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Being Critical in Marketing Studies: The Imperative of Macro Perspectives

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Abstract

In this paper, I argue that an elevated macro level perspective is imperative for conducting critical studies in the fields of marketing and consumer research. There are epistemic barriers to operating in this manner, and I offer several suggestions for overcoming these barriers. Finally, I review the research spaces for critical studies of marketing in various global settings and conclude that UK and Nordic Europe have the best epistemic climate, and this region needs to take leadership in promoting greater range of macro and critical studies of marketing in the rest of the world.

Introduction

In the established earth-related fields of geology and geography, and in the new fields of geo-mapping and earth sciences, prior to the emergence of powerful technologies that could observe our planet from a high-flying airplane or an orbiting satellite, our knowledge of what lay on or under the earth and of what happened on the surface of the planet could only be gleaned by the application of relatively micro-level methods (Laudan 1977). Geologists and geographers of the past diligently set forth with safari gear, hiking boots, sun hats, compasses, and pick axes to create maps and descriptions of the earth and its hidden treasures. With the new apical technologies – operated from the sky with remote sensors, new views of our planet

have opened up (Lane 1996, Blumberg and Jacobson 1997). Such views are panoramic and holistic, and also often penetrating and panoptic (Lane 1996), and of course not free of epistemological and ideological controversies (Raab and Frodeman 2002).

In the fields of marketing and consumer research also, apical and elevated views of the field – the 40,000-foot view, to use an Americanism – are possible and occasionally offered, including from critical perspectives (see Dholakia and Firat 2006, Firat and Dholakia 1982, Firat and Dholakia 2003, Firat and Dholakia 2006, Firat and Venkatesh 1995). The dominant research praxis, however – at least at the center of the academic marketing universe, viz. in North America – shuns or sidesteps or devalues such macro-level and critical views.

Regardless of ideological slant, the macro perspectives in marketing and consumer research are relegated to what can be termed second-class citizenship: such views are tolerated but not celebrated or rewarded.

This paper explores the reasons for the relative lack of macro level approaches in critical studies of marketing, reasserts the importance of macro-level approaches for critical marketing studies, and offers suggestions for overcoming the underlying epistemic barriers and problems.

Epistemic Problems and Barriers

Like geographers and geologists of the past, the self-anointed research elites in marketing and consumer research fields prefer to trek out with safari attire, jungle boots, sun hats, compasses, and pick axes. The epistemic assumption is that knowledge of marketing phenomena can be unearthed only by digging deep at particular spots and observing at close range. Of course, such micro-research adventures are admirable, but the deprecation of macro-research endeavors is not. By not encouraging or sustaining macro-level research perspectives, the marketing and consumer research fields are not only missing out on a more complete view of market and consumption processes, they are ceding ground to researchers from social sciences and humanities, many of whom wield macro-level analytic and interpretive tools quite skillfully to examine the terrains of marketing, brands, advertising, and consumption (see, for example, Arvidsson 2006, Lears 1994, Leiss, Kline and Jhally 1997, Lury 2004). Some of these and similar perspectives are available now in the Zwick and Cayla (2011) collection. The examination of issues of marketing by humanities and social sciences is of course a salutary trend. There is, however, a loss for marketing in the sense that – since marketing scholarship is seen by those outside the field as non-critical, excessively micro, and compromised by corporate ideologies – there is very little referencing of marketing literature, even when the topics of writings in social sciences and humanities are about marketing.

The epistemic barriers to critical studies in marketing, and especially to macro-level work, are internal to the discipline of marketing – it is our colleagues who erect these. Also, as discussed later, the nature and ferocity of these barriers varies across global regions. The means to dismantle these barriers exist; it is the will that is sometimes lacking.

The Macro Imperative

For critical and radical studies in marketing and consumer fields, the macro-level perspectives are absolutely essential. Only from 40,000 feet (or even better, an orbiting satellite telescope) is it possible to observe the ideologies, obfuscations, manipulations and mystifications playing out in markets and consumption contexts, phenomena that critical perspectives strive to discover and bring to light – to promote wider understanding and trigger actions that are resistive, emancipatory, or revolutionary. Indeed, radical approaches are concerned with the roots of the observed phenomena. Of course, micro efforts to dig out and observe *particular* roots are of value, but the rhizomatic thicket of roots of market and consumption phenomena is now spread globally (Appadurai 1996). The macro-level approach – with critical “remote sensing” – is necessary to create at least an approximate map of the intertwined and not-so-visible rhizomes, linkages, influences, and flows. Table 1 summarizes my view of some of the benefits and insights that can be added to critical marketing studies by encouraging macro-level views.

Table 1: Benefits to Critical Marketing Studies from Macro-Level Perspectives

<i>Dimension</i>	<i>Available Critical Marketing Perspectives and Insights</i>	
	<i>From Micro and Meso-Level Studies</i>	<i>From Macro-Level Studies</i>
Context and Perspective	Local contexts assume primacy	Global views are possible
Units of Analysis, Interpretation	Individuals, Small Groups, Tribes	Individuals, Groups, Tribes, Institutions, Nexuses of Institutions, Regions, Nations, Societies, Classes, Planet Earth
Relationships	Immediate, evident, first-level	Widespread, rhizomatic, intertwined, multi-level, often invisible (subterranean)
Ideologies	Treated as irrelevant or of minor significance	Of major, often central significance
Source for Theorizing	Psychology, Economics, Psychoanalytic, Cultural Studies	Sociological, Politico-Economic, Anthropological, Geographic, Psychoanalytic, Cultural Studies

Macro perspectives indeed can offer most of the insights that micro and macro perspectives can offer, albeit at a zoom-out analytic/interpretive level. More importantly, however, it is only from the zoom-out level that processes occurring in and amongst institutions, nexuses of institutions (i.e., inter-institutional settings), regions (subnational and supranational), nations, societies, and classes can be observed and studied. Moreover, the observing and critiquing of ideological stances is much easier at the macro level than at other levels – because elevation affords a measure of dispassion in observing the “goings on” at the surface way down below. This is why the macro levels are so important for critical marketing studies.

Like social scientists and humanities scholars who adopt macro and critical perspectives (e.g., Hardt and Negri 2000), the minority of researchers in marketing and consumer research who adopt macro and critical approaches understands that the maps produced by such approaches are approximate – and subject to updating and refinement. This, however, should not make such critical maps of market and consumption phenomena objects of derision or neglect. Indeed, if such maps are shunned, then marketing and consumer research would face the same epistemic stonewalls that geologists and geographers sometimes face – instrumental-technical, and perhaps historical-hermeneutic-interpretive, approaches are permissible but critical and emancipatory ones are not (Perkins 2009). The result is that the field remains somewhat lopsided, incomplete, and epistemologically immature – and suspect in the gaze of other knowledge fields that do not have such blinders.

Macro-Critical Perspectives

Critical marketing studies represent an evolving field that redefines itself continuously – as new scholarship and innovative perspectives come into play, from both within marketing academia and from outside the marketing discipline (Tadajewski and Brownlie 2008b). Rather than embarking on (the impossibility of) defining critical marketing, I would like to offer guideposts for those wishing to engage in macro-level and critical scholarship in marketing.

The research spaces – we can call these researchscapes – in marketing and consumer research can roughly be divided into three categories: a very large mainstream of positivist research from non-critical perspectives, a minor but growing substream of research – mostly non-critical – that uses interpretivist approaches, and a yet smaller space of critical studies. The latter usually lies outside the mainstream (though it need not, as Tadajewski (2010b) has argued) and therefore could be characterized as “off-stream” or “counter-stream” research. Such divisions exist in many other research fields (see, for example, Perkins 2009). Table 2 outlines the chief characteristics of these researchscapes.

Table 2: Philosophical Distinctions across Researchscapes in Marketing

<i>Researchscape</i>	<i>Stream characterization</i>	<i>Domains (types) of Knowledge</i>	<i>Philosophical Orientation</i>	<i>Wider Aims</i>
Instrumental-Technical	Very Large Mainstream	Reason, rationality, science	Positivist	Explanation, Control, Prediction
Historical-Interpretive	Smaller Substream	Understanding, feelings, emotions	Hermeneutic	Interpretation
Critical-Radical	Still Smaller Off-stream or Counter-stream	Unmasking false beliefs (critique), Creating alternatives (humanistic)	Open and Eclectic	Emancipation, Resistance, Transformation

Source: Author’s summarization based on Dholakia (1982), Perkins (2009), Tadajewski and Brownlie (2010b).

I argue in the concluding section that in academic marketing studies, there is some permeability between the instrumental-technical and the historical-interpretive researchscapes but – at least in North America – there is a nearly impermeable barrier between these two and the critical-radical researchscape.

This barrier is created by the research elite of the discipline. It has, fortunately, been breached – and widely so – in the marketing researchscapes of Great Britain. There is thus no inherent knowledge-systemic reason why greater research attention should not be focused on the critical-radical researchscape. The most productive way to boost such attention, I argue here, is to bring macro-level perspectives to critical marketing studies. Firat and I attempted this in the book *Consuming People* (Firat and Dholakia 2003), but a critical mass of such works needs to build up so that literature of this type – produced from within the marketing discipline (see Zwick and Cayla 2011 for another example) – achieves some visibility outside the discipline. Once there is dialogic traffic between critical (and I would argue macro-level) literature in marketing and other disciplines, then – through greater cross-referencing – there would emerge a rising spiral of such work in all disciplines.

What then can be done to encourage macro-level work in critical marketing studies? I do not want to delve here into issues of intellectual gatekeeping (in terms of review processes, doctoral topic selection, hiring and promotion practices), but rather to suggest general intellectual directions for advancing macro, critical research in marketing and cognate disciplines.

Interdisciplinarity

If the same phenomenon is analyzed or interpreted from (say) a political and a psychoanalytic perspective, it could generate critical insights not just from each of these perspectives but also from the interaction of the perspectives. This is not always easy, but it is done fairly commonly in social sciences and humanities.

There is a real concern as to how far critical analysis, especially if done in post-Marxist frames, can go in business school research settings (Harney 2009). With the 2007-2009 Great Recession, there are some calls from b-school linked researchers for reforming capitalist markets to make them “inclusive” or “conscious” (Barton 2011, Sisodia 2011), but no real proposed alternatives for markets that are freed from the iron-cage of Finanzkapital. My view is that limits can only be found by testing them, and if the limits are impossible to surmount, then interested b-school researchers should seek collaborations outside their disciplines.

Crossing Levels

If the same phenomenon is studied at multiple levels – say micro, meso, and macro – then the “zooming in-out” process could reveal aspects of the phenomenon that are likely to remain obscure when observation is from only one level. This of course is exactly what critical studies want to achieve – unmasking of otherwise hidden links and processes. Again, crossing levels increases time and effort of a research endeavor, but there is payout in terms of greater critical understanding.

Historical Depth

While the contemporary world characterized by hyper-speed techno-cultural changes seems to be escaping the gravitational pull of history, in reality the tether to history is intellectually very important for critical studies (Dholakia 2012). Seeking historical depth does not mean a rearguard view – far from it, critical and radical studies are typically committed to vanguard views. Looking ahead without a careful mapping of where we have come from, however, is often a recipe for intellectual disaster. Critical research work needs to refer to historical maps even as it charts pathways to new emancipatory and transformational futures.

Praxis

Mutuality of theory and action is very important in critical and radical work (Dholakia 1982). To the extent possible, in research and in teaching (where it is often easier to do), academics should strive for praxis; wherein theory informs (inspires, guides) action and action informs (enriches, develops) theory. When it clicks, this is another virtuous, upward bending spiral.

Systemic and Dialectic

Systemic models that allow for contradictions should be tolerated, even encouraged. Contradictions do not vitiate a theoretical structure – in critical studies, they are a part of the theoretical structure.

Dynamic Theoretical Openness

While there is recognition that long-enduring paradigms are not key substrates in many social science endeavors, there is nonetheless resistance to theoretical renewal and change – for reasons often of intellectual conceit rather than anything else. Radical theories are dynamic. As the usual quip goes, Marx – if he were to reappear in contemporary times – would refuse to be a Marxist. Critical and radical theories are about change, its possibilities, and the obstructions to it. These are also theories *for* change, in the sense of guiding the actions that change social and intellectual structures. Critical marketing studies require a much greater degree of theoretical openness than prevails in the field at this juncture.

The conditions outlined above appear daunting but are not impossible. As I survey the global state of the field in the next section, there are indications that such conditions are being met in the leading edge work in critical marketing studies in some parts of the world, and the situations are ripe for propagating such work styles in other parts of the world.

Surveying the Global Field

In the 21st century, there is somewhat greater attention to the critical and macro-level approaches to the study of marketing and consumption phenomena (Tadajewski and Brownlie 2008a). Such attention is emanating from Europe, particularly the United Kingdom and Ireland (see, for example, Bradshaw, McDonagh and Marshall 2006, Hackley 2002 and 2009, McDonagh 1995, Tadajewski and Maclaran 2009), and to a lesser extent from the Scandinavian countries (see, for example, Moisander, Markkula and Eräranta 2010). From the United Kingdom, for example, Mark Tadajewski (2010a) has written a synoptic history of critical marketing studies, covering the stunted American base of such work as well as the burgeoning European base. From 2011, he and Pauline Maclaran are establishing a new book series on critical marketing studies, under the Routledge publishing label. The English language scholarship in Oceania occasionally reflects the British trend – there is a small but significant measure of critical scholarship, at least in management (Clegg and Palmer 1996).

The largest academic bloc in continental Europe, Germany, remains mostly uncritical in its studies of marketing. This is because in Germany, the separation between business schools and other disciplines is very sharp, and critical work is left to “proper” disciplines such as

cultural studies, sociology, and political science. Ironically, France – the home and source of much of the critical theory that is shaking up the humanities, social sciences, and the applied fields of management and marketing the world over – itself does not show much evidence of critical approaches to marketing, with a few notable exceptions (e.g., Cova and Dallı 2009).

In the United States, attempts to create radical and critical discourses in marketing (e.g., Firat, Dholakia and Bagozzi 1987) have been sidestepped and stonewalled. American marketing and business scholars who dare to broach critical topics are often forced to seek publishing outlets located in or managed from Europe (e.g., Dholakia 2009 and 2011, Firat 2009, Zwick, Bonsu and Darmody 2008).

The largest demographic mass, and therefore the largest future base of intellectual activity in all fields, is in Asia. This should be the future site of major critical marketing studies, too, with Asia increasing its presence and weight in such studies. In this respect, however, the past and the present of Asia are hardly encouraging. Critical marketing scholarship in Asia is either nearly absent, or confined to linguistic corrals. Japan, for example, has a long history of critical scholarship in marketing but the work is in Japanese language, and thus inaccessible to the larger world – except in the form of occasional glimpses provided to the English-reading world (Usui 2011). China, the nominally communist nation, shuns critical studies – the only occasional exceptions occur in the freewheeling intellectual entrepot of Hong Kong. India, while home to some strong critical social science and critical humanities traditions (e.g., Nandy 2009), also mostly shuns critical approaches in fields like marketing and management. Indian marketing scholars attempt to ape the tried-and-true mainstream research patterns of the West, pursuing what Varman and Saha (2009) have characterized as “mimesis of the West and silencing of local subaltern stakeholders” (p. 811).

Even as Asia – along with Latin America and Africa – expand the intellectual presence of their scholars in various fields, including hopefully critical marketing and consumer studies, for the foreseeable future the circuits for legitimation and propagation of knowledge would continue to pass through the gateways of the West. This is the stark *realpolitik* of research in almost all fields of intellectual endeavor. In marketing, therefore, for those wishing to see wider and more varied critical studies – the onus of promoting such works falls on the leading critical marketing scholars of the West. In light of the hobbling financial crisis of 2008, there could be some openness to critical perspectives in the United States, though the possibility is really small. Most of the critique-oriented post-Great-Recession work in the b-school settings of the U.S. has a moralist tone: stronger leaders and better CEOs will bring us all back to a more wholesome path (Barton 2011, Sisodia 2011). In the United States, even the slightest ray of economic optimism tends to re-channel the academic work in business related fields into

celebratory rather than critical avenues. This is the nature of scholarship in a nation built on manifest destiny and future orientation – historical reflection and critical perspectives gain some footing in tough economic times but are cast aside when optimism returns, especially in applied fields like business disciplines.

This means the onus of promoting greater, varied, and globally more balanced types of critical marketing scholarship falls on Northern Europe, especially the United Kingdom. It is hoped that France and Germany would eventually join the trendsetting endeavors from the UK and Scandinavia. Eventually – as has happened in the humanities and many social sciences – the North American and Asian academia also would have to acknowledge and join in such critical studies endeavors, and establish dialogues with the critical marketing studies happening in Europe.

Concluding Observations

Let me offer again a geographic analogy to visualize the intellectual landscape of marketing. Imagine a vast and rolling meadow where most of the researchers in marketing studies prefer to locate and work. This is the instrumental-technical-positivist space, or what can also be called mainstream research. This space is safe, non-threatening, and well stocked with rewards for high performers.

At one edge of this vast space there is a deep and foreboding chasm. On the other side of this chasm lies the historical-hermeneutic-interpretive space, characterized by some wild brush but otherwise a generally pleasant landscape. A few, somewhat precarious footbridges however are available to cross the chasm, to move from the vast mainstream rolling meadow and into the smaller – though often very exciting and interesting – research space on the other side of the chasm. In the historical-hermeneutic-interpretive space, the rewards are fewer – and cornered by some intellectual giants. Still, there is room for newer and younger scholars, and some are opting to move to this space.

Now imagine the *other* edge of the historical-hermeneutic-interpretive space. There is a double barbed wire fence, interspersed with guard towers equipped with trained machine gunners looking for trespassers who want to cross into the next space – the critical-radical space. The landscape on the other side is stark, but stoically primitive and beautiful – much like the compelling stark beauty of the desert southwest of the United States. There are no rewards on the other side. If one finds a way through the barbed wire and evades the fusillade of machine gun fire by mainstream and even interpretive guards, it is possible to enter the critical-radical space. Of course, one has to carry one's own water and provisions to sustain in this

space. There await in this space, however, the intellectual possibilities of discovering fundamental patterns and truths.

What I have described is of course the research landscape for academic marketing studies in North America. The situation is different in various parts of the world. In the United Kingdom, especially, the chasm is being quickly reduced to a mere ditch – and the barbed wire rolls and machine gun guard towers are few, and easy to evade. It is possible therefore for researchers to move easily into different types of researchscapes, and the rewards – which are fewer than available in North America – are not necessarily reserved for the denizens of any one type of research space. The boundaries between the spaces are mere dotted lines – to be crossed easily and without fear of losing rewards or even one’s job. This is already the case in Critical Management Studies in the United Kingdom, and Critical Marketing Studies are moving in this direction, though with a footing that is not as sure as in Management Studies.

In many social science and humanities disciplines – sociology, anthropology and cultural studies for example – the soft-boundary intellectual landscape described in the previous paragraph exists on a global scale. Researchers can be located in any part of the world and work with any style of intellectual exploration. This is what needs to happen in the field of marketing. As I have said – and I say this aware of the unfortunate postcolonial irony entailed in this – there is need for active leadership to invite and promote critical-radical scholarship in marketing, globally, and such leadership has to come from Northern Europe at this historical juncture. A landscape of marketing scholarship with soft and easily permeable boundaries across disparate intellectual styles – including of course critical marketing studies – would be diverse, productive, interesting, and might just help transform our world into a better place.

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