 2024) and sometimes misrepresented by marketing scholars who have seen Iran from Western marketing perspective. For instance, Shultz et al. (2014, p. 87) claimed that "Access to [Iran] for purposes of rigorous and thorough research is not easy. Scholars therefore must be creative when studying such systems and may be limited to interpreting extant findings by others." Based on this unrealistic assumption they

build on "a short film documenting Nicholas Kristof's 2012 tour through Iran, and an ensuing panel that analysed and discussed the film during the 39th Annual Macromarketing Conference." Which is building on wrong philosophical assumptions about the country and as result applying a misleading methodology and data analysis approaches. Karami and Wooliscroft (2015) addressed some aspects of philosophical and mythological confusion of the article in the 40th Annual Macromarketing Conference.

In this study, we argue that marketing field is built on the generalizability of findings across cultures, which is due to the dominance of objectivism in its ontology and positivism in its epistemology allowing the field to ignore differences across cultures. Objectivist ontology assumes that there is an external reality to which marketing scholars direct their attention; and positivist epistemology claims that only factual knowledge or observable reality gained through senses is trustworthy (Alharahsheh and Pius 2020). As such, mainstream marketing research does not penetrate to the cultural nuances and philosophical differences among different cultural contexts. We propose a methodological framework delineating nuances through which marketing research contributes to the development and contextualisation of marketing theory in Iranian context as an understudied context (Karami and Wooliscroft 2015), paving the way for further contextualisation of marketing theory by including non-WEIRD cultures. Our suggested framework includes four stages as follows: ontological and epistemological considerations, acquisition of meaningful data, analysis of the data, and theorizing. Our framework suggests considering constructivism and social constructivist ontology in understanding the nature of human being in Iranian society. Constructivism assumes that the world is in constant state of revision (Bryman and Bell 2007). Our framework suggests applying interpretivist epistemology implying that that every individual constructs her/his account of the world, and social constructionism assumes that such perception is constructed collectively (Bryman and Bell 2007). Relying on culturally sound ontological stance and epistemological approaches enables marketing scholars to dig deeper into the roots of different stakeholders' market-related behaviours by informing methodology and data analysis techniques (Askegaard and Linnet 2011; Reed and Alexander 2009). We argue that the entire process of fine-tuning the philosophy of research will enable more contextualized theories accounting for contextual differences that really matter (Askegaard and Linnet 2011). Our study contributes to contextualisation of marketing theories to embrace

non-western contexts. This is a timely and important contribution considering new political economic changes such as BRICS's[15] new development taking place in the global south.

References

Alharahsheh, H. H., and Pius, A. (2020), "A review of key paradigms: Positivism vs interpretivism," *Global Academic Journal of Humanities and Social Sciences*, 2(3), 39–43.

Askegaard, S., and Linnet, J. T. (2011), "Towards an epistemology of consumer culture theory: Phenomenology and the context of context," *Marketing Theory*, 11(4), 381–404.

Bryman, A., and Bell, E. (2007), *Business research methods*. Oxford: Oxford University Press.

Carù, A., and Cova, B. (2003), "Revisiting consumption experience: A more humble but complete view of the concept," *Marketing Theory*, 3(2), 267–286.

Henrich, J., Heine, S. J., and Norezayan, A. (2010), "The weirdest people in the world?" *Behavioral and Brain Sciences*, 33(2–3), 1–23; 63–75.

Karami, M., Karimi, Y. M., Akbari, M., and Gnoth, J. (2024), "Rural women entrepreneurship: When femininity compensates for institutional hurdles," *Asian Business and Management*, 23(5), 738–766.

Karami, M., and Wooliscroft, B. (2015), "Macromarketing research in Iran: On the dangers of hearsay," paper presented at the 40th Annual Macromarketing Conference, Chicago, USA (June).

Karami, M., Wooliscroft, B., and Hejazinia, M. (2024), "Struggling and thriving: Effectuation in social and economic stress," *Sustainability*, 16(4), 1366.

Patel, R. J. (2019), "BRICS emerging markets linkages," *The Journal of Private Equity*, 22(4), 42–59.

Nasr, S. H. (2013), "The cosmos and the natural order," in *Islamic spirituality*, 345–357. Routledge.

Reed, I., and Alexander, J. (2009), "Social science as reading and performance: A cultural-sociological understanding of epistemology," *European Journal of Social Theory*, 12(1), 21–41.

[15] /news/articles/2025-01-08/brics-now-includes-indonesia-iran-uae-egypt-ethiopia

Shultz, C. J., Peterson, M., Zwick, D., and Atik, D. (2014), "My Iranian road trip – Comments and reflections on videographic interpretations of Iran's political economy and marketing system," *Journal of Macromarketing*, 34(1), 87–94.

Wooliscroft, B., and Ko, E. (2023), "WEIRD is not enough: Sustainability insights from non-WEIRD countries," *Journal of Macromarketing*, 43(2), 171–174.

Unlocking the Growth Potential for Lebanese Women-led MSMEs: The Role of Society, Institutions, and Support Systems

Hossein Eslami

For several decades, Lebanon has been struggling with various economic, financial, political and social challenges stemming from the aftermath of the Lebanese civil war, multiple cycles of military conflicts with Israel, the severe implications of the Syrian conflict, the COVID epidemic, and lately the collapse of the Lebanese banking sector. Lebanon has seen a spiral escalation in the multi-faceted crisis bringing the Lebanese economy to the verge of collapse. All these difficulties severely hinder the performance and growth of Lebanese businesses in general and women-led small businesses in specific.

Micro Small and medium enterprises (MSMEs) are crucial for economic growth in developing markets, and play a vital role in Lebanon's struggling economy. Over the past two decades, there has been a significant rise in the number of MSMEs in different sectors like agri-food venturing into international markets. Recognized as progressively essential for lasting success, internationalization may serve as a significant economic supporter in emerging nations and as a developmental driver for such firms.

To tackle the crisis in the country, Lebanese women are getting more immersed in economic and social productivity, whether as members in men-led organizations or as leaders of their own enterprises. Lebanese women entrepreneurs are bringing a much-needed contribution to a challenged and diminishing economy. Nevertheless, besides the political, economic and financial challenges facing enterprises in Lebanon, Lebanese women leaders have the additional challenge of facing the prevailing social norms in Lebanon which in most cases are disempowering and restrictive.

Support to MSMEs, who employ approximately 50 percent of the labor force in the country, may come in various forms, including financial aid such as grants, technical assistance such as training in technical skills, or a combination of both. These support programs, in the absence of a strong government and internal institutions, come from various international aid agencies and NGOs with different scopes and agendas. While the number of such programs have increases significantly over the past few years, only a limited number of programs explicitly concentrate on businesses led or owned by women, and the actual effectiveness of these programs is questionable.

This study investigates the challenges and enablers faced by women-led MSMEs, especially those in rural areas of Lebanon, seeking to expand their businesses globally. Operating within an extremely difficult environment marked by multi-layered factors of crisis and instability, these women entrepreneurs demonstrate remarkable resilience and innovation. Our first study uses a qualitative research method, conducting semi-structured interviews with women-led MSME leaders to explore the internal and external factors influencing their internationalization journeys. This study aims to identify the main challenges faced by the Lebanese Women-led MSMEs and the impact of the ongoing crisis on their export strategies. Furthermore, this study aims to examine the role of the supporting ecosystem, recognizing its efforts to provide training, networking opportunities, and financial grants. In the second qualitative study, we conduct semi-structured interviews with experts and leading officers in the support programs by international agencies and NGOs, to investigate the positive and negative aspects of the support programs. The aim is to come up with recommendations on development of more targeted and impactful initiatives to support MSMEs' in the regions going through crisis. Beyond this, the findings would have important implications for the policy makers as per how to improve the marketing systems required for the success of MSMEs in general and women-led MSMEs in specific.

Keywords: Women-led MSMEs, Internationalization, Crisis, Support Ecosystem, Marketing Systems, Qualitative study

Unpaid Care work: Resisting affectively through the 'ethics of care'

Adriana Guedes Arcuri

Tânia Veludo-de-Oliveira

Gretchen Larsen

In contemporary society, we find ourselves in a "crisis of care" where the essential values of compassion and community have been diminished (Chatzidakis et al. 2025, Fraser 2016). Care—or affective labor (Fraser 2016) — is foundational to human life; it nurtures and sustains us, yet has historically been undervalued (Federici 2019; Fraser 2016; Tronto 2007). Care work has long been shaped by intersecting dynamics of gender, race, and class, being delegated to those that have less power in our society such as vulnerable and marginalized populations (Tronto 2007). For vulnerable women and girls, unpaid domestic labor is deeply influenced by entrenched gender norms that shape their opportunities and constrain their social mobility (Klein 2021; Perez 2019). These norms impose domestic expectations that often perpetuate a cycle of inequality, limiting educational and economic prospects for women (Perez 2019).

Though sidelined, care has been receiving increasing attention in marketing and management lately (Acciari 2023, Alacovska 2020, Banerjee et al. 2024, Chadzidakis et al. 2024, Klein 2021, Koskinen 2023, Kravel-Tovi and Lahad 2022, Parsons et al. 2021, Pirani et al. 2022, Stovell et al. 2025). This scholarship has been exploring how the reproduction of labor-power is achieved through the expropriation of unpaid caring responsibilities predominantly undertaken by women, perpetuating neoliberal discourses that sustain gender regimes of mutual obligations and colonial expropriations (Stovell et al. 2025, Klein 2021). Additionally, the growing demand for care work and the cumulative effects of its marketization have been examined (Chadzidakis et al. 2024), as digital platforms increasingly connect caregivers and care recipients (Macleavy 2021). These phenomena highlight a scarcity of care workers in advanced economies, where migrant labor fills gaps in essential services but also contributes to systemic inequalities (Macleavy 2021). The ambiguous nature of care is also reflected in studies of consumption practices, which reveal how what we consume manifests care and caring (Kosiken 2023, Shaw et al. 2017), while the care-less market excludes and reproduces affective inequalities (Hutton 2019). Marginal feminist perspectives conceptualize "*deep care*" as a relational and mutual responsibility, framing the right to care and be cared for as an act

of resistance (Banerjee 2024, Acciari 2023). The ethics of care (Tronto 1993) emphasize mutuality, solidarity, and affectivity as key drivers of action, countering market-driven individualism (Alacovska and Bussonet 2021).

Drawing from Maria Lugones' framework, the 'fractured locus,' and echoing feminist work on ethics of care (Tronto 1993), we continue the theorization from the margins, amplifying the voices of those systematically silenced in caring dynamics (Banerjee 2024). Through a decolonial ethnography (Manning 2018; 2021) conducted between November 2022 and April 2023, this research involved participant observations in workshops held by the NGO Plan International, interviews with program facilitators, and in-depth interviews with 27 teenage girls. The teenage girls inhabit the 'fractured locus', living in impoverished conditions in the outskirts of Brazil, in rural areas and slums of Bahia, Maranhão, São Paulo and Piauí. The 'fractured locus' refers to the complex, often contradictory position inhabited by those who experience multiple forms of oppression simultaneously (Lugones 2010). This concept describes the internal conflict and multiplicity of perspectives that arise when someone navigates overlapping identities—such as race, gender, class, and sexuality—within a colonial, patriarchal system that fragments and devalues their full humanity. For Lugones (2010), a 'fractured locus' is not simply a site of disempowerment; it is also a potential source of resilience and resistance. Those living within a 'fractured locus' often develop a "double consciousness" or multiple ways of seeing, as they are forced to understand both the dominant worldview and their own marginalized experiences. This dual awareness allows those oppressed beings to see the world through different perspectives and resist the limitations and injustices of the dominant system in unexpected ways.

Our first contribution extends the work of Chadzidakis and colleagues (2025) showing that care, despite being marketized, can be abundant and though unpaid, valued and accumulated in the mutual network it is embedded. We highlight how these young women accumulate a feminine version of the social and emotional capital through the practice of care in the form of an affective currency in line with affective economies (Ahmed 2004; Raw and Mckie 2019) that builds collaborative systems of mutuality to surpass their precarious circumstances. They express a desire to "give back" to their parents, appreciating the little they have received as something significant. The cumulative effect of care in their daily lives encourages them to keep caring for others, in a cycle of reciprocity that circulates beyond

their own family. The second contribution calls for a reimagining of care as a collective site of relational resistance and resilience. The girls of this research foresee a collective better future but not only for them. They dream of helping others, eradicating hunger, and supporting those facing even greater challenges than their own. These acts of caring reclaim their full humanity denied by the process of dehumanization of the coloniality of gender (Lugones 2010). These acts of care resonate with Lugones' (2010) concept of infrapolitics, where resistant subjectivities are articulated not through formalized public politics but through every day, affective actions that confront colonial and capitalist oppression. This infrapolitical resistance disrupts the dehumanizing effects of the coloniality of being, moving instead toward what Lugones (2010) describes as the creative activity of being. Through their care work and aspirations, these young women redefine themselves as **agents of change** rather than passive victims of their circumstances. Both contributions are deeply intertwined with the ethics of care moral values: attentiveness, responsibility, competence and responsiveness (Tronto 1993). By centering the experiences of teenage girls in Brazil, the study highlights care as a transformative practice that offers alternative ways of being, knowing and relating. The practice of mutuality, reciprocity, and solidarity reflects both an affective dimension and a collective political dynamic, enabling these practices to transcend the burdens of unpaid care work. This form of resistance is both deeply affective and inherently political, rejecting the logic of capital and grounding itself in a feminist ethics of care (Tronto 1993).

References

Acciari, Louisa (2024), "Caring is resisting: Lessons from domestic workers' mobilizations during COVID-19 in Latin America," *Gender, Work & Organization*, 31(1), 319-336.

Ahmed, Sarah (2004) Affective economies. *Social Text* 22(2): 117–139.

Alacovska, Ana (2020). From passion to compassion: A caring inquiry into creative work as socially engaged art. *Sociology*, 54(4), 727-744.

Alacovska, Ana and Joelle Bissonnette (2021). Care-ful work: An ethics of care approach to contingent labour in the creative industries. *Journal of Business Ethics*, 169, 135-151.

Banerjee, Pallavi, Chetna Khandelwal and Megha Sanyal (2024), "Deep care: The COVID-19 pandemic and the work of marginal feminist organizing in India," *Gender, Work & Organization*, 31(4), 1479-1504.

Chatzidakis, Andreas, Giana M. Eckhardt and Katharina C. Husemann (2025), "The cumulative effects of marketized care," *Journal of Consumer Research*, 51(5), 959-981.

Federici, Silvia (2019). *Re-enchanting the world: Feminism and the politics of the commons*. PM Press.

Fraser, Nancy (2016), "Capitalism's Crisis of Care," *Dissent*, 63 (4), 30–7.

Hutton, Martina (2019), "The care-less marketplace: exclusion as affective inequality," Consumption Markets & Culture, 22(5-6), 528-544.

Klein, Elise (2021), "Unpaid care, welfare conditionality and expropriation," Gender, Work & Organization, 28(4), 1475-1489.

Koskinen, Outi (2023), "Moderating contentious care relations: Meat consumption among Finnish consumers," Sociology, 57(1), 120-136.

Kravel-Tovi, Michal and Kinneret Lahad (2022), "It Is My Turn Now: How and Why 'Single'Women Complain about Non-Reciprocal Gift-Giving," Sociology, 56(2), 244-261.

MacLeavy, Julie (2021), "Care work, gender inequality and technological advancement in the age of COVID-19," Gender, Work & Organization, 28(1), 138-154.

Manning, Jennifer (2018), "Becoming a decolonial feminist ethnographer: Addressing the complexities of positionality and representation," Management Learning, 49(3), 311-326.

Manning, Jennifer (2021), "Decolonial feminist theory: Embracing the gendered colonial difference in management and organisation studies," Gender, Work & Organization, 28(4), 1203-1219.

Parsons, Elizabeth, Treasa Kearney, Emma Surman, Benedetta Cappellini, Sue Moffat, Vicki Harman and Klara Scheurenbrand (2021), "Who really cares? Introducing an 'Ethics of Care' to debates on transformative value co-creation," Journal of Business Research, 122, 794-804.

Pérez, Leda M. (2019), "Low-income "Employers" and Adolescent Domestic Workers," Labour, Capital and Society/Travail, capital et société, 49(2), 66-89.

Pirani, Daniela, Vicki Harman and Benedetta Cappellini (2022), "Family practices and temporality at breakfast: Hot spots, convenience and care," Sociology, 56(2), 211-226.

Tronto, Joan (1993). Moral boundaries: A political argument for an ethic of care. Abingdon: Routledge.

Lugones, Maria (2010), "Toward a decolonial feminism," Hypatia, 25(4), 742-759.

Raw, Anni and Linda McKie (2020), "Exploring women's mutuality in confronting care-precarity: 'Care accounts'–A conceptual tool," Sociology, 54(1), 53-69.

Shaw, Deirdre, Robert McMaster, Cristina Longo and Nil Özçaglar-Toulouse (2017), "Ethical qualities in consumption: Towards a theory of care," Marketing Theory, 17(4), 415-433.

Stovell, Clare, Maria Daskalaki, Alexis Hawthorne and Charikleia Tzanakou (2025), "The re-organization of care and working lives during the pandemic: Lived experiences of the COVID-19 policy context in the UK," Gender, Work & Organization, 32(1), 259-280.

Value Dynamics In Collective Mega-Events

Jannsen Santana

Daiane Scaraboto

Flavia Cardoso

Introduction

Collective mega-events (CMEs) are short-term events with long-term consequences for the cities that stage them (Roche 1994). Spiritual mega-events characterized by the temporary gathering of thousands or millions of people in a destination (Turner and Turner 2011). Such events create various types of value for stakeholders (e.g., economic value for local businesses and the tourism industry, transcendental value for pilgrims). However, they can also generate value destruction, mainly through generating large amounts of post-consumption waste.

Research on sustainable consumption has largely focused on individual behaviors (e.g., White, Habib, and Hardisty 2019), and routine consumption contexts (e.g., recycling, shopping) (Gonzalez-Arcos et al 2021). CMEs differ from these contexts in that they are complex, large-scale, and temporary-bound events that consumers seek for entertainment (e.g., World Cup, music festivals) or spirituality (e.g., pilgrimages). In CMEs, atmospheres guide consumers' emotions and behaviors (Hill, Canniford, and Eckhardt 2021), interfering with consumers' potential intentions to behave more sustainably. As such, to deepen our understanding of (un)sustainable consumption, we aim to unpack the dynamics of value creation and destruction in collective mega-events. In particular, we ask: *How do value creation and destruction unfold in collective mega-events?*

Literature review

Research in marketing often discusses value creation as the process leading to value outcomes: the various benefits people perceive in a consumption experience (Holbrook 1999). We are interested in interdependent value dynamics – when value can be destroyed in addition to being created (Abid et al. 2022; Bruce et al. 2019), and how these dynamics unfold in the context of CMEs. In such contexts, it is critical to consider the interdependencies among multiple stakeholders (Baldassare et al. 2017; Neumeyer and Santos 2018).

Recent research on CMEs (e.g., Arnould, Arvidsson, and Eckhardt 2021; Hill, Canniford, and Eckhardt 2022) indicates that such events can be catalysts of value for stakeholders (Wan

and Song 2019). Tourism research on mega-events has also indicated that localized events attended by masses can lead to value destruction (Mair et al. 2020; Shinde 2007). In economy, decolonial streams of research propose breaking free from current notions of development and reconnecting to indigenous philosophies, such as the Andean and Amazonian cosmology of *Sumak Kawsay,* which sustains a more harmonious co-existence between individuals, society and nature, with a reimagination of nature as having its own rights (Acosta 2016). Drawing from these literatures, we anticipate that collective mega-events will generate value creation *and* destruction (Plé and Cáceres 2010) in several ways, affecting not only other stakeholders beyond consumers and firms (e.g., local residents), but also the environment – an often-neglected stakeholder. Negative environmental impacts may include excessive resource extraction, carbon emissions, and post-consumption waste.

Method

To explain how value creation and destruction unfold in CMEs, we built a case study of two religious pilgrimages in Brazil: Círio de Nazaré and Juazeiro do Norte. We collected ethnographic data (Fetterman 1989) through participatory observation and interviews (Baldassarre et al. 2017). This approach is ideal for preserving real-world occurrences of comprehensive and significant aspects, and well aligned with our intention to observe stakeholders' value dynamics in such events, especially taking into consideration the sustainability topic in less affluent contexts.

Our dataset includes 82 interviews with pilgrims, service providers, church members and local legislators, fieldnotes on 67 days of immersion hosted by local families and following the pilgrimage's main activities, 900+ photos, and 10h+ videos. All data was collected by the first author. Our analysis was based on close readings of the dataset, which was organized in themes identified through iterations between the data and the literature on collective mega-events, value co-/creation and destruction, and spirituality in consumption.

Findings

In addition to value creation and destruction, which prior literature indicates as taking place in CMEs, we found that CMEs may also lead to value waste, and value recovery. To capture these complex value dynamics, we map these four processes along three temporal stages of collective mega-events: pre-, during and post-event (Hill et al. 2021). Table 1 summarizes our findings.

Preparation: Designing the mega-event

Preparation for the pilgrimages involve various stakeholders: church leaders, city administrators, business managers, local residents, and pilgrims (who prepare for the pilgrimage by making travel arrangements). Businesses – formal and informal – order products in advance of the pilgrim's influx, city administrators spruce up urban infrastructure, all of which *create economic value*. At this stage, however, the potential environmental impact of the pilgrimages is not taken into consideration. We note *waste of value* in this regard, as the collaboration among stakeholders to prepare the event could also be leveraged to create environmental value and prevent its destruction.

During: Consuming the actual mega-event

During the pilgrimages, a rich spiritual and social atmosphere is in place: the millions of pilgrims are focused on their faith, which prompts them to walk for hours (e.g., 10h, 52km for Cirio de Nazare), whereas other stakeholders facilitate that focus through services and products (e.g., distributing/selling disposable water cups/bottles, flowers, religious images, playing music, offering medical services). Multiple types of *value are created* among stakeholders (see Table 1), but the environment is disadvantaged in the value dynamics at the stage. *Value is destructed* through the generation of post-consumption litter (millions of plastic bottles and cups are dropped on the floor during the pilgrimages main processions) and *wasted* given that most of the litter could be collected for recycling. The lack of connection between pilgrims and the natural environment that surrounds them is striking: while focusing on their connection to divinity, pilgrims disconnect from the material and, arguably, mundane aspects that support this event.

Post-event: Responding to the mega-event

After the mega-event, the city administration works with waste collection services, cooperatives of collectors of recyclable materials and independent collectors to clean up the streets. *Value is recovered* when these materials are sent to recycling centers. However, most of the litter still ends up at landfills. As pilgrims soon return to their homeplaces after the event, they are blind to the *value destruction* (and *waste*) in the post-consumption. Additionally, most pilgrims purchase multiple souvenirs to remind them of the spiritual mega-event. These are often cheap t-shirts, statues, or plastic items produced overseas, and shipped

across the globe to be sold at the pilgrimage location. Environmental value is destructed and wasted in this process.

Discussion

This research has a threefold contribution to marketing and consumer research. First, it adds to the literature on CMEs by identifying how these can simultaneously lead to value creation, destruction, waste, and recovery. Second, by focusing on the tensions between value creation and destruction in the context of CMEs, where atmospheres guide consumer behavior (Hill, Canniford, and Eckhardt 2021), and market and non-market logics intersect (Scaraboto and Figueiredo 2017), this research extends the understanding of value dynamics in non-mainstream, Latin American markets. Third, it offers relevant insights on how sustainable consumption can be encouraged and achieved in contexts that differ from routine and individual-based environments.

References

Abid, Muhammad Farrukh, Amjad Shamim, Zaheen Khan, and Imran Khan (2022), "Value creation or value destruction: Conceptualizing the experiential nature of value-in-use," Journal of Consumer Behaviour, 21(3), 583-601.

Acosta, Alberto (2019), O bem viver: uma oportunidade para imaginar outros mundos. Editora Elefante.

Arnould, Eric J. (2021), "Ontology and circulation: Towards an eco-economy of persons," Journal of Marketing Management, 1-27. https://10.1080/0267257X.2021.2000007

Arnould, Eric J., Adam Arvidsson, and Giana M. Eckhardt (2021), "Consumer collectives: A history and reflections on their future," Journal of the Association for Consumer Research, 6(4), 415-428.

Baldassarre, Brian, Giulia Calabretta, N. M. P. Bocken, and Tomasz Jaskiewicz (2017), "Bridging sustainable business model innovation and user-driven innovation: A process for sustainable value proposition design," Journal of Cleaner Production, 147(2017), 175-186.

Bruce, Helen L., Hugh N. Wilson, Emma K. Macdonald, and Beverly Clarke (2019), "Resource integration, value creation, and value destruction in collective consumption contexts," Journal of Business Research, 103, 173–185.

Chandy, Rajesh K., Gita Venkataramani Johar, Christine Moorman, and John H. Roberts (2021), "Better marketing for a better world," Journal of Marketing, 85(3), 1–9. https://doi.org/10.1177/00222429211003690

Conaway, Cameron (2015, February 14), "Rejuvenating the Ganges: bridging the gap between conservation and religion," in The Guardian. https://www.theguardian.com/global-development-professionals-network/2015/Jun/18/ganges-cleanup-conservation-religion-India

Cornelissen, Gert, Mario Pandelaere, Luk Warlop, and Siegfried Dewitte (2008), "Positive cueing: Promoting sustainable consumer behavior by cueing common environmental behaviors as environmental," International Journal of Research in Marketing, 25(1), 46-55. https://doi.org/10.1016/j.ijresmar.2007.06.002

Fetterman, David M. (1989), Ethnography: Step-by-step. Sage publications.

Hill, Tim, Robin Canniford, and Giana M. Eckhardt (2022), "The roar of the crowd: How interaction ritual chains create social atmospheres," Journal of Marketing, 86(3), 121-139.

Holbrook, Morris B. (1999), Consumer value: A framework for analysis and research. Routledge.

Husemann, Katharina C., and Giana M. Eckhardt (2019), "Consumer spirituality," Journal of Marketing Management, 35(5-6), 391-406. https://doi.org/10.1080/0267257X.2019.1588558

Mair, Judith, P. Monica Chien, Sarah Jane Kelly, and Stephanie Derrington (2023), "Social impacts of mega-events: A systematic narrative review and research agenda," Journal of Sustainable Tourism, 31(2), 538-560.

Neumeyer, Xaver, and Susana C. Santos (2018), "Sustainable business models, venture typologies, and entrepreneurial ecosystems: A social network perspective," Journal of Cleaner Production, 172, 4565-4579.

Plé, Loïc, and Rubén Chumpitaz Cáceres (2010), "Not always co-creation: introducing interactional co-destruction of value in service-dominant logic," Journal of Services Marketing, 24(6), 430-437.

Roche, M. (1994), "Mega-events and urban policy," Annals of Tourism Research, 21(1), 1-19.

Scaraboto, Daiane, and Bernardo Figueiredo (2017), "Holy Mary goes' round: Using object circulation to promote hybrid value regimes in alternative economies," Journal of Macromarketing, 37(2), 180-192.

Shinde, Kira N. (2007), "Pilgrimage and the environment: Challenges in a pilgrimage center," Current Issues in Tourism, 10(4), 343-365. https://doi.org/10.2167/cit259.0

Turner, Victor Witter, and Edith LB Turner (2011), Image and pilgrimage in Christian culture. Columbia University Press.

Van der Wal, A. J., F. Van Horen, and A. Grinstein (2018), "Temporal myopia in sustainable behavior under uncertainty," International Journal of Research in Marketing, 35(3), 378-393. https://doi.org/10.1016/j.ijresmar.2018.03.006

Wan, Shui Ki, and Haiyan Song (2019), "Economic impact assessment of mega-events in the United Kingdom and Brazil," Journal of Hospitality & Tourism Research, 43(7), 1044-1067.

Webster, George (November 9, 2011), "Holy cities face threat from polluting pilgrims," in CNN access in https://edition.cnn.com/2011/11/08/world/meast/hajj-pilgrimage-climate-change/index.html.

White, Katherine, Rishad Habib, and David J. Hardisty (2019), "How to SHIFT consumer behaviors to be more sustainable: A literature review and guiding framework," Journal of Marketing, 83(3), 22-49.

Table 3 - Value Dynamics vs Mega-event Stages

Value dynamics / **Mega-event stages**	**Value creation** The various benefits (e.g., hedonic, utilitarian, economic) people perceive in a consumption experience (Holbrook, 1999; Babin, Darden, & Griffin, 1994)	**Value destruction** A reduction in benefits caused by misuse of resources; when resource integration is deemed inappropriate or unexpected by one/more stakeholders (Plé & Cáceres, 2010)	**Value Waste** The neglecting of potential value creation that could have led to benefits for some or all stakeholders, but instead generates drawbacks. (Our definition)	**Value Recovery** The transformation of value waste into value creation through resource recovery, repurposing, and reintegration. (Our definition)
Preparation	Transcendental value Pilgrims, residents, and event organizers aspire for and get involved with the event's spiritual atmosphere even before it kicks-off. Economic value The organization of the event create jobs,	Environmental value Carbon footprint from pilgrims' travel to the pilgrimage destination.	Environmental value An opportunity lost to create awareness around the idea of an eco-CME from the very beginning. Social value The event could be a catalyst for social change, but it falls short to	

	generate profit for those involved. It also boosts the local market, which equips itself (with products and services). Linking value Stakeholders co-organize the event for the benefit of the Church and pilgrims.		engage this value at this stage of the experience's organization. Linking value The stakeholders do not take advantage of their combined abilities to co-organize an eco-CME.	
	Linking value Stakeholders co-organize the event for the benefit of the Church and pilgrims		Linking value The stakeholders do not take advantage of their combined abilities to co-organized an eco CCE	
During	Economic value Stakeholders such as the Church, Government entities, companies,	Environmental value The outstanding amount of waste generated. The noise produced by fireworks.	Environmental value Recyclables materials collectors are at the disposal of the event, yet	

	sponsors, street vendors gain economically from the event. Spiritual value Pilgrims live a highly spiritual experience through bodily rituals of thanking and asking for blessings. Cultural value Local gastronomy and artistic expressions are incentivized. Linking value The impact of the collaboration between stakeholders' (e.g., church, army, red cross, etc.) is recognized and valued.		their workforce is neglected due to lack of time and resources to properly collect the entirety of waste produced. Nature-Humans value The opportunity to create moments of reflection of the inextricable and forgotten bonds between nature-human is missed. Other non(economic) value Several opportunities are missed to integrate degrowth-oriented activities.	

Post-event		Environmental value The mismanagement of recyclable, thus valuable, waste from the experience to landfills which pollutes nature (e.g., rivers, forest, etc.). Economic value Recyclables materials collectors fall short to generate economic value when the majority of the valuable materials is shipped to dumping grounds.	Environmental value As pilgrims soon return to their homeplaces after the event, they are blind to the value destruction (and waste) in the post-experience.	Environmental value Recyclables materials collectors scavenge for recyclable materials scattered on the streets or in landfills to sell them as a final attempt.

Vernacularization: Exoticism or Empowerment?

Saurabh Shinde

Krishanu Rakshit

India's digital revolution has been widely celebrated for its potential to democratize media production and consumption, breaking down traditional barriers to entry and enabling marginalized voices to reach wider audiences (Prasad 2021). However, this democratization is not without its contradictions. While digital platforms have ostensibly leveled the playing field, they have also created and perpetuated new forms of inequality, particularly in the realm of vernacular journalism. We explore these dynamics through the case of *Khabar Lahariya* (literally "News Waves"), a pioneering, women-run, rural news organization that has been operational for over two decades. Describing itself as "the country's only women-run brand of ethical and independent rural news," ("Khabar Lahariya - Our Flagship" n.d.) the team and brand garnered significant acclaim from various prestigious institutions. Yet, the organization struggles to gain sustained traction in the attention-driven digital news economy (Fengler and Ruß-Mohl 2008; Smith and Fischer 2021). Using Pierre Bourdieu's (1986, 1987) practice theory framework of capital, *habitus*, and field we seeks to unravel the paradoxes embedded in Khabar Lahariya's journey and, by extension, the broader field of Hindi vernacular journalism.

The field of Indian journalism has long been shaped by its colonial legacy, which institutionalized a hierarchy of languages and identities. English-language journalism, dominated by urban, graduate, and predominantly male professionals, continues to occupy the highest echelons of status and legitimacy. In contrast, vernacular journalism, though often surpassing English media in terms of circulation and television ratings (TRPs), is relegated to a lower rung in the status and credibility hierarchy (Chadha 2017; Cody 2018; Neyazi 2011, 2014). This structural inequality is further compounded by gender and geography, as rural women journalists face dual marginalization in a field already skewed toward urban, male voices (Nazir 2021). Khabar Lahariya, as a hyperlocal, rural, and entirely women-run initiative, embodies these intersecting inequalities. Its struggle for recognition and legitimacy is emblematic of the broader challenges faced by vernacular journalism in India.

The advent of digital media promised to disrupt these entrenched hierarchies by democratizing access to production and distribution. For Khabar Lahariya, digital platforms opened new avenues for visibility and audience engagement, allowing the organization to transcend the institutional barriers that had previously constrained its reach. The project

gained widespread recognition, with its journalists celebrated for their courage, their use of "sweet" and "raw" language, and their "authentic" portrayal of rural India. However, a closer examination reveals a more nuanced and troubling reality. While they produce content with frequency at par with other popular digital news channels, their digital engagement metrics – likes, shares, subscriptions, and views – remain disproportionately low. Moreover, the accolades it receives often emphasize its novelty as a women-run rural initiative rather than its journalistic rigor or news value. This raises critical questions about the nature of recognition in the digital age: Is Khabar Lahariya being celebrated for its journalistic contributions, or is it being tokenized as a symbol of empowerment and authenticity?

Bourdieu's concept of capital provides a useful lens for understanding these dynamics. In the field of Indian journalism, cultural capital – embodied in formal education, fluency in English, and urban sophistication – remains a key determinant of status and legitimacy. Khabar Lahariya, with its rural, vernacular, and women-centric identity, operates at a deficit of this cultural capital. While the organization has accumulated significant symbolic capital through awards and media coverage, this recognition is for their 'exotic' value than the contribution to the field journalism. This reinforces the brand's marginal position rather than elevating its journalistic standing. The digital attention economy, with its emphasis on virality and spectacle, further exacerbates these inequalities. Khabar Lahariya's content, though deeply rooted in the realities of rural India, struggles to compete with the sensationalism and urban-centric narratives that dominate digital platforms.

To add to the complexity, the content creation practices of Khabar Lahariya's journalists are grounded in their rural and vernacular *habitus*, that manifests through storytelling techniques, linguistic choices, and thematic focus, which are distinct from the practices of mainstream, urban-centric media. For instance, their reporting often employs a conversational and colloquial tone, reflecting the everyday language of their rural audiences. Their narratives are deeply embedded in the local context, addressing issues such as caste discrimination, gender-based violence, and agrarian crises, which are frequently overlooked by mainstream media. On the one hand, it is the source of Khabar Lahariya's distinctiveness and its ability to connect with its target audience. On the other hand, it limits the organization's capacity to adopt the practices of mainstream journalism, which are often seen as benchmarks of professionalism and legitimacy.

The digital attention economy exacerbates this dilemma. In a landscape driven by metrics such as views, likes, and shares, Khabar Lahariya's hyperlocal and vernacular content often fails to compete with the sensationalism and urban-centric narratives that dominate digital platforms. While the organization's journalists remain committed to their mission of representing rural realities, this commitment comes at the cost of limited visibility and engagement in the digital space. This raises critical questions about the trade-offs involved in maintaining authenticity versus pursuing broader reach and recognition.

We argue that the digital revolution, while expanding access, has not fundamentally altered the hierarchies of the journalistic field. Instead, it has introduced new mechanisms of exclusion, where marginalized voices are celebrated for their difference but rarely accorded the same legitimacy as their mainstream counterparts. Through a netnographic analysis spanning over four years, we highlight the tensions between Khabar Lahariya's symbolic success and its material struggles, offering insights into the broader challenges of achieving equity in the digital media landscape. By interrogating the dynamics of capital within the field of Hindi vernacular journalism, this research contributes to ongoing debates about media democratization, representation, and the social reproduction in the digital age.

References

Bourdieu, Pierre (1986), "The forms of capital," in *Handbook of theory and research for the sociology of education*, J. G. Richardson, ed., Westport, Connecticut: Greenwood Press, Inc.

Bourdieu, Pierre (1987), *Distinction: a social critique of the judgement of taste*, (R. Nice, tran.), Cambridge, Mass: Harvard Univ. Press.

Chadha, Kalyani (2017), "The Indian news media industry: Structural trends and journalistic implications," *Global Media and Communication*, 13 (2), 139–56.

Cody, Francis (2018), "How is Multilingual Freelance Journalism Transforming the Media Landscape in India?"

Fengler, Susanne and Stephan Ruß-Mohl (2008), "Journalists and the information-attention markets: Towards an economic theory of journalism," *Journalism*, 9 (6), 667–90.

"Khabar Lahariya - Our Flagship" (n.d.), *Chambal Media*, (accessed February 14, 2025), [available at https://chambalmedia.com/khabar-lahariya/].

Nazir, Tashafi (2021), "Gender Gap In Media! Number Of Women Journalists On Decline In India, Says Study," (accessed September 15, 2022), [available at

https://thelogicalindian.com/gender/gender-gap-in-media-number-of-women-journalists-on-decline-in-india-says-study-31416].

Neyazi, Taberez Ahmed (2011), "Politics after Vernacularisation: Hindi Media and Indian Democracy," *Economic and Political Weekly*, 46 (10), 75–82.

Neyazi, Taberez Ahmed (2014), "Media, Mediation and the Vernacular Public Arena in India," *Media International Australia*, 152 (1), 176–84.

Prasad, Revati (2021), "Digital disruption? Journalism startups in India," *Journalism*, 22 (8), 2122–38.

Smith, Andrew N. and Eileen Fischer (2021), "Pay attention, please! Person brand building in organized online attention economies," *Journal of the Academy of Marketing Science*, 49 (2), 258–79.

Whose responsibility is overconsumption?

Pia Polsa

While some studies ask if consumers are victims or free agents of their choices (Cherrier and Murray 2004) other more recent studies investigate responsibilization of consumers for ethics of their consumption behavior (Coffin and Egan-Wyer 2022; Giesler and Veresiu 2014). According to Giesler and Veresiu (2014) consumers are responsibilitised, i.e. they are blamed for their unsustainable consumer behavior while Coffin and Egan-Wyer (2022) state that market structures make consumers to act unethically despite their sustainable attitudes. Cherrier and Murray (2024) suggest massification, commodification and domination to be some societal structures that limit consumers. But what other structures does marketing literature cover that lead to overconsumption away from sustainable choices? This paper reviews marketing literature on sustainability and seeks to answer following research questions: 1) how does marketing research conceptualize structural overconsumption? 2) who is responsibilitised in marketing literature for sustainability?

References

Cherrier, H. and Murray, J.B. (2004). The sociology of consumption: the hidden facet of marketing, *Journal of Marketing Management*, Vol. 20, 509-525.

Coffin, J. and Egan-Wyer, C. (2022). The ethical consumption cap and mean market morality, *Marketing Theory*, Vol. 22(1) 105–123.

Giesler, M. and Ela Veresiu, E. (2014). Creating the Responsible Consumer: Moralistic Governance Regimes and Consumer Subjectivity, *Journal of Consumer Research*, Vol. 41(3), 840–857.

Why Do People Live Alone Around the World? A Study on Sociodemographic Variables and Cultural Dimensions That Explain This Phenomenon.

Pedro Paulo Santos Cavalcante

Miguel al Behy Kanaan Coelho

Evandro Luiz Lopes

Suzane Strehlau

Vivian Iara Strehlau

Eduardo Mesquita

Abstract

This study aims to analyze the sociodemographic variables and Hofstede's cultural dimensions that explain the phenomenon of single-person households globally. To understand this phenomenon, three studies were conducted. In the first study, a Linear Regression was applied to a dataset created with secondary data, composed of sociodemographic variables. In the second study, a linear regression was performed with Hofstede's cultural dimensions. In the third and final study, an optimized model was created using the variables from the previous studies that best explained the phenomenon. As a result, the model developed in the study managed to explain approximately 85% of the single-person households in the sample. The study suggests that countries with lower power distance and more feminine societies tend to have more single-person households. Conversely, cultures with high power distance and masculine values reinforce traditional roles, limiting the formation of such households. The article advances the literature by demonstrating that sociodemographic variables and cultural dimensions can better explain the phenomenon of single-person households, challenging the prevailing literature, which considered this a phenomenon of high-income per capita countries. Recommendations for future studies are provided at the end of the article.

Keywords: Culture and Consumption, Hofstede, Household Arrangements, Family, and Single-Person Households.

Introduction

It is estimated that by 2030, approximately 40% of households in OECD countries will consist of people living alone (OECD, 2019b). Single-person households have entered the list of the ten major demographic trends of humanity (Euromonitor, 2020). In Japan (National

Institute of Population, 2018) and the European Union (Eurostat, 2018), approximately 36% and 35%, respectively, of all households consist of single-person dwellings. However, contrary to what the literature suggests, that this is an exclusive phenomenon of high-income countries (Mihalopoulos et al., 2021; Ospina, 2020; Vespa, 2017; Ogden & Hall, 2000; OECD, 2019), data indicate that this phenomenon seems to be advancing globally.

In 2022, approximately 19% of Brazilian households consisted of people living alone (IBGE, 2023). According to Ullmann & Rico (2014), single-person households are already the third-largest type of household composition in Latin America (CEPAL, 2010). In 2024, a study analyzed sociodemographic variables from 123 countries to identify those that best explained the global phenomenon of single-person households. According to Cavalcante et al. (2022), variables such as Gender Inequality, Life Expectancy, HDI, and GDP per capita explained approximately 65% of the global model. However, when religion was included as a variable, the model managed to explain nearly 70% of the sample (Cavalcante et al., 2022).

All these studies highlight the need to analyze not only economic and social variables but also cultural dimensions of countries. In light of this, the present study focused on understanding which sociodemographic variables and cultural dimensions best explain the phenomenon of single-person households worldwide. To achieve this, multiple linear regressions were conducted across three independent studies. In the first study, a linear regression was applied to a secondary database created for this research, composed of sociodemographic variables. In the second study, a linear regression was performed using Hofstede's cultural dimensions. In the third and final study, the model was optimized by incorporating the variables from both previous studies that best explained the phenomenon.

The study's results indicate that countries with lower power distance and more feminine societal values show a higher prevalence of single-person households. Conversely, cultures characterized by high power distance and masculine values tend to reinforce traditional roles, hindering the formation of such households. This article advances the literature by demonstrating that sociodemographic variables and cultural dimensions explain the phenomenon of single-person households better than purely socioeconomic variables (Mihalopoulos et al., 2021; Ospina, 2020; European Commission, 2018; Vespa, 2017; Ogden & Hall, 2000; OECD, 2019; IBGE, 2010).

This article is organized as follows: the next section presents the theoretical review of the Theory of Demographic Transitions and the Family Life Cycle, followed by a discussion of

Cultural Dimension Scales, and finally an exploration of the concept of Single-Person Households. Subsequently, we detail the methodological choices guiding the investigation. The penultimate section discusses the results, and the final section presents the conclusions, along with implications, limitations, and suggestions for future research.

Literature review

For the theoretical foundation of this study, no literature was found that combined, in a single research, the Theory of Demographic Transitions and the Family Life Cycle, Cultural Dimension Scales, and the Concept of Single-Person Households. Therefore, these three themes were addressed separately, and their intersection was explored in the analysis and discussion sections.

Theory of Demographic Transitions and the Family Life Cycle

The Theory of Demographic Transitions and the Household Life Cycle a valuable theoretical foundation for understanding social phenomena related to the increase in single-person households. The connection between population and development has been a central theme in the social sciences (Brito, 2007).

The First Demographic Transition (FDT), which occurred during the Industrial Revolution until the end of World War II, led to significant changes in living conditions. Urbanization and improved sanitation in major cities resulted in decreased mortality and fertility rates and increased life expectancy, shaping the context for subsequent demographic transitions (Lesthaeghe, 1991). This transition also influenced family structure, giving rise to a new configuration of the family life cycle, with a growing focus on the relationship between individual life cycles, financial situations, and consumption patterns (Rowntree, 1902; Wells & Gubar, 1966; Piekut, 2020).

In the context of the Second Demographic Transition (SDT), proposed by Van de Kaa (1987), the increase in cohabitation, changes in marriage and parenthood patterns, and the diversification of family and household arrangements indicate an evolution in traditional family structures. Concurrently, the evolution of the family life cycle from the 1970s onward considered the growing presence of individuals living alone, reflecting changes in social preferences and possibilities (Murphy & Staples, 1979).

The latest theory of demographic transition, referred to as the Third Demographic Transition (TDT), coined by Coleman (2006), is associated with low fertility rates and high immigration. Alongside this demographic theory, the family life cycle theory was reinterpreted by Therborn (2004), who emphasized the interaction of sex, gender, and family as determining factors in household configurations. The combination of these variables, within the context of demographic transitions, provides a more comprehensive explanation of the growing phenomenon of single-person households.

Cultural Dimensions and Hofstede's Scale

In the second half of the 20th century, with the early outlines of what would become globalization, one of the first studies addressing cultural dimensions across nations was Hill's study (1959). He developed the concept of high-context and low-context communication to explain how explicit the degree of transmitted information is (Muratore et al., 2024; Nishimura, 2008; Nguyen et al., 2007).

Deepening these studies, Hofstede developed, around the 1980s, a scale to measure cultural dimensions across countries through four dimensions: Power Distance, Individualism vs. Collectivism, Masculinity vs. Femininity, and Uncertainty Avoidance (Żemojtel-Piotrowska & Piotrowski, 2023; Soares et al., 2007). Hofstede continued expanding his research, adding dimensions such as Long-Term Orientation and Indulgence vs. Restraint in later studies (Hofstede et al., 2010).

In the 1990s, two other scales emerged: Schwartz's and Trompenaars's scales. Schwartz's scale is based on 10 universal motivational values organized into two main axes: Openness to Change vs. Conservation and Self-Enhancement vs. Self-Transcendence (Schwartz, 2021). Trompenaars's scale, on the other hand, includes seven dimensions: Universalism vs. Particularism, Individualism vs. Communitarianism, Specific vs. Diffuse, Neutral vs. Affective, Achievement vs. Ascription, Sequential Time vs. Synchronous Time, and Internal Direction vs. External Direction (Woolliams & Trompenaars, 2024; Lacerda, 2011).

Table 2 details the main characteristics of Hofstede's, Schwartz's, and Trompenaars's scales, their primary dimensions, and the positive and negative aspects of each scale.

Scale	Main Dimensions	Positive Aspects	Negative Aspects
Hofstede	. Power Distance . Individualism vs. Collectivism . Masculinity vs. Femininity . Uncertainty Avoidance . Long-Term vs. Short-Term Orientation . Indulgence vs. Restraint	. Applicable to various contexts (business, politics, society) . Based on global empirical data . Focus on observable cultural behaviors	. Initial focus on corporate environment (IBM), with limitations in extrapolation to all cultural contexts . Simplicity may disregard cultural nuances
Schwartz	. Openness to Change vs. Conservatism . Self-enhancement vs. Self-transcendence	. Identifies universal human motivations . Widely used in psychology and sociology studies . Allows for comparative analyses across cultures and values	. Abstract theoretical scope, less connected to specific behaviors . May be more difficult to operationalize in practical studies.
Trompenaars	. Universalism vs. particularism . Individualism vs. communitarianism . Specific vs. diffuse . Neutral vs. affective . Achievement vs. attribution . Sequential vs. synchronous time	. Focus on organizational and business dynamics . Useful for understanding cultural interactions at work . Provides nuances of interpersonal interaction in specific situations	. Less applicable to general societal contexts . Focus limited to corporate environments and formal relationship.

	. Internal direction vs. external direction

Source: The autors, 2025.

As shown in Table 2, the scales have distinct characteristics and should be used according to the object of study. While Hofstede's scale stands out for its practical applicability and its ability to capture nuances between individual and social values (Żemojtel-Piotrowska & Piotrowski, 2023; Hofstede et al., 2010; Soares et al., 2007), Schwartz's scale offers a broad understanding of human values (Schwartz, 2021), and Trompenaars's scale is ideal for organizational dynamics and cultural aspects in corporate environments (Woolliams & Trompenaars, 2024; Lacerda, 2011). Considering the objective of this study, which is to understand the sociocultural influences on single-person households, Hofstede's scale will be employed, given its methodological robustness and alignment with the topic.

Concept of Single-Person Households

Although statistical agencies adopt different criteria for classifying households and residents—some use the number of people living in a household, while others consider the number of family members residing in a home—they share a common classification for single-person households: homes inhabited by only one person (CEPAL, 2010; IBGE, 2010; OECD, 2019b; European Commission, 2018).

According to IBGE (2010), these households include young adults who have moved out of their parents' homes, divorced individuals, or widows and widowers. Despite being classified solely based on the presence of a single person in the household, single-person households are composed of individuals at various life stages, with differing conditions related to age, marital status, and income, representing a heterogeneous group with diverse needs. Additionally, living alone does not necessarily imply social isolation, as highlighted by CEPAL (2010), which notes that these individuals often maintain ties with a broad social network, including family, friends, coworkers, and neighbors.

Singles (2008) emphasizes a significant distinction between living alone and being single or divorced, as a single person may share an apartment (Pu & Zhang, 2020; Jain & Kapoor, 2013; Thompson, 2013), and spouses may also reside in separate places (Sameer, 2024; Abbasi-Shavazi et al., 2018; Ambrosini, 2015). Furthermore, scenarios such as divorced

individuals living alone during the week and hosting their children on weekends exemplify the porous and nuanced nature of this arrangement. Even while living alone, these individuals may navigate other family arrangements (Berggren & Trägårdh, 2022; Singles, 2008).

This population is fluid, as described by Barrón (2002), with multiple pathways for entry—such as marital breakups, separations related to migration, professions that prevent marital cohabitation, or personal choices to form a single-person household—and for exit, such as returning to marital cohabitation, the reunification of immigrant spouses, or the reintegration of absent parents due to work, imprisonment, or hospitalization, among other circumstances.

Method

This quantitative exploratory research consisted of seven phases, divided into three studies. The study sample included 55 countries distributed across the five continents. Figure 1 illustrates the geographical distribution of the countries by continent, and Table 3 presents the list of countries.

Figure 1. Geographical distribution of the sample countries by continent.



Source: The autors, 2025.

Table 3. List of sample countries by region

Region	Countries
Africa	Morroco
Américas	Argentina, Brazil, Canada, Chile, Colombia, El Salvador, Mexico, Peru, Trinidad and Tobago, United States and Uruguay
Asia	Bangladesh, China, India, Indonesia, Japan, Malaysia, Pakistan, Philippines, Singapore, Thailand and Turkey
Europe	Austria, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland and United Kingdom
Oceania	Australia and New Zeland

Source: The autors, 2025.

Given that this research was conducted exclusively with secondary data, one of the main inclusion and exclusion criteria for countries to be eligible for inclusion in the sample was that the data were available in open databases. Table 4 shows all the sociodemographic variables and cultural dimensions of the Hofstede scale that were taken into consideration, as well as their respective codes and definitions.

Table 4. Name of the sociodemographic variables and cultural dimensions of the Hofstede scale, code and definition.

Variable		Definition
Share of one-person households	Code	Percentage of single-person households over the total number of households in a country
Gender Inequality Index	GII	Reflects gender-based inequalities in three dimensions – reproductive health, autonomy and economic activity (UN, 2022)
Human Development Index	IDH	Index is composed of three pillars: health, education and income
Per Capita Income	GDPPC	Ratio between GDP and total population
Education Index	EI	Average of the average years of schooling (for adults) and the expected years of schooling (for children), both expressed as an index obtained by scaling with the corresponding maximums
Life Expectancy at Birth	LE	Male and female life expectancy at birth
Unemployment Rate	UR	Percentage of economically active people who are not formally employed and are looking for work
Fertility Rate	FR	Estimate of the average number of children a woman has throughout her life
Power Distance	pdi	Refers to the hierarchical power distance of the country, based on its culture.
Individualism vs. Collectivism	idv	Refers to the degree of individualism of the population of a country and its culture.
Masculinity vs. Femininity	mas	Analyzes whether the country's culture is more masculine or feminine-oriented. Refers to the degree of uncertainty avoidance in a culture.
Uncertainty Avoidance	uai	Refers to whether a culture has more long-term or short-term planning and thinking.

Long-Term vs. Short-Term Orientation	ltwvs	Refers to the degree of indulgent (vs. restrictive) behavior in a culture.
Indulgence vs. Restraint	-	Percentage of single-person households over the total number of households in a country

Source: The autors, 2025.

The exclusion criteria for removing a country from the sample were primarily based on the absence of data for the mentioned variables in public databases. Once the sociodemographic and cultural dimensions data were collected, and countries lacking open data were excluded, the study sample totaled 55 countries. The sample proved to be highly representative, particularly given that the population of the selected countries represents approximately 68% of the global population (Worldometer, 2024).

As shown in Table 5, the relationship between the sample population and the total population by continent was analyzed. The sample represented over 75% of the populations in Europe, Asia, and the Americas. It accounted for approximately 59% of the population in Oceania and 3% of the population in Africa. The following section details the methodological steps adopted in each study.

Table 5. Total population by region and globally, compared with the population represented in the sample.

Region	Total Population	Populacion of the sample	% of Sample Population to Total Population
Oceania	54.120.000	31.980.000	59%
África	1.534.220.000	38.540.000	3%
Asia	4.801.920.000	4.038.500.000	84%
Américas	1.056.160.000	896.260.000	85%
Europa	738.000.000	553.000.000	75%
Mundo	**8.200.000.000**	**5.558.280.000**	**68%**

Source: **Worldometer** (www.Worldometers.info), 2024

First Study

For the first study, a secondary database was created, composed of sociodemographic variables provided by the United Nations (UN) and the World Bank (WB). After extracting and processing the data, a dataset with *n=55* observations was obtained. The values for the variables were extracted at the country level and calculated for aggregate levels.

The selection of independent variables was based on the literature on demographic transitions and the family life cycle, which suggest possible causes for the increase in single-person households worldwide. For *Per Capita Income* (GDPPC), *Human Development Index* (HDI), and *Unemployment Rate* (UR), we relied on studies by OECD (2019), IBGE (2010), ECLAC (2006), and Ospina (2020). For *Life Expectancy at Birth* (LE) and *Fertility Rate* (FR), we relied on the European Commission (2018), Van de Kaa (1987), Murphy and Staples (1979), and Ospina (2020). For the *Education Index* (EI), we referenced Vesta (2017), OECD (2019), and the European Commission (2018). Finally, the independent variable *Gender Inequality Index* (GII) was selected based on Therborn (2004), Van de Kaa (1987), and Coleman (2006). Table 4 presents all the sociodemographic variables, their respective codes, and definitions.

The first study used the multiple linear regression technique, considering that although the variables are metric, they do not follow a normal distribution. The *Jamovi* software was employed as the analytical tool, with the adoption of a standard statistical significance level of 5% for validating the results (Hair et al., 2009).

Second Study

In the second study, a linear regression was conducted using the dimensions of Hofstede's scale. Data were collected from the consultancy website GeertHofstede.com, and countries lacking data for one or more dimensions were excluded. After data mining, the sample size was reduced to 55 countries. Following this geographic distribution, a multiple linear regression was performed using the dimensions: *Power Distance*, *Individualism vs. Collectivism*, *Masculinity vs. Femininity*, *Uncertainty Avoidance*, and *Long-Term Orientation vs. Short-Term Orientation*.

The second study employed the multiple linear regression technique, given that the test includes six predictor variables and only one response variable. However, in this case, the distribution of the multiple linear regression was normal (Shapiro-Wilk's $p < 0.01$). The *Jamovi* software was used as the analytical tool, with a standard statistical significance level of 5% adopted for validating the results (Hair et al., 2009).

Third Study

In the third and final study, an optimized model was created using the variables from the first and second studies that most explained the phenomenon of single-person households

worldwide. In the first study, the sociodemographic variables that most explained the model were: Gender Inequality and Life Expectancy. In the second study, the Hofstede dimensions with the highest R2 were: Power Distance, Collectivism, and Masculinity. In addition to presenting a higher R2 than the first study, the second study shows that as the Hofstede dimension variables were incorporated, the model became better explained.

Therefore, the third study utilized the multiple linear regression technique, as six predictor variables and only one response variable were tested. This time, only the variables mentioned above were used, including the sociodemographic variable of Gender Inequality. The *Jamovi* software was used as the tool, with a typical 5% statistical significance level adopted for validating the results (Hair et al., 2009).

In Table 6, a detailed description of each phase of the article is provided, including the approach taken and the main activities carried out.

Timeline	Approach	Key Activities
Phase 1	Literature Review	. Literature Review; . Selection of sociodemographic variables; . Preparation of the database of different international organizations.
Phase 2	Multiple Linear Regression (Study 1)	. Application of the Linear Regression technique; . Interpretation of Results.
Phase 3	Cultural Dimension Scale	. Literature Review on cultural dimensions. . Selection of the cultural dimension scale;
Phase 4	Multiple Linear Regression (Study 2)	. Preparation of the Hofstede database. . Application of the Linear Regression technique; . Interpretation of Results.
Phase 5	Variable Optimization	. Selection of the sociodemographic variables and cultural dimensions that best explain the model.
Phase 6	Multiple Linear Regression (Study 3)	. Application of the Linear Regression technique; . Interpretation of Results.
Phase 7	Results and Conclusions	. Literature Review;

Source: The autors, 2025.

Results

In this section, the main findings of the empirical phase of this research will be presented, where the models that explain the phenomenon of single-person households worldwide were grouped into three categories: Sociodemographic Variables, Cultural Dimensions of Hofstede's Scale, and Optimized Model – Sociodemographic Variables and Cultural Dimensions of Hofstede's Scale.

Sociodemographic Variables

As a result, as shown in Table 1, the sociodemographic variables Gender Inequality, Education, and HDI had a strong correlation with the percentage of people living alone worldwide. Meanwhile, the variables Life Expectancy, Per Capita Income, and Fertility had a moderate correlation, around 0.6. Among the analyzed variables, Gender Inequality and Fertility had a negative correlation with the percentage of people living alone worldwide, meaning that the higher the gender inequality or fertility, the fewer people living alone, and vice versa.

Table 1. Correlation matrix of sociodemographic variables.

	Share of one person households	Gender Inequality Index (2018)	Life expectancy at birth, total (years) (2019)	Education Index (2019)	IDH (2018)	GDPPC_PPP (2020)	Fertility_rate (2020)
Share of one person households	—						
Gender Inequality Index (2018)	-0.825 ***	—					
Life expectancy at birth, total (years) (2019)	0.650 ***	-0.847 ***	—				
Education Index (2019)	0.819 ***	-0.865 ***	0.777 ***	—			
IDH (2018)	0.816 ***	-0.923 ***	0.884 ***	0.963 ***	—		
GDPPC_PPP (2020)	0.614 ***	-0.747 ***	0.733 ***	0.678 ***	0.793 ***	—	
Fertility_rate (2020)	-0.603 ***	0.756 ***	-0.741 ***	-0.697 ***	-0.759 ***	-0.566 ***	—

Nota. * p < .05, ** p < .01, *** p < .001

Source: The autors, 2025.

Once the correlation matrix was done and the variables that most correlated with the percentage of single-person households were understood, the Stepwise method was used

with two objectives. The first objective was the creation of models to calculate the coefficient of the sociodemographic variables, with the intention of understanding the p-value and intercept of these variables that most explained the phenomenon of single-person households. The second objective was the creation of a regression with the variables used in the models from the first objective.

The study created three models, where the coefficient of the Regression Model and the effect of the variables on the Percentage of Single-Person Households were analyzed. In Model 1, only the Gender Inequality variable was considered. In the second model, the variables Gender Inequality and Life Expectancy were considered. In the third and final model, the variables Gender Inequality, Life Expectancy, and Education were considered.

As can be seen in Tables 2, 3, and 4, although the data presented from Model 1 to Model 2 show a worsening in the fit and explanation of the response variable (Share of one-person households), the data from Model 3 demonstrate a significant explanation for the percentage of people living alone, revealing that sociodemographic variables can explain the phenomenon of people living alone in each country (F (1, 51) = 10.32; DR2 = 0.052; p = 0.002).

Table 2. Model 1 – Coefficient of the Regression Model and the effect of the Gender Inequality Index on the Percentage of Single-Person Households."

Predictor	Estimatives	Standard Error	t	P	Standard Estimates
Intercepto	37.9	1.60	23.7	< .001	
Gender Inequality Index (2018)	-67.3	6.33	-10.6	< .001	-0.825

Source: The authors, 2025.

Table 3. Model 2 – Coefficient of the Regression Model and the effect of the Gender Inequality Index and Life Expectancy on the Percentage of Single-Person Households.

Predictor	Estimatives	Standard Error		P	Standard Estimates
Intercepto	82.379	37.519	.20	.033	
Gender Inequality Index (2018)	-79.277	11.882	6.67	.001	-0.971
Life expectancy at birth, total (years) (2019)	-0.535	0.451	1.19	.241	-0.173

Source: The authors, 2025.

Table 4. Model 3 – Coefficient of the Regression Model and the effect of the Gender Inequality Index, Life Expectancy and Education on the Percentage of Single-Person Households.

Predictor	Estimatives	Standard Error		Standard Estimates	
Intercepto	56.952	35.446	1.61	0.114	
Gender Inequality Index (2018)	-51.654	13.916	-3.71	< .001	0.633
Life expectancy at birth, total (years) (2019)	-0.759	0.421	-1.80	0.077	0.245
Education Index (2019)	46.898	14.599	3.21	0.002	.462

Predictor	Estimatives	Standard Error	Standard Estimates

Source: The authors, 2025.

After the models were finalized, linear regressions of Models 1, 2, and 3 were conducted. As shown in Table 5, the sociodemographic variables are correlated with the percentage of people living alone, explaining 72% of all single-person households in the study sample (F (3, 51) = 48.8; R2 = 0.72; p < 0.001). The Gender Inequality variable (Gender Inequality Index) is negatively related to the percentage of people living alone (Share of one person households) (b = -0.63; p < 0.001), while life expectancy at birth (Life expectancy at birth) is also marginally negatively related to the percentage of people living alone (b = -0.24; p = 0.077), and the Education Index is positively related to the percentage of people living alone (b = 0.46; p = 0.002).

Table 5. Linear Regression of Models 1, 2, and 3 to explain the percentage of single-person households with sociodemographic variables

				Global Model Test			
Model	R	R^2	R^2 Adjusted	F	gl1	gl2	p
	0.825	0.681	0.675	113.0		3	< .001
	0.861	0.741	0.731	74.5		2	< .001
	0.876	0.767	0.754	56.1		1	< .001
	0.885	0.783	0.765	45.0		0	< .001

Model	R	R^2	R^2 Adjusted	Global Model Test			
				F	gl1	gl2	p
	0.901	0.812	0.793	42.4		9	< .001
	0.920	0.847	0.828	44.4		8	< .001

Source: The authors, 2025.

Cultural Dimensions of Hofstede's Scale

The cultural dimensions of Hofstede's scale are composed of six variables: Power Distance; Individualism vs. Collectivism; Masculinity vs. Femininity; Uncertainty Avoidance; Long-Term vs. Short-Term Orientation; and Indulgence vs. Restraint. In the model proposed in our study, five variables showed statistical significance in explaining the phenomenon of one-person households, with only the variable Indulgence vs. Restraint being statistically irrelevant and thus not considered in the model.

Just as we did with the sociodemographic variables, we also calculated collinearity within the cultural dimensions of Hofstede's scale. As shown in the collinearity statistics in Table 6, the dimensions do not have internal collinearity.

Table 6. Collinearity Statistics of Hofstede's Proposed Cultural Dimensions.

Dimension	VIF	Tolerace
Power Distance	1.95	0.513
Individualism	1.98	0.504
Masculine	1.09	0.918
Uncertainty Avoidance	1.07	0.932

Dimension	VIF	Tolerace
Long-Term Orientation	1.08	0.930

Source: The authors, 2025.

Analyzing the coefficient of the cultural dimensions proposed by Hofstade, on the percentage of single-person households, as can be seen in Table 7, associated with the result of the collinearity statistics, it is clear that the data are homogeneous and normal, in addition, there is no presence of multicollinearity (O'Brien, 2007), in accordance with the assumptions for linear regression.

Table 7. Coefficient of the model composed of the cultural dimensions proposed by Hofstade on the Percentage of Single-Person Households.

Predictor	Estimate	Standard Error	T	P
Intercept	11.364	5.7993	1.96	0.056
Power Distance	-0.201	0.0565	-3.56	< .001
Individualism	0.249	0.0510	4.88	< .001
Masculine	-0.137	0.0422	-3.24	0.002
Uncertainty Avoidance	0.126	0.0384	3.29	0.002
Long-Term Orientation	0.217	0.0421	5.15	< .001

Source: The authors, 2025.

In the linear regression of Hofstede's five dimensions, all five variables were tested and all were correlated with the percentage of people living alone, where the R2 was 0.76, as can be seen in Table 8. This means that 76% of all single-person households in the countries in our

sample can be explained by our proposed model, which is composed of five cultural dimensions from the Hofstede scale (R2 = 0.76; p < 0.001).

Table 8. Linear regression to explain the percentage of single-person households through Hofstede's cultural dimensions.

				Global Model Test			
Model	**R**	**R^2**	**R^2 Adjusted**	**F**	**gl1**	**gl2**	**P**
1	0.875	0.765	0.742	32.0	5	49	< .001

Source: The authors, 2025.

Optimized Model – Sociodemographic Variables and Hofstede's Cultural Dimensions

The optimized model of this study includes the five cultural dimensions of Hofstede's scale, which were discussed in the section above, along with the gender inequality variable, which was the variable that best explained the households of people living alone, from the perspective of sociodemographic variables. Following the methodological steps, the collinearity statistic of the optimized model showed that the variables do not have internal collinearity, as can be seen in Table 9.

Table 9. Collinearity Statistics of Hofstede's Proposed Cultural Dimensions Plus the Gender Inequality Variable.

Dimension	**VIF**	**Tolerance**
Gender Inequality Index (2018)	2.18	0.458
Power Distance	2.40	0.417
Individualism	2.05	0.488
Masculine	1.14	0.874

Dimension	VIF	Tolerance
Uncertainty Avoidance	1.09	0.917
Long-Term Orientation	1.36	0.737

Source: The authors, 2025.

After conducting tests with the sociodemographic variables, regressions were performed using Hofstede's cultural dimensions as predictor variables, along with the Gender Inequality variable. For this purpose, the Stepwise method was once again applied to demonstrate the changes in each model when including each variable. Initially, the assumptions for conducting a Multiple Linear Regression were verified (Hair, 2006), confirming the normality of the data (Shapiro-Wilk's $p > 0.05$). The data also showed no multicollinearity issues (O'Brien, 2007).

The study created six models in which the Regression Model coefficients and the effect of the variables on the Percentage of Single-Person Households were analyzed. In Model 1, only the Gender Inequality variable was considered, as shown in Table 10. In the second model, the Gender Inequality and Individualism variables were considered, as shown in Table 11. In the third model, the Gender Inequality, Individualism, and Power Distance variables were considered, as shown in Table 12.

In the fourth model, the variables considered were Gender Inequality, Individualism, Power Distance, and Masculinity, as shown in Table 13. In the fifth model, the variables considered were Gender Inequality, Individualism, Power Distance, Masculinity, and Uncertainty Avoidance, as shown in Table 14. In the sixth and final model, the variables considered were Gender Inequality, Individualism, Power Distance, Masculinity, Uncertainty Avoidance, and Long-Term Orientation, as shown in Table 15.

Table 10. Model 1 – Regression Model Coefficients and the Effect of the Gender Inequality Index on the Percentage of Single-Person Households.

Preditcor	Estimates	Standard Error	t	p	Standard Estimates		
Intercepto	37.9		1.60		23.7	< .001	
Gender Inequality Index (2018)	-67.3		6.33		-10.6	< .001	0.825

Source: The authors, 2025.

Table 11. Model 2 – Coefficient of the Regression Model and the effect of the Gender Inequality and Individualism Index on the Percentage of Single-Person Households.

Preditcor	Estimates	Standard Error	t	p	Standard Estimates
Intercepto	26.797	3.5071	7.64	< .001	
Gender Inequality Index (2018)	-51.633	7.3121	-7.06	< .001	-0.633
Individualism	0.163	0.0469	3.48	0.001	0.312

Source: The authors, 2025

Table 12. Model 3 – Coefficient of the Regression Model and the effect of the Gender Inequality Index, Individualism and Power Distance on the Percentage of Single-Person Households.

Preditcor	Estimates	Standard Error	t	p	Standard Estimates
Intercepto	36.472	5.2536	6.94	< .001	
Gender Inequality Index (2018)	-48.616	7.1130	-6.83	< .001	-0.596
Individualism	0.101	0.0519	1.95	0.057	0.193
Power Distance	-0.127	0.0531	-2.39	0.020	-0.217

Source: The authors, 2025.

Table 13. Model 4 – Coefficient of the Regression Model and the effect of the Gender Inequality Index, Individualism, Power Distance and Masculine on the Percentage of Single-Person Households.

Preditcor	Estimates	Standard Error	t	p	Standard Estimates
Intercepto	37.0501	5.1372	7.21	< .001	
Gender Inequality Index (2018)	-46.3496	7.0468	-6.58	< .001	-0.568
Individualism	0.1276	0.0526	2.42	0.019	0.244
Power Distance	-0.1018	0.0535	-1.90	0.063	-0.174
Masculine	-0.0765	0.0407	-1.88	0.066	-0.131

Source: The authors, 2025.

Table 14. Model 5 – Coefficient of the Regression Model and the effect of the Gender Inequality Index, Individualism, Power Distance, Masculine and Uncertainty Avoidance on the Percentage of Single-Person Households.

Preditcor	Estimates	Standard Error	t	p	Standard Estimates
Intercepto	29.7685	5.4885	5.42	< .001	
Gender Inequality Index (2018)	-44.6975	6.6425	-6.73	< .001	-0.548
Individualism	0.1524	0.0502	3.04	0.004	0.291
Power Distance	-0.1105	0.0503	-2.20	0.033	-0.189
Masculine	-0.0809	0.0383	-2.11	0.040	-0.138
Uncertainty Avoidance	0.0957	0.0344	2.78	0.008	0.179

Preditcor	Estimates	Standard Error	t	p	Standard Estimates

Source: The authors, 2025.

Table 15. Model 6 – Coefficient of the Regression Model and the effect of the Gender Inequality Index, Individualism, Power Distance, Masculine, Uncertainty Avoidance and Long-Term Orientation on the Percentage of Single-Person Households.

Preditcor	Estimates	Standard Error	t	p	Standard Estimates
Intercepto	23.7424	5.3238	4.46	< .001	
Gender Inequality Index (2018)	-34.4486	6.8001	-5.07	< .001	-0.422
Individualism	0.1527	0.0458	3.34	0.002	0.292
Power Distance	-0.1479	0.0472	-3.13	0.003	-0.253
Masculine	-0.0976	0.0352	-2.77	0.008	-0.167
Uncertainty Avoidance	0.1062	0.0316	3.36	0.002	0.198
Long-Term Orientation	0.1278	0.0386	3.31	0.002	0.218

Source: The authors, 2025.

When incorporating Hofstede's cultural dimensions, we observed a progressive improvement in the model, achieving satisfactory results for the study ($F(6,48) = 44.4$; $R^2 = 0.828$; $p < 0.001$). As previously tested with the sociodemographic data, Gender Inequality is inversely related to the percentage of people living alone ($\beta = -0.42$; $p < 0.001$). Individualism (IDV) has a direct relationship with the percentage of people living alone in each country ($\beta = 0.29$; $p = 0.002$), meaning that the more individualistic a country is according to Hofstede's dimensions, the more its population tends to live alone. Power Distance (PDI), on the other hand, is inversely related to the dependent variable ($\beta = -0.25$; $p = 0.003$), meaning that the greater the power distance, the less likely the population of a country is to live alone.

The same applies to the Masculinity variable (vs. Femininity), which is inversely related to the percentage of people living alone ($\beta = -0.16$; $p = 0.008$). This shows that more feminine countries (according to Hofstede's dimensions) tend to have a higher percentage of people living alone. The last two variables among Hofstede's cultural dimensions, Uncertainty Avoidance and Long-Term Orientation, are directly related to the percentage of people living alone (βuai = 0.19; $p = 0.002$) (βltowvs = 0.21; $p = 0.002$). This demonstrates that the more a population avoids uncertainty and the more long-term oriented it is, the more likely they are to live alone.

Finally, a multiple linear regression was conducted for each of the six models described above. As a result, Model 6, which is the optimization of Hofstede's five cultural dimensions along with the sociodemographic variable of Gender Inequality, showed the highest R^2, making it the model that best explains the phenomenon of single-person households. Model 6 presented an R^2 of 0.847, as shown in Table 16. This means that almost 85% of the single-person households in our sample can be explained by the cultural dimensions and the sociocultural variable created by our model.

Table 16. Multiple Linear Regression to explain the percentage of single-person households through Hofstede's five cultural dimensions and the sociodemographic variable of Gender Inequality.

Model	R	R^2	R^2 Adjusted	Global Model Test			
				F	gl1	gl2	p
	0.825	0.681	0.675	113.0		3	< .001
	0.861	0.741	0.731	74.5		2	< .001
	0.876	0.767	0.754	56.1		1	< .001
	0.885	0.783	0.765	45.0		0	< .001
	0.901	0.812	0.793	42.4		9	< .001
	0.920	0.847	0.828	44.4		8	< .001

Source: The authors, 2025.

Therefore, we conclude that Hofstede's cultural dimensions, associated with sociodemographic variables, can explain people who live alone in different countries, providing a clue as to how culture affects the search for housing, in this social arrangement, much more than sociodemographic or economic aspects.

Conclusion

According to Therborn (2004), in order to understand the elements that contribute to the explanation of single-person households globally, a broad perspective is required regarding the complex interactions between demographic, cultural, and institutional issues that support the formation of family structures in the world. Contrary to what the literature suggests, that single-person households can primarily be explained as a phenomenon in high-income countries (Mihalopoulos et al., 2021; Ospina, 2020; Vespa, 2017; Ogden & Hall, 2000; OECD,

2019), this study advances the literature by demonstrating that sociodemographic variables and Hofstede's cultural dimensions are better able to explain this phenomenon within the analyzed sample.

In the first model of this study, out of the six sociodemographic variables selected, Per Capita Income and Life Expectancy, variables related to the economy and human development, showed the weakest correlation with the phenomenon of single-person households. On the other hand, the Gender Inequality variable showed a correlation of -0.825, the highest among all variables. Interestingly, a negative correlation was observed for this variable, which means that the greater the gender inequality, the lower the presence of single-person households, and vice versa.

In the model proposed in our study, which took into account three variables: HDI, Education, and Gender Inequality, the multiple linear regression achieved an R2 of 0.72, meaning that 72% of single-person households in the countries comprising our sample were explained by these variables. It is important to highlight that the Gender Inequality variable alone explained 68% of the first model. This finding reinforces that sociodemographic variables, more related to social aspects, are better at explaining the phenomenon of single-person households in our sample than those related to the economy.

The second model proposed by the study was composed solely of variables related to Hofstede's cultural dimensions. The five dimensions studied had an R2 of 0.76, meaning that 76% of all single-person households in the countries of our sample could be explained by our second proposed model. This second finding suggests that cultural dimensions may better explain single-person household arrangements than the sociodemographic variables themselves.

Finally, the third model of the study, which consisted of optimizing the first and second models, was composed of the five cultural dimensions from Hofstede's scale, plus the Gender Inequality variable. This model achieved an R2 of 0.847, meaning that the model created in this study can explain approximately 85% of the single-person households in the sample.

Another finding from the study during the third model was the weight that the Individualism vs. Collectivism dimension had in explaining single-person households. In Cavalcante et al. (2022), the idea of how public policies focusing on either the family or the individual could influence the formation of single-person households was explored. The authors cite examples from Sweden and Brazil, showing that while in Sweden, public policies

encourage individual autonomy or provide individual housing support (Reinikainen, 2024; Berggren & Trägårdh, 2022; Blomqvist & Palme, 2020), in Brazil, social programs are aimed at the family and not the individual (Silva, 2024; Euclydes, 2022; Araújo, 2021; Gomes, 2017; Soares, 2011).

This aspect ties into Hofstede's Individualism vs. Collectivism dimension (Żemojtel-Piotrowska & Piotrowski, 2023; Hofstede et al., 2010; Soares et al., 2007). According to Hofstede, more individualistic countries tend to prioritize individual independence, which is why this was the cultural dimension that best explained single-person households. In contrast, in more collectivist countries, the emphasis is placed on the family unit and community ties (Hofstede et al., 2010), suggesting less prevalence of such household arrangements.

Gender inequality, mentioned in Cavalcante et al. (2022) as a crucial variable in explaining single-person households, is also reflected in Hofstede's cultural dimensions. The Power Distance dimension measures the acceptance of hierarchical inequalities (Hofstede et al., 2010), while the Masculinity vs. Femininity dimension reflects gender role expectations (Żemojtel-Piotrowska & Piotrowski, 2023). For this study, we examined how Power Distance and Masculinity vs. Femininity influence women's empowerment and residential choices.

One of the most important findings of this study and its contribution to the literature is the demonstration that countries with lower Power Distance and more feminine societies tend to provide more support for women's autonomy, allowing greater access to the labor market, the right to education, political representation, and legislation that combats gender inequality. All these factors together provide women with the opportunity to choose how they want to live. On the other hand, cultures with high Power Distance and masculine values reinforce traditional roles, limiting these choices and, consequently, the formation of single-person households.

Although we were able to demonstrate the relationship between Uncertainty Avoidance and Long-Term vs. Short-Term Orientation with variables that explain the phenomenon of single-person households, we were unable to find a conclusive answer to this relationship in the literature. This opens the door for future studies to delve deeper into understanding this relationship.

As a limitation of the study, it is important to highlight that our sample consisted of 55 countries distributed around the world and across five continents. However, it is important to note the low representation of African countries in the sample. It is recommended that future

studies, if possible, collect data from these countries, which may provide more clarity on the findings of this study.

Contribution

This research provides valuable insights into understanding the behavior and organization of individuals living alone, in relation to households, with culture as the premise. The study has important managerial contributions for companies and the formulation of public policies in city planning. Whether for companies or governments, the study provides subsidies in understanding the most suitable type of housing for their country or the target country for construction companies.

For example, in more individualistic cultures, with lower power distance and more feminine, the study suggests that there is a larger market for people living alone, creating a fertile environment for the construction of smaller apartments, studios, or micro-apartments. In contrast, in more collectivist cultures, with higher power distance and more masculine, which tend to have a more traditional view of the family, households should follow more classical housing standards that reflect this traditional family view.

In the context of public policy formulation, this research provides support for governments to identify the most appropriate management approach for the characteristics of each population. In a more individualistic culture, for example, it would be more advantageous to develop public policies tailored to individual needs. In the case of a Master Plan, particularly in its Zoning Law, this could mean prioritizing the construction of smaller apartments instead of houses, considering that this type of culture presents a higher tendency of people living alone rather than in family groups.

References

Venkatesh, A., Peñaloza, L. and Firat, A.F. (2006) 'The Market as a Sign System and the Logic of the Market', in R.F. Lusch and S.L. Vargo (eds) The Service-Dominant Logic of Marketing, pp. 251–65. New York: M.E. Sharpe

Cavalcante, P., Koreeda, G., Camargo, R., Lopes, Evandro. (2022). O Mercado Emergente de Lares de Pessoas que Moram Sozinhas: Estudo Introdutório Acerca das Variáveis que Explicam esse Fenômeno Mundial. Disponível em: https://sistema.emprad.org.br/8/anais/arquivos/44.pdf

CEPAL, (2004). Seminario “La fecundidad en América Latina y el Caribe: ¿Transición o revolución?”, disponível em: https://repositorio.cepal.org/handle/11362/6729

Ariès, P. História social da infância e da família. Tradução: D. Flaksman. Rio de Janeiro: LCT, 1978.

Daun, Âke. (2010). Individualism and collectivity among Swedes. DOI: https://doi.org/10.1080/00141844.1991.9981433

Soares, Suamy R. A feminização da pobreza e as políticas sociais focalizadas nas Mulheres: um debate a ser repensado In: JORNADA INTERNACIONAL DE POLÍTICAS PÚBLICAS, 5., 2011, São Luiz. http://www.joinpp.ufma.br/jornadas/joinpp2011/CdVjornada/JORNADA_EIXO_2011/QUESTOES_DE_GENERO_ETNIA_E_GERACAO/A_FEMINIZACAO_DA_POBREZA_E_AS_POLITICAS_SOCIAIS.pdf.Acesso em: 08 Abril 2022.

Gomes, Fernanda Marcela Torrentes (2017). O DEBATE EM TORNO DAS MULHERES NA POLÍTICA PÚBLICA DE ASSISTÊNCIA SOCIAL. https://repositorio.ufsc.br/xmlui/handle/123456789/180867

Pesquisa nacional por amostra de domicílios : síntese de indicadores 2015 / IBGE, Coordenação de Trabalho e Rendimento. - Rio de Janeiro : IBGE, 2016.

Ministério do Desenvolvimento Social, 2022. DOI: https://www.gov.br/mdr/pt-br/assuntos/habitacao/minha-casa-minha-vida

Nascimento, T. S. D., & Campos, D. C. (2013, April). Programa Bolsa Família como política pública destinada à erradicação da pobreza brasileira. In Anais da Conferência Internacional de Estratégia em Gestão, Educação e Sistemas de Informação (CIEGESI) (Vol. 1, No. 1, pp. 313-328).

Snell, K. D. M. (2017). The rise of living alone and loneliness in history. Social History, 42(1), 2-28., DOI: 10.1080/03071022.2017.1256093

Klinenberg, E. Going Solo: The Extraordinary Rise and Surprising Appeal of Living Alone; Penguin Press: New York, NY, USA, 2012

Ortiz-Ospina, Esteban. 2019. “The Rise of Living Alone: How One-Person Households Are Becoming Increasingly Common around the World.” Our World in Data. DOI:https://ourworldindata.org/living-alone.

Lipovetsky, Gilles. Os tempos hipermodernos. São Paulo: Editora Barcarolla, 2004.

Lesthaeghe, R. (1991). The second demographic transition in Western Countries: an interpretation (pp. 199-2). Interuniversity Programme in Demography.

Lesthaeghe, Ron. 2014. “The Second Demographic Transition: A Concise Overview of Its Development.” Proceedings of the National Academy of Sciences 111(51):18112–15

Alves, José Eustáquio Diniz y CAVENAGHI, Suzana Marta. População e Desenvolvimento: a Terceira Transição Demográfica. DOI: https://www.ufjf.br/ladem/files/2009/05/JEDA-Terceira-TD1.pdf

OECD (2011a), FAMILIES are changing.In:DOING better for families. Paris : Organisation for Economic Cooperation and Development (OECD), 2011.Chap. 1, p. 17-53. DOI:http://dx.doi.org/10.1787/9789264098732-en

OECD (2011b), The Future of Families to 2030, OECD Publishing, Paris, DOI:10.1787/9789264168367-en

Eurostat (2020). European Commission Report on the impact of demographic change. DOI:https://ec.europa.eu/info/files/report-impact-demographic-change-reader-friendly-version-0_en

Uribe Díaz, P. I. (2010). Los hogares unipersonales: nueva tendencia en la estructura familiar. Tendencias y Retos, 1(15), 57-68. DOI:https://ciencia.lasalle.edu.co/te/vol1/iss15/4/

Leone, E. T., Maia, A. G., & Baltar, P. E. (2010). Mudanças na composição das famílias e impactos sobre a redução da pobreza no Brasil. Economia e Sociedade, 19(1), 59-77. DOI:https://periodicos.sbu.unicamp.br/ojs/index.php/ecos/article/view/8642727

Reher, D., & Requena, M. (2018). Living alone in later life: a global perspective. Population and Development Review, 427-454. DOI:10.1111/padr.12149

Gaymu, J., Springer, S. & Stringer, L. (2012). How does Living Alone or with a Partner Influence Life Satisfaction among Older Men and Women in Europe?. Population, 67, 43-69. https://doi.org/10.3917/popu.1201.0045

Kramarow EA. The elderly who live alone in the United States: historical perspectives on household change. Demography. 1995 Aug;32(3):335-52.DOI: https://doi.org/10.2307/2061684

United Nations. Living Arrangements of Older Persons around the World; United Nations: New York, NY, USA, 2005

Lee, S. M., & Edmonston, B. (2019). Living Alone Among Older Adults in Canada and the U.S. Healthcare (Basel, Switzerland), 7(2), 68. https://doi.org/10.3390/healthcare7020068

Vespa, J. (2017). The changing economics and demographics of young adulthood: 1975-2016 (pp. 1-23). Washington, DC: US Department of Commerce, Economics and Statistics Administration, US Census Bureau. DOI: https://www.census.gov/content/dam/Census/library/publications/2017/demo/p20-579.pdf

Burlina, C., & Rodríguez-Pose, A. (2021). Alone and Lonely. The economic cost of solitude for regions in Europe. DOI: https://ideas.repec.org/p/egu/wpaper/2133.html

Shrestha, L. B. (2011). Changing demographic profile of the United States. DIANE Publishing.

Ullmann, H., Maldonado Valera, C., & Rico, M. N. (2014). La evolución de las estructuras familiares en América Latina, 1990-2010: Los retos de la pobreza, la vulnerabilidad y el cuidado. DOI: https://repositorio.cepal.org/handle/11362/36717

Van de Kaa, D. J. Europe's Second Demographic Transition, Population Bulletin 42(1), Washington, PRB, 1987.

Van de Kaa DJ. The idea of a second demographic transition in industrialized countries. Birth. 2002;35:45.DOI:https://www.ipss.go.jp/webjad/Webjournal.files/population/2003_4/kaa.pdf

Van de Kaa DJ. Is the Second Demographic Transition a useful research concept? Questions and answers. Vienna Yearbook of Population Research. 2004:4–10. DOI: https://www.jstor.org/stable/23025432

Alves, José Eustáquio Diniz. A Polêmica Malthus versus Condorcet reavaliada à luz da transição demográfica / José Eustáquio Diniz Alves. - Rio de Janeiro : Escola Nacional de Ciências Estatísticas, 2002.

Coale, A (1979). The demographic transition: a summary, some lessons and some observations. In: CHO, L.; KOBAYASHI, K. (Ed.). Fertility transition of east asian populations. Honolulu : University Press of Hawaaii. cap. 2.

Barrón, S. "Familias monoparentales un ejercicio de clasificación conceptual y sociológica". Revista del Ministerio de Trabajo y Asuntos Sociales. 40 (2002): 13-31. 21 de febrero de 2009.

Coleman, D. (2006). Immigration and ethnic change in low-fertility countries: A third demographic transition. Population and development review, 401-446. DOI: https://www.jstor.org/stable/20058898

Euromonitor (2019a). Future of the Family. Trends in Consumer Spending. DOI: https://www.euromonitor.com/future-of-the-family-trends-in-consumer-spending/report

Euromonitor (2019b). A Look at the Future of the Family. DOI: https://www.euromonitor.com/article/a-look-at-the-future-of-the-family

Euromonitor (2019c). 10 PRINCIPAIS TENDÊNCIAS GLOBAIS DE CONSUMO 2022. DOI: https://go.euromonitor.com/white-paper-EC-2022-Top-10-Global-Consumer-Trends-PG.html

Euromonitor (2020). The Future Consumer: Households in 2030. DOI: https://go.euromonitor.com/strategy-briefing-consumers-2017-households-in-2030.html

Snell, K. D. M. (2017): The rise of living alone and loneliness in history. University of Leicester. Journal contribution. https://hdl.handle.net/2381/39483

Putnam, R. Bowling Alone. The Collapse and Revival of American Community (New York, 2000), 326-32.

Associated Press (2018). UK govt appoints loneliness minister to tackle social isolation. DOI: https://www.youtube.com/watch?v=gHsrZlykhoM

Jones, W.H. Rose, J. and Russell, D. 'Loneliness and social anxiety', in H. Leitenberg (ed.), Handbook of Social and Evaluation Anxiety (New York, 1990), 247-66;

Putnam, R. D. (2000). Bowling alone: The collapse and revival of American community. Simon and schuster.

Mabasso, R. A. (2024). Entre a biparental e homoafetividade: Análise das tensões sociais em torno das novas e modernas configurações familiares. *COR LGBTQIA+*, *1*(6), 66–82. Recuperado de https://revistas.ceeinter.com.br/CORLGBTI/article/view/1073

Vieira, N. de H., & Teixeira, S. M. (2024). Elderly care, family and social policies in the braszilian reality: from na intersectional perspective. *OBSERVATÓRIO DE LA ECONOMÍA LATINOAMERICANA*, *22*(2), e3280. https://doi.org/10.55905/oelv22n2-130

Biroli, Flávia. 2014. Famílias: novos conceitos. São Paulo: Fundação Perseu Abramo.

Campos, Marta Silva e Mioto, Regina Celia Tamaso. 2003. Política de Assistência Social e a posição da família na política social brasileira. Ser Social, 12, 165-190, Brasília, Brasil.

Sorj, Bila. 2004. Reconciling work and family: issues and policies in Brazil. Geneva: International Labour Office. Conditions of work and Employment Series, 8. https://doi.org/10.1590/S0100-15742007000300004

BRASIL. Cartilha Programa Minha Casa Minha - FAR. Brasília: Caixa Econômica Federal, 2023. Disponível em: . Acesso em: 20/12/2023.

EUCLYDES, F. M. et al. "O processo de política pública do "Minha Casa, Minha Vida": criação, desenvolvimento e extinção". Revista de Sociologia e Política, vol. 30, 2022.

ARAÚJO, F. R. DE et al. A implementação do Programa Bolsa Família: revisão de literatura. Emancipação, v. 21, p. 1–20, 29 jun. 2021. DOI: 10.5212/Emancipacao.v.21.2114655.017. Disponível em: https://revistas.uepg.br/index.php/emancipacao/article/view/14655. Acesso em: 02 ago. 2023.

Silva, R. R. d. (2024). *Sistemas de proteção social e políticas de renda mínima na contemporaneidade: Uma análise do programa Bolsa Família no município do Rio de Janeiro*.

Reinikainen, J. (2024). The view of freedom that shaped the Swedish welfare state. *Scandinavian Political Studies*, 1–21. https://doi.org/10.1111/1467-9477.12277

Berggren, H., & Trägårdh, L. (2022). The Swedish theory of love. Individualism and trust in modern Sweden. University of Washington Press.

Blomqvist, P., & Palme, J. (2020). Universalism in welfare policy: The Swedish case beyond 1990. *Social Inclusion*, 8(1), 114–123.

Why do we give human names to pets? A study on the anthropomorphism process of pets

Pedro Paulo Santos Cavalcante

Evandro Luiz Lopes

Eduardo Mesquita

Marcio Belchior

Diogo Cruz

Abstract

This study aims to investigate the dimensions of the human-animal relationship, the connection between human names given to pets, and its reflection on consumer behavior. Although the literature has advanced in understanding the human-animal relationship, little has been analyzed regarding the meanings associated with the anthropomorphism of human names in pets and their implications for consumer behavior. This study conducted a survey of 690 pet owners nationwide to understand these relationships. The results show that giving human names to pets was a characteristic present across all groups and transcends socioeconomic and cultural aspects. The study advances the literature by inferring that the strategy in choosing pet names mimics the dynamics of the human world, suggesting an additional characteristic in the anthropomorphizing process of the human-animal relationship. The study has important managerial contributions, demonstrating that groups who give human names to pets tend to spend more on their animals and suggests that pet expenses are underestimated in family budgets, leading to financial stress for these owners. Recommendations for future studies are provided at the end of the article.

Keywords: Consumer Behavior, Human-Animal Relationship, Anthropomorphism, Pets and Names.

Introduction

In 2018, it was estimated that there were approximately 844 million dogs and cats in the world (Statista, 2024). In the same year, according to UN data (2023), there were 138 million children under the age of one year, resulting in a ratio of more than 8 pets per child under one year old on the planet. By 2022, it was estimated that more than half of the world's population had at least one pet at home (Health for Animals, 2022). In the United States, approximately 70% of households are estimated to have at least one pet (American Pet

Products Association, 2023), while in Brazil, approximately 72% of households have a companion animal (Quaest, 2024).

The 2023 pet census in Brazil, which included more than 2.5 million dogs and cats (PetLove, 2023), found that all the top 10 names cited by respondents were human names or human-like nicknames. Another study conducted with 1,009 Brazilian pet owners, showed that 7 out of the top 10 pet names, were human names (PREPLY, 2023). A study conducted with 690 pet's owners in Brazil revealed that 52% of respondents had given human names to their pets (CAVALCANTE ET AL, 2024).

If names serve the purpose of identifying elements of the world, be they people, places, things, or concepts (RABINOVICH, ET AL, 1993), the notable number of pets with human names stands out. Despite this significant number of pets with human names, there is a scarcity of literature on this aspect of the human-animal relationship. To fill this knowledge gap, this study applied a survey to 690 respondents across Brazil to understand the dimensions of the human-animal relationship, the connections between the names given to pets, and consumer behavior.

The results of this article advance the literature on pets and names, showing that the strategy in choosing pet names mimics the dynamics of the human world, suggesting an additional characteristic in the anthropomorphizing process of the human-animal relationship. Simultaneously, the study has important managerial contributions, demonstrating that people who give human names to their pets tend to spend more than other groups. Additionally, the study indicates that pet expenses seem to be underestimated in family budgets, leading to financial stress for these owners.

This article is organized as follows: the first section presents a literature review on the following topics: Pets, the extended self, and the small other; Names; and the dimensions of the human-animal relationship. Next, we explore the methodology used. The penultimate section discusses the results, followed by the final conclusions of the authors.

Literature review

For the theoretical foundation of this work, no literature was found that combined the topics of Pets, the Extended Self and the Small Other; Names; and the Dimensions of the Human-Animal Relationship in a single study. Therefore, these three themes were addressed separately, and their intersections were explored in the results sections.

Pets, the Self and the Other

According to Thomas (2010), the concept of pets began to develop at the start of the Renaissance, referring to animals that came to be known as pets. The primary requirement for the earliest pet dogs was that they were very small, allowing them to accompany their owners in various social situations (Thomas, 2010). Preferences for pets have varied over time, with demands oscillating based on pedigree, size, fur, exclusivity, and lineage (Ryder, 2019). This evolution reveals how the very concept of pets has been transformed into a component of their owners' lifestyles (Ryder, 2019; Warde, 2005; Bourdieu, 2008).

Warde (2005) posits that the meaning of pets extends beyond their sense as products/objects and their functionality, indicating an intricate system of meanings in the relationship between the individual, social environment, and the pet itself. Expanding on the debate about this new human-animal relationship, Belk (1996) and Hirschman (1994) observed that pets represent an "extended self" of their owners. Belk (1996) notes that pet owners expect their animals to conform to their personality, family, and lifestyle. Consequently, a wide range of products and services has emerged for pets (Harris 1985; Belk 1989; Sussman 1985; Tuan 1984), mimicking human lifestyles and consumption patterns but transposed into the animal world.

Analyzing Lacan literature (2010), it is evident that pets occupy the psychic sphere of the "small other" concept. According to Lacan, the "small other" refers to other individuals similar to the subject, with whom the subject relates and sees themselves reflected (Lacan, 2010). Napoli (2022) suggests that the individual's relationship with the "small other" is marked by narcissism; when the "small other" acts according to the individual's expectations, it brings happiness and harmony, as the individual seeks a semblance. This quest for similarity can also be observed in the human-animal relationship.

The human-pet relationship suggests that pets are undergoing a pronounced process of de-animalization, followed by humanization (Osório, 2019), making them more suited to urban and residential environments. This elevates pets to the category of "small other," an egoic likeness of their owners. Pets are "trained to modulate their animal impulses until they become gentle companions sitting on home sofas in front of the television: not growling, not barking, smelling pleasant and docile" (Segata, 2012, p. 22).

Pets occupy an extremely ambiguous position between the human and animal spheres (Belk, 1988, 1996; Leach, 1983; Osório, 2019; Ingold, 1995). As Belk (1988) notes, they are both at the same time. "They are neither entirely animals nor fully humans; pets live in a separate category, sometimes anthropomorphized, sometimes (re/hyper) animalized (or zoomorphoses)" (Osório, 2019, p. 58). In a more psychoanalytic view, pet owners' perceptions of their pets operate in a three-dimensional emotional sphere where pets are the Extended Self (Belk, 1996; Hirschman, 1994) and the Small Other (Lacan, 2010; Napoli, 2022).

Names

The relationship between names and things has long been a significant philosophical debate (Plato, 2013; Aristotle, 1996; Augustine, 2015). However, there seems to be a consensus that names serve the purpose of identifying elements of the world, whether they are people, places, things, or concepts (Rabinovich et al., 1993). Analyzing the logic of people's names, Heller (2003) asserts that no culture or society exists in which individuals are not distinguished from one another by names. Baggio (2005) and Chevalier & Gheerbrant (1991) suggest that names invoke more than identification; they also reflect a dimension of the individual who names.

Historically, many cultures considered names as an inseparable part of their being, often acquiring a sacred character (Rodrigues, 2024; Sztutman, 2010). Currently, names follow a specific logic system in each place. Studying Western societies, Astoria (2008) found that human names follow three patterns: 1) Tribute to a family member; 2) Tribute to a historical figure or celebrity; and 3) Biblical names. In Brazilian society, Rabinovich et al. (1993) identified seven categories of names: 1) Aesthetic; 2) Fantasy; 3) Tribute; 4) Tradition; 5) Brotherhood; 6) Social; and 7) Chance.

A study conducted with 1,009 Brazilian pet owners (PREPLY, 2023) found that 17% chose their pet's name inspired by a movie character, 16% by cartoon characters, and 10% by soap opera characters or actors. According to the 2023 pet census in Brazil, which included more than 2.5 million dogs and cats (PetLove, 2023), the top 10 pet names were divided into: human names; human-like nicknames; fictional human names; and others.

The first conclusion from these data is the notable number of pets with human names. Another observation is the near absence of pets named after objects; for example, no pets

were named "chair," "cell phone," or "computer." These data suggest that the naming of pets seems to reproduce the logic of the human world.

If literature shows that names serve to classify elements such as people, places, and things (Rabinovich et al., 1993), the predominance of human names for pet's echoes anthropomorphism literature (Hirschman, 1994; Belk, 1988, 1996; Solomon, 2008; Leach, 1983; Osório, 2019; Ingold, 1995). This adds to a series of anthropomorphized behavior characteristics of pet owners towards their pets (Thomas, 2010; Ryder, 2019; Warde, 2005; Bourdieu, 2008), suggesting the human status these animals are being elevated to in contemporary societies.

Dimensions of the Human-Animal Relationship

In a pioneering quantitative study attempting to stipulate the main dimensions of the human-animal relationship, Dotson and Hyatt (2008) proposed seven key dimensions that best explain relationships between humans and animals. These are: (1) Symbiotic Relationship; (2) Dog-Oriented Extended Self; (3) Anthropomorphism; (4) Activity/Youthfulness; (5) Barriers; (6) Specialty Purchases; and (7) Willingness to Adapt. See Figure 1 for further details.

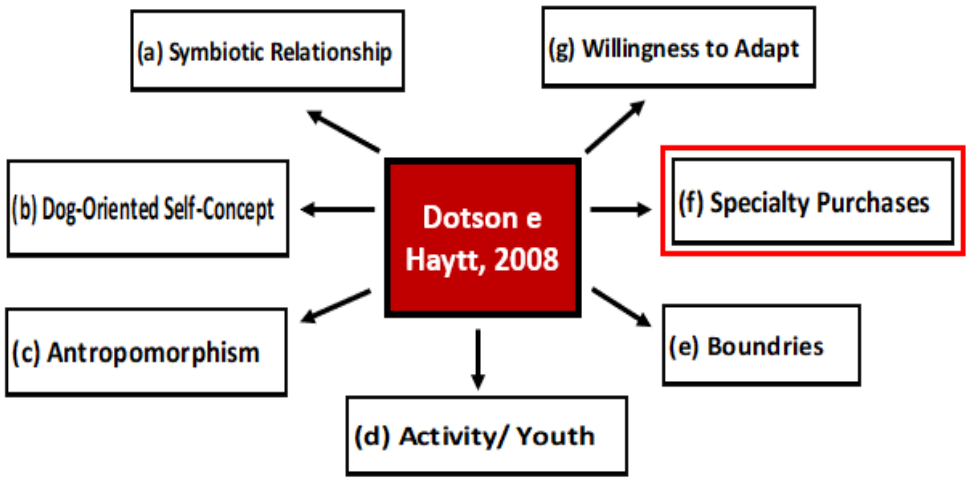


Figure 1 – The Seven Dimensions of the Human-Animal Relationship

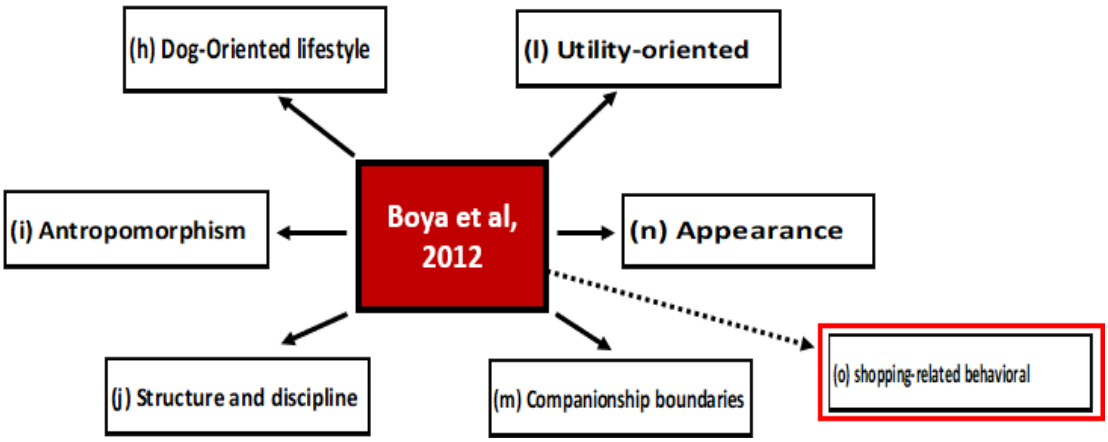
Source: Dotson and Hyatt (2008)

Building on the model designed by Dotson and Hyatt (2008), Boya et al. (2012) proposed that there are six dimensions that best explain the human-animal relationship. These

dimensions are: (1) Dog-Oriented Lifestyle; (2) Anthropomorphism; (3) Structure and Discipline; (4) Utility-Oriented; (5) Companionship Limits and Barriers; and (6) Appearance.

One of the major innovations of the model proposed by Boya et al. (2012) was the theoretical framework for what would become the first variables explaining the consumption behavior of pet owners. In Dotson and Hyatt's (2008) study, Special Purchases (Figure 1) was considered a construct or an additional dimension of the human-animal relationship. In Boya et al. (2012), this was referred to as Consumption Behavior. This variable was used to cluster the dimensions of the human-animal relationship in relation to consumption behavior (see Figure 2). For context, Boya et al.'s (2012) article was written in collaboration with Dotson and Hyatt.

Figure 2 – The Six Dimensions of the Human-Animal Relationship



Source: Boya et al. (2012)

In the model proposed by Chen et al. (2012), there are three types of relationships between humans and pets: Attachment, Interaction, and Human Substitute. These three are closely aligned with what Dotson and Hyatt (2008) and Boya et al. (2012) had proposed. The significant contribution of this new model lies in the consumption behavior of pet owners. The authors segmented pet owners into three clusters: Consumption Value, Information Collection Method, and Retail Choice Criteria. In this sense, Chen et al. (2012) went beyond Dotson, Hyatt, and Boya by clustering pet owners' profiles into specific consumption patterns. See Figure 3 for details.

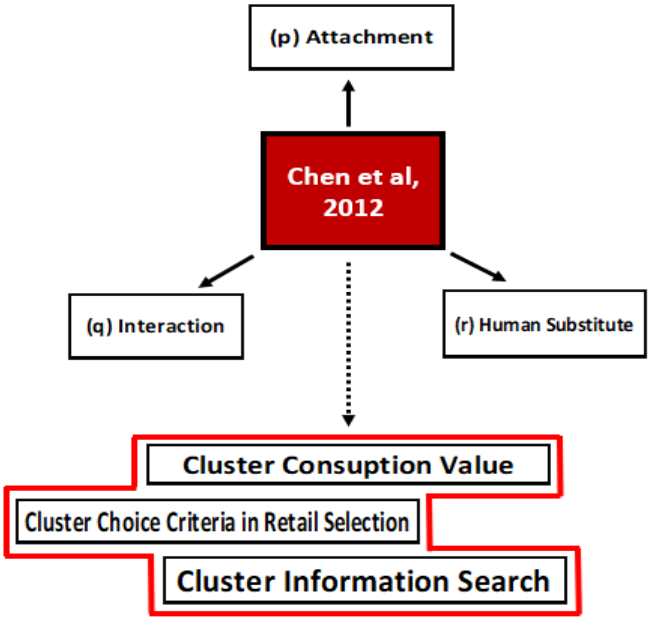


Figure 3 – The Three Dimensions of the Human-Animal Relationship

Source: Chen et al. (2012)

Given the similarity of some constructs, this work adapted the scales proposed by Dotson and Hyatt (2008), Boya et al. (2012), and Chen et al. (2012). In Frame 1, you can see the description of the main dimensions of the human-animal relationship addressed in the literature, which this work used as references, along with the main characteristics and authors that provided the theoretical framework.

Frame 1 - Description of the Main Dimensions of the Human-Animal Relationship

Dimension of the Human-Animal Relationship	Description	Characteristics	Author
Symbiotic Relationship	A mutually beneficial bond between humans and animals	In such a relationship, the human is happier, less stressed, less lonely, more secure, and calmer, while the dog is treated like a child/person	Dotson and Hyatt, 2008; Boya et al., 2012
Pet-Oriented Lifestyle	The pet is an extension of its owner and seen as the human's best friend	Individuals in this dimension tend to spend less time with other people in general due to their relationship with their pet. However, these individuals may have better relationships with other pet owners. The pet occupies a central role in their lives.	Dotson and Hyatt, 2008; Boya et al., 2012
Anthropomorphism	The pet is perceived as a substitute for a child or a family member and has the power to communicate with humans	Owners scoring high in this dimension are likely to talk to their pets	Dotson and Hyatt, 2008; Holbrook et al., 2001; Hirschman, 1994; Belk, 1996
Structure and Discipline - Utility-Oriented	Pets serve as an incentive to make	This dimension corresponds to the "childlike and playful"	Holbrook et al., 2001; Dotson and Hyatt, 2008;

	their owners more physically active	theme of Holbrook et al. (2001). It captures how these owners may feel younger or like children.	Boya et al., 2012; Chen et al., 2012
Companionship - Limits	Reflects the absence of limits imposed on pets by their owners in the home	The pet roams freely around the house, climbs on furniture, and may sleep in bed with its owners. Home configurations may also be adapted for pets.	Dotson and Hyatt, 2008; Boya et al., 2012
Special Purchases	Purchasing behavior	Reveals consumption habits, purchasing behavior, and special efforts to acquire products for pets	Dotson and Hyatt, 2008; Boya et al., 2012
Willingness to Adapt	Analyzes how willing pet owners are to change their lifestyle and consumption patterns to accommodate their pets	These changes can relate to home configuration, vehicle adjustments, and overall consumption changes	Dotson and Hyatt, 2008; Boya et al., 2012
Appearance & Social Value	Analyzes to what extent pet owners choose their pets based on appearance and social acceptance	The pet provides social approval and recognition, and the pet's physical characteristics are predominant	Boya et al., 2012; Chen et al., 2012

Source: The authors (2024)

Method

To address the central question of this article, which was to understand the main dimensions of the human-animal relationship, their association with the human name given to the pet, and consumer behavior, this article followed these steps: 1) Selection of psychographic scales, validation, and adaptation to the Brazilian market; 2) Conducting the survey with 690 pet owners in Brazil; 3) Data interpretation; 4) Literature review; 5) Interpretation of data; and 6) Writing the results and conclusions. Frame 2 outlines the phases, timeline, approach, and key activities of each stage of the study.

Frame 2. Study Phases, Timeline, Approach, and Key Activities

Phase	Timeline	Approach	Key Activities
Phase 1	Sep 2022 - Dec 2022	Selection of Psychographic Scales	▪ Literature Review of Psychographic Scales ▪ Selection of Scales ▪ Validation and Adaptation of Psychographic Scales
Phase 2	Jan 2023 - Apr 2023	Conducting the Survey	▪ Conducting the Survey across Brazil with 690 respondents
Phase 3	May 2023 - Jun 2023	Interpretation of Survey Data (I)	▪ Confirmatory Factor Analysis ▪ Cronbach's Alpha Reliability Statistics ▪ Clustering of Human-Animal Dimensions
Phase 4	Jul 2023 - Oct 2023	Literature Review	▪ Literature Review on Names ▪ Literature Review on Pet Names
Phase 5	Oct 2023 - Dec 2023	Interpretation of Survey Data (II)	▪ Classification and Subdivision of Pet Names into Groups ▪ Relationship between Human-Animal Dimensions, Pet Name Groups, and Average Monthly Expenditure ▪ T-Test for Independent Samples

Phase 6	Jan 2024 - Mar 2024	Results and Conclusions	▪ Writing the Results and Conclusions

Source: The authors (2024).

The survey contained eight constructs, which explained the dimensions of the pet-human relationship, they were: Symbiotic Relationship, Pet-oriented, Anthropomorphism, Structure and Discipline - Utility-oriented, Companionship - Limits, Willingness to adapt and Appearance and Social Value. These eight constructs were measured across 69 statements, measured on a five-point scale (Likert Scale).

The survey also included 23 questions related to the sociodemographic characteristics of the pet owner, the pet, the home and its routine, the pet owner's behavior on social networks and their consumption behavior. There were 22 closed questions and only one open question, which referred to the pet's name. To prepare the layout of the questionnaire for this study, as well as the statements and the choice of scales, three reference studies were taken into consideration (Dotson; Hyatt, 2008; Boya et al., 2012; Chen et al., 2012), that quantitatively explains the dimensions of the animal-human relationship.

Regarding data processing, Jamovi software was used to tabulate and analyze the results. First, we sought to understand the sociodemographic characteristics of pet owners, then an analysis and classification of pet names was carried out. Subsequently, a confirmatory factor analysis and Cronbach's alpha were performed to evaluate the internal consistency of the items and their respective constructs, which measure the dimension of the human-animal relationship. Finally, we performed a T Test for independent samples, to determine the statistical evidence between the dimensions of the human-animal relationship, human names on pets and consumption behavior. The next session presents the results of the analyses.

Results

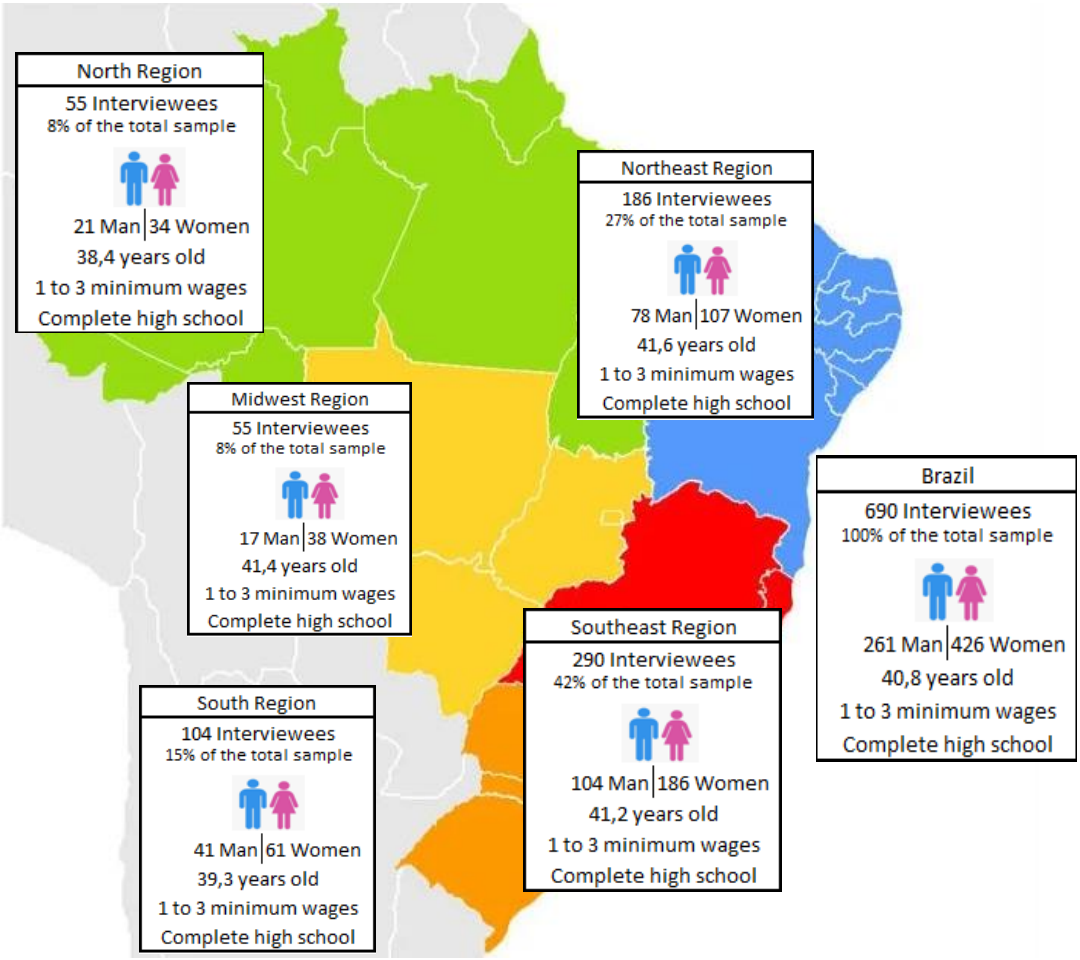
This session will present the results of the survey that was applied. To facilitate data interpretation, this chapter is organized as follows. First, an analysis of the general results of the socio-demographic data of the sample's interviewees was carried out, then the results were analyzed from the perspective of names, then the dimensions of the human-animal relationship were analyzed in a clustered manner and finally the T test crossing the dimensions of the human-animal relationship, names and consumption behavior.

Results by Socio-Demographic

The sample consisted of 690 respondents, of which 261 declared themselves male and 426 declared themselves female, which accounted for 38% and 62% of the sample, respectively. 3

people declared themselves non-binary or preferred not to declare their sexual orientation. The overall average age of the sample was 40.8 years (Minimum= 18 years; Maximum= 76 years; SD= 12.6), with male respondents having an average age of 42.2 years (Minimum = 18 years; Maximum = 76 years; SD = 12.3) and female 40.0 years (Minimum = 18 years; Maximum = 72 years; SD = 12.7). In Figure 4, it is possible to see the geographic distribution of the sample.

Figure 4 – Sample Distribution by Region, Percent Participation, Gender, Age, Education, and Income

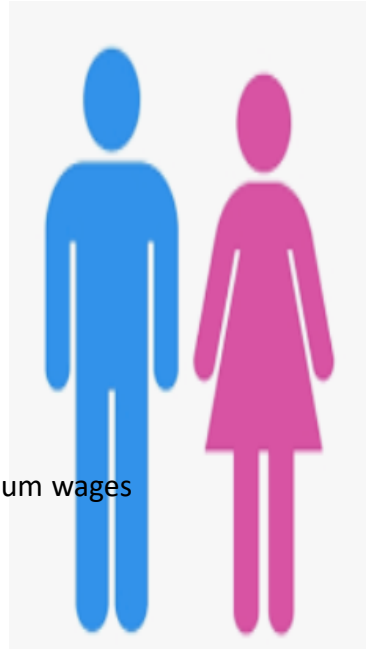


Source: Authors (2024).

The income bracket of 1 to 3 minimum wages had the highest frequency in the sample, accounting for 42% of women and 40% of men interviewed. High school education was the level of schooling observed in 40% of both women and men in the sample. Regarding marital status, 56.2% of respondents declared themselves single, 25.2% married, 12.6% widowed, and 5.9% selected the option "other." Of the 690 respondents, 400 were dog owners, equivalent to 58% of the total sample, 25% were cat owners, and the remaining 18% consisted of respondents who

declared themselves owners of both cats and dogs. In the total sample, 49% of respondents stated that they like to be called pet parents. Of these, 235 were female and 98 male, meaning 55% of those who preferred the term were female and 37% were male. 258 respondents, or 37% of the sample, preferred to be called owners, of which 128 were men and 130 women, representing 49% of male respondents and 30% of female respondents. The options of guardian and other were cited by 10% and 3% of the sample, respectively. Next, in Figure 5, you can see the sample distribution by gender, age, income, and education level.

Figure 5 – Sample Distribution by Gender, Average Age, Income, and Education Level



(Average and Pet style) (Average and Pet style)

Adoption (Acquisition Method) Adoption (Acquisition Method)

Between R$101 and R$300 (Average monthly spending) Between R$101 and R$300 (Average monthly spending)

Source: Survey Data (2024).

Results by Names

Of the 690 names given by respondents to their pets, 52% were human names. These human names were divided into four categories: Human; Human - Fiction; Human - Religious; and Human - Mythological. The other 48% of non-human names were subdivided into ten categories: Nickname; Physical Characteristics; Fruit - Plant; Title; Precious Stones; Pet Product Brand; Soccer Team; Places; and Others. Frame 2 shows the categories of names, definitions, and respective examples. Frame 3 shows the distribution of name classifications, frequency of citation, and percentage.

2. Name Categories, Definitions, and Examples by Category

	Name Category	Definition	Examples
HUMAN	Human	Common human names	Arthur, Frida, Thomas
	Human - Fiction	Names of characters from books, movies, cartoons, games, and comics	Hulk, Thor, Simba
	Human - Religious	Names of biblical or religious figures	Adam, Samson, Noah
	Human - Mythological	Names derived from Greco-Roman mythology	Zeus, Aphrodite, Pandora
NO HUMAN	Nickname	Names derived from human nicknames	Zé, Mel, Lulu
	Comic - Playful	Names of foods, drinks, or everyday items	Jellybean, Popcorn, Star
	Physical Characteristics	Names derived from the animal's physical characteristics	Fluffy, Bushy-tail, Tiny
	Fruit - Plant	Names of fruits or plants	Flower, Blackberry, Blueberry
	Title	Names of titles	Princess, Duke, King
	Precious Stones	Names of precious stones	Sapphire, Ruby, Pearl
	Pet Product Brand	Names of pet product brands	Lupy, Spaix, Rufus
	Soccer Team	Names of soccer teams	Botafogo, Corinthians
	Places	Names of places	Arizona, Kenya, Lion
	Others	Names that did not fit into any classification	Drizzle, Soft, Sky

Source:

Authors, 2024.

Frame 3. Name Classification, Citation Frequency, and Percentage

Frame 3. Name Classification, Citation Frequency, and Percentage

Name Classification	Citation Frequency	% Total
Human	257	37%
Human - Fiction	77	11%
Human - Religious	8	1%
Human - Mythological	16	2%
Nickname	103	15%
Comic - Playful	66	10%
Others	63	9%
Physical Characteristics	51	7%
Fruit - Plant	7	1%
Title	13	2%
Precious Stones	12	2%
Pet Product Brand	12	2%
Soccer Team	2	0%
Places	3	0%
Total	690	100%

Source: Author, 2024.

Both men and women preferred to give human names to their pets. Human names were chosen by 50% of men and 53% of women in the sample. Analyzing the sample by marital status, nearly all groups preferred human names, except for the married group. Widowed, divorced, and single respondents were the groups that most frequently gave human names to pets, accounting for 61%, 55%, and 53% of their respective groups. On the other end, 47% of married respondents gave non-human names. Analyzing the sample by educational level, an interesting phenomenon emerged: respondents with high school and college education gave more human names, 52% and 53% respectively. However, those with elementary education and master's or doctoral degrees preferred non-human names, 52% and 57% respectively.

Analyzing the data by income and monthly expenditures, another interesting phenomenon was observed. Although not entirely linear, it was possible to infer that the lower the income, the higher the proportion of human names given to pets, while higher income correlated with more

non-human names. A similar phenomenon was observed with the variable of monthly expenditures: the lower the monthly expenditure on the pet, the more human names were observed among respondents; conversely, the higher the expenditure, the fewer human names.

In terms of numbers, respondents with an income between 3 to 5 minimum wages chose human names in 55% of cases. When the income ranged between 5 to 7 minimum wages, 53% chose human names, and when the income was above 7 minimum wages, 62% of respondents gave non-human names to their pets. Regarding the variable of expenses, in all groups with monthly expenses up to R$500, more than 51% of respondents gave human names to their pets. However, the group with monthly expenses above R$501 showed an inverse logic, with 55% giving non-human names to pets.

Finally, people who give human names to pets showed a tendency towards more humanized behavior in how they like to be recognized in relation to their pet. 57% of respondents who preferred to be called pet parents gave human names to their pets. Conversely, 54% of respondents who preferred to be called owners gave non-human names to their pets.

Results by Dimension of the Human-Animal Relationship

Table 1 shows that all items presented consistency concerning the constructs they were supposed to estimate (all with p-value < 0.001), as well as reliability measures for the items in the constructs. This corroborates and evidences the robustness of the theoretical model being tested, given the high statistical significance, and demonstrates how well the proposed model fit the observed data.

Table 1 - Confirmatory Factor Analysis of the constructs and their respective items

Factor	Indicator	Estimates	Standard error	Z	p	Standard Estimates
Anthropomorphism	I treat my pet like a person	0.966	0.0439	22.02	< .001	0.728
	Having a pet is like having a	0.892	0.0411	21.73	< .001	0.722

child living at home					
My pet is my best friend	0.853	0.0371	22.98	< .001	0.752
My pet is an extension of myself	1,062	0.0426	24.90	< .001	0.794
My Pet has a lot of my personality	0.966	0.0431	22.43	< .001	0.738
I see pets more as people than wild animals	1,036	0.0454	22.84	< .001	0.748
My pet is like a child to me	1,002	0.0401	24.99	< .001	0.795
I learn a lot from my pets	0.945	0.0378	25.03	< .001	0.796
I have the same responsibilities as a parent when it comes to	0.969	0.0373	25.97	< .001	0.816

	caring for my pet					
	My pet is very similar to me	1,071	0.0439	24.40	< .001	0.783
	I like to spoil my pet	0.918	0.0387	23.75	< .001	0.768
	I like to celebrate my pet's birthday	1,006	0.0523	19.25	< .001	0.658
	When I talk to my pet, I speak with a child's voice	0.957	0.0515	18.60	< .001	0.640
	My Pet understands my main emotions, when I am sad, happy or angry	0.946	0.0412	22.97	< .001	0.750
Pet-Oriented Lifestyle	When I'm stressed, being with my pet calms me down	0.914	0.0337	27.10	< .001	0.839

Pets make the world a better place for me	0.898	0.0333	26.98	< .001	0.837
I'm a happier person because of my pet	0.946	0.0335	28.22	< .001	0.860
I feel emotionally connected to my pet	0.954	0.0345	27.67	< .001	0.850
My pet keeps me from feeling alone	0.853	0.0360	23.65	< .001	0.766
My pet's psychological well-being is an important concern for me	0.847	0.0346	24.49	< .001	0.785
My Pet gives me a feeling of psychological well-being	0.896	0.0340	26.33	< .001	0.824

I would not be willing to establish a relationship with someone who was not willing to accept my pet	0.931	0.0430	21.63	< .001	0.719
I am willing to make sacrifices for my Pet	0.946	0.0411	23.04	< .001	0.753
My pet is part of my family	0.888	0.0338	26.30	< .001	0.823
I can't imagine a home without pets	0.948	0.0428	22.14	< .001	0.731
My pet keeps me young	0.925	0.0455	20.34	< .001	0.687
I often play with my pet	0.826	0.0361	22.87	< .001	0.748
I like going for	0.762	0.0464	16.42	< .001	0.579

	walks with my pet					
	I regularly give my pet treats	0.422	0.0580	7.28	< .001	0.277
Structure and Discipline - Utility Oriented	Having a pet makes me feel safer	0.796	0.0396	20.08	< .001	0.687
	I feel like I can communicate with my pets	0.876	0.0380	23.09	< .001	0.762
	Having a pet force me to exercise more	0.837	0.0493	16.96	< .001	0.600
	I often spend time training my pet	0.741	0.0551	13.46	< .001	0.513
	I have many established rules that my Pets must follow	0.545	0.0537	10.16	< .001	0.388
Companionship – Limits	Spending time	0.709	0.0552	12.84	< .001	0.474

with my pet stops me from spending as much time with other humans					
My pet helps me develop better relationships with other people	0.984	0.0425	23.14	< .001	0.753
I prefer to spend time with my pet than with other humans	0.892	0.0435	20.49	< .001	0.691
My Pet understands my main emotions.	0.910	0.0371	24.49	< .001	0.785
When I am sad, happy or angry I let my pet sit on the	0.843	0.0565	14.94	< .001	0.544

	furniture in the house					
	I like having my pet sleep in bed with me	0.867	0.0595	14.58	< .001	0.534
	My Pet is allowed to roam anywhere in the house/apartment	0.845	0.0456	18.52	< .001	0.641
	I travel with my pets	0.676	0.0610	11.08	< .001	0.413
Special Purchases	I buy items online for my pet	1,122	0.0533	21.05	< .001	0.707
	I am loyal to certain brands of pet food	0.746	0.0468	15.96	< .001	0.569
	I buy luxury items for my pet	1,085	0.0503	21.57	< .001	0.720
	I buy items for my pet on impulse	1,053	0.0534	19.74	< .001	0.674

I'm willing to go out of my way to find special products for my pet	1,073	0.0494	21.72	< .001	0.723
Price is not an issue when it comes to buying something my pet likes.	1,031	0.0495	20.83	< .001	0.701
I always spend more than planned when I go to a store to buy my pet's basic items	1,147	0.0494	23.23	< .001	0.759
I spend a lot of money on my pet	1,047	0.0480	21.81	< .001	0.725
I look for special products for my pet	1,033	0.0451	22.92	< .001	0.752

I like to buy gifts for my pet	1,062	0.0467	22.75	< .001	0.748
I buy the healthiest food for my pet, regardless of the price	0.926	0.0452	20.51	< .001	0.694
I take my pet to the vet regularly	0.856	0.0446	19.20	< .001	0.660
I've already been financially strapped due to some treatment for my pet.	0.902	0.0569	15.85	< .001	0.565
I have my pet's costs well planned	0.723	0.0488	14.80	< .001	0.534
I buy items in physical stores for my pet	0.751	0.0471	15.93	< .001	0.568

I buy items from online stores for my Pet	1,148	0.0537	21.38	< .001	0.716
Having a pet affected the choice of the configuration of the space where I live	0.845	0.0581	14.54	< .001	0.526
Having a pet has changed my grocery shopping habits	1,004	0.0531	18.93	< .001	0.652
I regularly buy medical supplies for my pet	0.981	0.0485	20.24	< .001	0.686
Owning a pet has affected the layout of my home	0.793	0.0590	13.44	< .001	0.491
Owning a pet has affected my	0.779	0.0577	13.50	< .001	0.493

	property's outdoor setup					
Appearance	I chose my Pet because he looks cool	1,057	0.0540	19.59	< .001	0.685
	What I value most about my Pet is because his appearance is beautiful.	1,061	0.0555	19.11	< .001	0.672
	My pet gives me social approval	1,273	0.0492	25.89	< .001	0.831
	My pet gives me a good impression on other people	1,122	0.0498	22.51	< .001	0.756
	My pet improves the way I am perceived	1,243	0.0488	25.47	< .001	0.822
Social media	I think it's	1,084	0.0542	20.01	< .001	0.696

cool that pets have profiles on social media					
I've already posted a photo of my pet on social media	0.876	0.0528	16.61	< .001	0.606
I have more photos with my pet than with my close friends and family	1,207	0.0533	22.66	< .001	0.763
I use social media as a source of inspiration about PET care	1,147	0.0510	22.47	< .001	0.761

Source: the authors (2024).

Following the Confirmatory Factor Analysis, a scale reliability analysis was conducted as a methodological step, measuring Cronbach's α for all constructs. The results indicated that the constructs Anthropomorphism, Pet-Oriented Lifestyle, and Special Purchases had a Cronbach's α greater than 0.9. The constructs Appearance, Social Media, and Companionship - Limits had a Cronbach's α greater than 0.8. Only the construct Structure and Discipline - Utility-Oriented had a Cronbach's α of 0.752, below 0.8. These results reinforce the high consistency among the items comprising the constructs.

Human-Animal Relationship Dimensions, Names, and Consumption Behavior

Following the validation of the dimensions of the human-animal relationship, a Student's T-Test analysis was conducted where the dependent variables were monthly pet expenses and pet names. The independent variables for this study were the dimensions of the human-animal relationship.

The results of the Student's T-Test for independent samples showed that out of the seven human-animal dimensions, five had a p-value less than 10%, indicating statistically significant results with a 90% confidence level. These dimensions were: Anthropomorphism, Pet-Oriented Lifestyle, Companionship - Limits, Special Purchases, and Social Media. See Frame 4 for details.

Frame 4. Student's T-Test for Statistical Significance Between Human-Animal Relationship Dimensions, Pet Names, and Consumption Behavior

Variable	Statistic	df	p
How much do you spend per month on your pet(s)?	t	0.298	688
Mean Score Anthropomorphism	t	1.685	688
Mean Score Pet-Oriented Lifestyle	t	1.743	688
Mean Score Structure and Discipline - Utility-Oriented	t	1.461	688
Mean Score Companionship - Limits	t	2.092	688
Mean Score Special Purchases	t	1.652	688
Mean Score Appearance	t	1.223	688
Mean Score Social Media	t	2.608	688

Source: Authors, 2024.

From the descriptive analysis of the T-Test, shown in Frame 5, where group 0 pertains to pets with human names and group 1 pertains to pets without human names, it was observed that in all dimensions of the human-animal relationship, the average monthly expenditure on pets was higher for pets with human names compared to those without human names.

Frame 5. Descriptive Analysis of the Student's T-Test for Statistical Significance Between Human-Animal Relationship Dimensions, Pet Names, and Consumption Behavior

Variable	Group	N	Mean	Median	Std Dev	Std Error
i - How much do you spend per month on your pet(s)?	0	358	1.96	2.00	0.705	0.0372
	1	332	1.94	2.00	0.661	0.0363
Mean Score Anthropomorphism	0	358	4.06	4.40	0.946	0.0500
	1	332	3.93	4.27	1.029	0.0565
Mean Score Pet-Oriented Lifestyle	0	358	4.21	4.53	0.864	0.0457
	1	332	4.09	4.47	0.912	0.0501
Mean Score Structure and Discipline - Utility-Oriented	0	358	3.72	3.80	0.901	0.0476
	1	332	3.62	3.60	0.967	0.0531
Mean Score Companionship - Limits	0	358	3.70	3.88	0.939	0.0496
	1	332	3.54	3.63	0.997	0.0547
Mean Score Special Purchases	0	358	3.39	3.33	0.978	0.0517
	1	332	3.26	3.24	1.002	0.0550
Mean Score Appearance	0	358	3.18	3.20	1.253	0.0662
	1	332	3.07	3.00	1.228	0.0674
Mean Score Social Media	0	358	3.53	3.50	1.167	0.0617
	1	332	3.29	3.25	1.238	0.0679

Source: Authors, 2024

The confirmatory factor analysis and the scale reliability statistics, which measured Cronbach's α, were essential for validating the scale, the consistency of items, and the construct,

demonstrating that international pet literature is applicable to the Brazilian context. However, the results of the Student's T-Test provide new insights.

The T-Test brought a new perspective on pet anthropomorphism, particularly from the viewpoint of names. Through this statistical analysis, it was possible to confirm that people in the human-animal relationship dimensions of Anthropomorphism, Pet-Oriented Lifestyle, Companionship - Limits, Special Purchases, and social media, who give human names to their pets, spend more than those who do not give human names to their pets.

According to the literature, for people in the Pet-Oriented Lifestyle dimension, the pet is an extension of its owner and is seen as the human's best friend (Dotson & Hyatt, 2008; Boya et al., 2012). In parallel, for people in the Anthropomorphism dimension, the pet is perceived as a substitute for a child or a family member (Dotson & Hyatt, 2008; Holbrook et al., 2001; Hirschman, 1994; Belk, 1996). The characteristics of these dimensions align with the concepts of the Extended Self (Hirschman, 1994; Belk, 1996), where the pet is an additional component of the owner's lifestyle, and the Small Other (Lacan, 2010; Napoli, 2022), referring to other individuals similar to the subject.

Another dimension that emerged in the T-Test analysis is social media, which examines the pet owner's behavior on social media. This dimension operates within a sphere of social acceptance, corroborating the literature by Ryder (2019), Warde (2005), and Bourdieu (2008), which suggests how pets have become an additional component in the construction of their owners' lifestyle, both online and offline.

Finally, the dimensions of Companionship - Limits, reflecting the absence of limits imposed on the pet at home (Dotson & Hyatt, 2008; Boya et al., 2012), and Special Purchases, reflecting purchasing behavior (Dotson & Hyatt, 2008; Boya et al., 2012; Chen et al., 2012), also appeared. While the Social Media dimension shows pets in the construction of the pet owner's lifestyle on social media, these other two dimensions demonstrate how pets are also an essential component in their owners' lifestyle, from their routine, through home organization to purchasing behavior.

The relationship between human-animal relationship dimensions, the human name given to the pet, and higher monthly expenses suggest that pets are an essential component in their owners' lifestyle. Choosing human names for pets may occur precisely because of the ambiguous position pets occupy between human and animal (Belk, 1988, 1996; Leach, 1983; Osório, 2019; Ingold, 1995). However, the finding of this study is to demonstrate the implications this has on the pet owner's consumption behavior.

Conclusions

This study aimed to investigate the dimensions of the human-animal relationship, their connection to human names given to pets, and their impact on consumer behavior. A survey was conducted with 690 respondents across Brazil. The results showed that out of the seven dimensions of the human-animal relationship, five had a direct relationship with human names given to pets and higher monthly expenditures compared to other groups. The study suggests that human names for pets seem to be an additional feature in the anthropomorphism process of pets, with implications for pet owners' consumption behavior.

The study advances and contributes to the literature on pets and names, demonstrating that the strategy and logic behind choosing pet names are, in some way, an extension of the dynamics of the human world. Approximately 52% of respondents in the sample gave their pets human names, a characteristic that transcended regional, economic, and socio-cultural factors such as gender, income, education, and marital status. Choosing human names for pets adds another component to the anthropomorphism process in the human-animal relationship (Dotson & Hyatt, 2008; Boya et al., 2012;

Chen et al., 2012; Holbrook et al., 2001; Hirschman, 1994; Belk, 1996; Leach, 1983; Osório, 2019; Ingold, 1995).

Similar to the logic of human names (Astoria, 2008; Rabinovich et al., 1993; Heller, 2003; Baggio, 2005), the names given to pets followed a similar categorization system to the human world. The human names given to pets varied among common human names (Astoria, 2008; Rabinovich et al., 1993), fictional human names, often from film characters (Astoria, 2008; Rabinovich et al., 1993), religious human names (Astoria, 2008), and mythological human names (Rabinovich et al., 1993).

While the trend of giving human names appears widespread across all sectors of Brazilian society, some sectors stood out. Women showed a higher frequency of giving human names to pets. As income and educational levels increased, the incidence of human names decreased. Lower-income individuals were more likely to give their pets human names and, interestingly, were also the ones who allocated a higher percentage of their income to their pets. Notably, the more human names given, the more humanized the relationship tended to be, evidenced by 57% of respondents who gave human names preferring to be called pet parents.

Another significant finding was the high frequency of statements such as: "I have faced financial difficulties due to my pet's treatment," "I buy items for my pet on impulse," and "I always spend more than planned when shopping for my pet's basic items." These are all items from the Special Purchases construct, one of the five constructs that showed a direct relationship between human names for pets and higher monthly expenditures. This, combined with the fact that 89% of respondents did not have health insurance for their pets, helps explain why respondents reported experiencing financial stress due to their pets.

One of the most important findings of this study is the indication that pet expenses appear to be underestimated in pet owners' budgets, to the extent that it leads to financial stress. This opens up opportunities for the pet industry to develop better value propositions for their products and services, especially pet health insurance plans, loyalty programs that encourage point accumulation for purchases, marketplace apps, or apps for managing pet expenses, among others.

A key theoretical and empirical contribution of this study is demonstrating the relationship between individuals in the human-animal relationship dimensions of Anthropomorphism, Pet-Oriented Lifestyle, Companionship - Limits, Special Purchases, and social media, and higher monthly expenditures on pets with human names compared to other groups. The characteristics of these dimensions reflect the concepts of the Extended Self (Hirschman, 1994; Belk, 1996), where the pet is an additional component of the owner's lifestyle, and the Small Other (Lacan, 2010; Napoli, 2022), referring to other individuals similar to the subject.

Additionally, the ambiguity of pets, which occupy a space between human and animal (Belk, 1988, 1996; Leach, 1983; Osório, 2019; Ingold, 1995), suggests that human names are another feature in the anthropomorphized relationship. However, one of the findings of this study is to demonstrate the implications this has on the pet owner's consumption behavior.

This study also has significant theoretical contributions as it advances the discussion on the human-animal relationship, quantitatively demonstrating which dimensions best explain this relationship. Its most significant contribution is the method employed, which involved validating and adapting three psychographic scales measuring the dimensions of the human-animal relationship (Dotson & Hyatt, 2008; Boya et al., 2012; Chen et al., 2012) for the Brazilian market.

One limitation of this study is that the respondents were dog or cat owners. For future studies, it is recommended to test the behavior of other pet owners, such as bird, fish, or hamster

owners. For future research agendas, it is suggested to include different actors in the pet industry, given that this study focused on the demand perspective.

References

AGOSTINHO (Santo). Opera omnia. Disponível em: www.augustinus.it/latino/index.htm Acesso 01 em Novembro de 2023. AQUINO, Tomás de. Suma Teológica I (questões 1-43). São Paulo: Edições Loyola, 2001.

AMERICAN VETERINARY MEDICAL ASSOCIATION - U.S. Pet Ownership and Demographics Sourcebook. **Schaumburg, IL: American Veterinary Medical Association**; 2002.

ASTORIA, D. **The Name Book: Over 10,000 Names - Their Meanings, Origins, and Spiritual Significance.** 2008

ARISTÓTELES. Organon VI: Elencos Sofísticos. São Paulo: Ed. Nova Cultural/Guimarães Editores (Coleção Os Pensadores), 1996.

BELK, Russell W. Metaphoric relationships with pets. **Society & Animals**, v. 4, n. 2, p. 121-145, 1996.

BOURDIEU, P. Razões práticas: sobre a teoria da ação. Trad. Mariza Corrêa. 6. ed. Campinas, SP: Papirus, 2008.

_____O poder simbólico. Lisboa, Difel, 2009.

BOYA, Unal O.; DOTSON, Michael J.; HYATT, Eva M. Dimensions of the dog–human relationship: A segmentation approach. **Journal of Targeting, Measurement and Analysis for Marketing**, v. 20, p. 133-143, 2012.

CAVALCANTE ET AL. Dissertação: **A relação humano-animal pela ótica dos lares unipessoais.** 2024.

CHEN, Annie; HUNG, Kuang-peng; PENG, Norman. A cluster analysis examination of pet owners' consumption values and behavior–segmenting owners strategically. **Journal of Targeting, Measurement and Analysis for Marketing**, v. 20, p. 117-132, 2012.

CHEVALIER, J.; GHEERBRANT, A. Dicionário de Símbolos. 4ª edição, José Olímpio Editora, Rio de Janeiro, 1991.

DOTSON, Michael J.; HYATT, Eva M. Understanding dog–human companionship. **Journal of Business Research**, v. 61, n. 5, p. 457-466, 2008.

DOTSON, Michael J.; HYATT, Eva M. Does your dog sleep on the bed? An exploratory study of dog-related consumer behavior. In: **Society for Marketing Advances Proceedings**, 2003.

DURKHEIM, Émile. 1996. *As formas elementares da vida religiosa*. (Trad. Paulo Neves) São Paulo: Martins Fontes [1912]

Harris M. **The Sacred Cow and the Abominable Pig : Riddles of Food and Culture.** 1St Touchstone ed. New York: Simon & Schuster; 1985.

HEALTH FOR ANIMALS. Global Pet Health Report 2022. Disponível em: https://www.healthforanimals.org/wp-content/uploads/2022/04/Global-State-of-Pet-Health-Draft.pdf. Acesso dia: 22/11/2023.

Heller, M. (2003) Globalization, the New Economy, and the Commodification of Language and Identity. Journal of Sociolinguistics, 7, 473-492.

HIRSCHMAN, Elizabeth C. Consumers, and their animal companions. **Journal of consumer research**, v. 20, n. 4, p. 616-632, 1994.

HOLBROOK, Morris B. et al. A collective stereographic photo essay on key aspects of animal companionship: the truth about dogs and cats. **Academy of Marketing Science Review**, v. 1, n. 1, p. 1-16, 2001.

IBGE. **Pesquisa nacional por amostra de domicílios** – PNAD, 2021. Disponível em: https://sidra.ibge.gov.br/tabela/9402#resultado. Acesso em: 22 Outubro, 2022.

LEACH, E. Aspectos antropológicos da linguagem: categorias animais e insulto verbal. In: DAMATTA, R. (org.). Edmund Leach. São Paulo: Ática, 1983. (Coleção Grandes Cientistas Sociais). p. 170-198.

ONU - UNICEF. Disponível em: https://data.unicef.org/resources/resource-type/datasets/. Acesso dia: 20/12/2023.

OSÓRIO, A. B. Guloseimas para animais de estimação: comensalidade, afeto e antropomorfismo. **Mediações - Revista de Ciências Sociais**, Londrina, v. 24, n. 3, p. 57–71, 2019. DOI: 10.5433/2176-6665.2019v24n3p57. Disponível em: https://ojs.uel.br/revistas/uel/index.php/mediacoes/article/view/37596. Acesso em: 20 jan. 2024.

PetLove. PetCenso 2023 – PETLOVE, 2023. Disponível em: https://g1.globo.com/df/distrito-federal/noticia/2023/06/21/conheca-os-nomes-mais-populares-para-os-pets-usados-em-2023-no-df.ghtml. Acesso em: 22/12/2023

PLATÃO. Carta VII. Trad. José Trindade Santos e Juvino Maia Jr. Coleção Bibliotheca Antiqua, 3. Rio de Janeiro: Puc Rio/Edições Loyola, 2013.

PREPLY. **Pets no Brasil: saiba quais são os nomes mais populares desses bichinhos no país!** – PREPLY, 2023. Disponível em: https://preply.com/pt/blog/nomes-pets-no-brasil/. Acesso em: 22/12/2023

Rabinovich, E. P., Hulle-Coser, A. C. P., Travaglini, D., & Esteves, E. N. (1993). **Atribuição dos nomes próprios e seu papel no desenvolvimento segundo o relato dos nomeados.** Revista Bras. de Crescimento e Desenvolvimento Humano, 3(2), 119-137.

RYDER, Richard. Animals and Human Rights. Revista Brasileira de Direito Animal, Salvador, v. 3, n. 4, jan./jun. 2008 p. 63. Disponível em: https://portalseer.ufba.br/index.php/RBDA/article/view/11077/8153. Acesso em 15/06/2023.

SOLOMON, M. R. O comportamento do consumidor: comprando, possuindo e sendo. Porto Alegre: Bookman, 2008.

STATISTA - **Number of dogs and cats kept as pets worldwide in 2018. Disponível em:** https://www.statista.com/statistics/1044386/dog-and-cat-pet-population-worldwide/. Acesso dia: 20/10/2023.

SUSSMAN, Marvin B. ***PETS AND THE FAMILY***. Publisher: Haworth Press, New York. Publication Date: *1985*

THOMAS, Keith. **O Homem e o Mundo Natura**l: Mudanças de Atitude em Relação às Plantas e aos Animais (1500-1800). São Paulo: Companhia das Letras, 2010.

TUAN, Yi-Fu. ***Dominance and Affection*: The Making of Pets.** Publisher, Yale University Press, *1984*.

Warde, A. (2005), "Consumption and theories of practice". Journal of Consumer Culture. 5 (2): 131-153. _____ & Martens, L. (2000), Eating out: social differentiation, consumption and pleasure. Nova York, Cambridge University Press.

Rodrigues, R. (2024). Nomes em disputa entre os Tukano do baixo Uaupés. *Boletim do Museu Paraense Emílio Goeldi. Ciências Humanas, 19*(1), e20230030. doi: 10.1590/2178-2547-BGOELDI-2023-0030



Photo by Davi Costa on Unsplash

June 22nd – 25th, 2025

https://iag.puc-rio.br/curso/macromarketing-conference-2025/