



EXPLORATIONS IN TAOIST PHILOSOPHY AND
MARKETING THOUGHT

A thesis submitted in partial fulfilment of the requirements for the
Degree of Master of Commerce in Marketing
in the University of Canterbury

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2022

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Abstract

Faced with the urgent need to expand marketing thought beyond Western-centrism, this thesis explores marketing theory in relation to a *Taoist* philosophical approach. The aims of this research are to open marketing thought to incorporate a deeper understanding of philosophical perspectives, provide a novel approach to examining the interaction between marketing and the contexts in which it takes place, and to support inter-cultural dialogue from a New Zealand-based research perspective. The work begins with a brief overview of the contemporary marketing studies environment before introducing *Taoist* philosophy. The research approach and methodology are then provided including scope, limitations, and potential contributions. The methods employed for this research are comparative-historical analysis and dialectical reasoning. A literature review on existing business research that features *Taoist* concepts is included to explore the extant literature on the topic. A review of the underlying philosophy of Western marketing thought is then provided to outline paradigmatic themes while addressing some of the key philosophical underpinnings adopted throughout the history of marketing thought. Finally, a dialectic between the two perspectives is put forward along with implications for practice and further research. Key topics addressed include self-concept, the role of marketing in broader systems (both natural and social), the aims and intentions of marketing as relating to the concept of the 'good life', and epistemology, with particular focus on methods of reasoning.

Acknowledgements

To Jak, I am grateful each day for your love, care, support, patience, generosity, cooking, meme-curation, honesty, integrity, and encouragement.

Michael, thank you so much for asking me what interests me and giving me the necessary push to write about it. For someone who loves to read, think, and write as much as I do, your genuine mentorship, writing advice, and general supervisory mastery is far beyond marketable value.

Thank you for reminding me to consider the important questions, like - so what? And for never failing to remind me of the value in structuring one's argument, or that one of the key reasons we write is to be read.

Ekant, thank you for your support. Your personable approach to undergraduate lecturing played a big part in bringing me back to The Academy. I will always appreciate your willingness to discuss how matters of life and death are relevant to marketing researchers like us.

Ann-Marie, thank you for introducing me to the historical method and for your generous support in coordinating the MCom program, along with Sanna. Your passion and dedication are inspiring.

To my friends, family, colleagues, without your support I would not have completed this work. I thought my thesis would be on marketing in an emergency, but it turned out to be about something closer to emergence. Inspired by Capra, I asked myself – can marketing be a path with heart? At the end of this journey and the start of another, I have reached some conclusions, but also generated many more questions. With this said, I'm grateful to every person who has shown the generosity of spirit, time, and insight that has brought this document into being. If we are to really live the 'good life', we will have to remain relentlessly open minded, open hearted, curious, and present to all that life has to offer and all that it might take.

Chapter 1: Introduction

1.1 Research Context

This thesis presents a dialogue between two worldviews — *Taoist* philosophy and marketing thought. Across three explorations, the relevance of *Taoist* ideals to contemporary marketing thought is engaged with on a chiefly philosophical basis. As such, this thesis considers the implications of the existing underlying assumptions on which marketing thought has been built while directly engaging with an alternate philosophical approach.

Through value creation, delivery, and exchange, marketers act to bring about desired business outcomes while also inciting and fulfilling customer wants, needs and aspirations. This process may occur through the purchase of a particular product, the adoption of a belief, or through a shift in existing behaviour patterns (Achrol & Kotler, 2012). As well as in the commercial marketing of goods and services, this can be seen through the focus on personal growth in certain markets (Toledano, 2019) and the social marketing movement which employs marketing theory and tactics towards a common good (Bandyopadhyay & Ray, 2019; Glenane-Antoniadis et al., 2003; Gordon et al., 2011; Gordon et al., 2016; Kotler & Zaltman, 1971; Pittz et al., 2020). In this way, marketing has become inextricably embroiled with values, ideals, and ways of living both in New Zealand (where this research is conducted) and around the world (Ger, 1999).

What's more, ongoing developments in digital technology such as e-commerce, peer-to-peer platforms, open-source information, decentralized currency, and virtual-commerce are further contributing to accelerated connectedness and complexity for marketers and consumers alike. In a contemporary business and research environment where change is the only constant, where wicked problems abound (Brown et al., 2010), and where information is abundant and emotive, if not necessarily accurate (Gudonis et al., 2021), there is a well of potential insight available in imaginative, open, and transdisciplinary enquiries (Brown et al., 2010), such as this one, to provide new modes of understanding of marketing practice and thought.

From a semiotic perspective, meaning making in marketing represents the attachment of existing cultural symbols and ideas onto products and services which are then assimilated and integrated into consumer identities (McCracken, 1986; Mick et al., 2004). Throughout the history of marketing thought, papers concerned with consumer identities, or self-concepts commonly adopt concepts developed for a psychotherapeutic setting, such as self-congruence or self-actualisation

(Hamm & Cundiff, 1969; Saenger et al., 2020). Considering this, while it has traditionally favoured a scientific model based on empirical evidence and logical-rationalism (Arndt, 1985; Golder, 2000; Lemel, 1993; Saad, 2021; Sánchez-Núñez et al., 2021; Shaw, 2020; Svensson et al., 2008; Tadjewski & Jones, 2012), marketing thought can also be framed and explored as a cultural instrument in both personal and collective meaning-making. In this sense, marketing shapes how people derive meaning in life while also presenting solutions (products and services) as a mechanism for the realization of various iterations of a ‘good life’ or the embodiment of personal, social, and cultural ideals (Belk, 1988; Horvat et al., 2009; Mick, 2007, 2017). This drive towards the fulfillment of human goals is consistent across different schools of marketing thought, however the reported parties of intended benefit vary greatly, whether it be companies and corporations (Day & Wensley, 1983), consumers (Mick, 2012), or more sweeping ambitions for society, humanity, and the environment (Pittz et al., 2020).

1.2 Explorations, Dialectics and Positionality

1.2.1 Explorations

Considering marketing as a psycho-physical topic, this thesis employs a method of journeying, or exploration to read further into received knowledge and consider some of the contextual influences in the field of marketing thought. It is an endeavor to look at the sub-structure of a marketing as a value(s) system. It is also an exercise in contrast. By viewing marketing discourse in conversation with a differing value structure, it may illuminate what has previously been hidden or difficult to see. This journeying approach to enquiry has a long history in philosophical traditions (Capaldi, 1998; Clark, 2016; Frazier, 2020; Lin, 2016) and harks back to Plato in *Phaidros* with the question of ‘where are you going and whence?’ (Darbellay et al., 2008).

As influenced by Cheng (1994), this thesis adopts a processual narrative, in that understanding is evolving through the processes of both writing and reading. Cheng (1994) presents a non-linear narrative, in that knowledge, or knowing, can be approached in terms of small cycles nested within larger cycles. In this sense, the path to knowledge may be viewed as a spiral of understanding which is in part influenced by the cultures and sub-cultures we are born into or choose to enter as adults. For example, Cheng (1994) references his being Chinese and his individuality as not totally separate, but also implies that he is not entirely defined by the culture he was born into and is also influenced by his academic training. As such, this thesis considers

the influences of nature, nurture, and what Dabrowski (1964) termed the third factor - the role of conscious choice in personal development, which may also be applicable on a collective basis to re-evaluate and reshape the systems of marketing, production, and consumption that are so influential in present ways of life.

1.2.2 Dialectics

To support the evolution of the ideas in question, dialectic reasoning is used to enable two contrasting positions on a topic to be addressed in tandem while retaining aspects of both arguments that may contradict each other (Maybee, 2020). Dialectics seek to ‘divide the one’ as a means to penetrate the object of enquiry – systematically searching for the truth beneath appearances (Kosik, 2012). Bhaskar (2008) present dialectics as a loosener of established binaries. In this sense, dialectics provide a method by which to parse out the “the relation between the concept of a relation and the relation itself – between signifier and signified” (Moore, 2017a, p.309). Dialectic reasoning has also been put forward as being more appropriate (than Aristotelian logic) for engaging with Chinese philosophical traditions, because it supports a form of synthesis that allows for paradox (Lee, 2000; Maybee, 2020; Peng & Nisbett, 1999).

By virtue of the comparative approach, arguably inherent in the history of philosophy (Frazier, 2020), this thesis is predominantly concerned with the underlying structures of ideas in the chosen topics. As such, the thesis is itself modelled on the interplay between rational knowledge and intuitive wisdom, mirroring the contrast between *Taoist* philosophy and marketing thought. It is an approach toward the creation of novel insight through open-minded exploration, trust, and play alongside the respectful evaluation of extant knowledge as close-ended, rational, and discrete (Li, 2012).

It is written with an appreciation of the value of relational thinking and learning through contrast (Alexander, 2016). As insight and understanding are both moveable and multifaceted, the discovery process inherently produces multiple metaphors, analogies, and images of what is being described (Schooler et al., 1995). Chief among those analogies adopted here is that of a journey or, rather, an intellectual exploration. As such, this thesis engages metaphilosophically. Through the process of exploration, it ‘maps’ the underlying relationships between different ways of thinking or approaching life (Frazier, 2020) within the field of marketing.

This thesis also includes a discussion on *Taoist* philosophy which is founded in experiential knowing, not conceptual description (Cheng, 1994; English & Feng, 1972; Kirkland, 2004; Li, 2016; Sui Pheng, 2003; Watson, 1968; Zhuangzi et al., 1974). There is some loss of fidelity through the translation to English which is then further filtered through the author's perspective. Therefore, the reader is encouraged to remain present to both intellectual and embodied responses to the work.

The *Taoist* ideas discussed are deeply rooted in Eastern indigenous cultural traditions which nevertheless carry global implications (Li, 2016). Therefore, this research is conducted with a foundation of scholarly respect and critical rigor in the convention of the history of ideas (Clarke, 2000). As such, this work does not present a *Taoist* perspective but rather engages with two contrasting cultural institutions (mainstream marketing thought and *Taoism*) from a particular New Zealand-based perspective. It is not so much a *Tao* of marketing or even a primer on marketing philosophy, but rather a careful and deep engagement with three literature streams – marketing thought, *Taoist* philosophy, and the places in which these two socio-cultural institutions have and could intersect.

1.2.3 Personal Commentary

About five years into my marketing career, I became aware of how much received knowledge I carried regarding what marketing is, how it is done, and why. During that time, much as any curious twenty-something-year-old may be prone to do, I (against my better judgment) began to wonder why things are the way they are. And why am I the way I am? And why do many business owners feel the need to outsource at least a portion of their decision-making to marketers, agencies, or consultants? Questions, questions, questions! Having grown up during the proliferation of the handheld Internet, I have essentially unlimited access to conceptual descriptions of cultural, spiritual, and scientific insight, granted it is of varying degrees of quality, but the information is all there. What I want is an ability to make sense of it, to discern what is nonsense and what is true, but also what is useful and what constitutes 'the good life', a full life, and a life well lived.

I understood the methods in marketing practice, the 'how', but I had difficulty understanding the 'why' or the justification moving behind a *modus operandi* which includes rushing to meet tight deadlines, knocking down the competition, or speaking predominantly in acronyms and jargon.

Many qualities that in an individual may be seen as maladaptive (paranoia, manipulation, fear, freneticism) seemed almost encouraged in a modern business environment. For a field of work that is so often critiqued for perpetuating the ‘hedonic treadmill’, it didn’t actually feel that good. What’s more, the front-facing marketing side seemed very isolated from other aspects of business, and the principles seemed to me as somewhat removed from the reality of a human life and all the growing pains that go along with it. With a personal history punctuated by not-insignificant crises in my direct environment, processing and responding to these events has frequently felt directly at odds with maintaining a ‘normal’ job in marketing. This tension led me to a personal interest in crisis management, psychosomatics, nervous system regulation, meaning making, and several Eastern originating traditions including Buddhism, Hinduism, and Taoism.

Several small-talk conversations in which “I work/study marketing” have been met with canned replies of “I hate marketing” or “Why would *you* do that”, got me wondering what the big talk of marketing might be. So, this is my (initial) attempt at exploring the Big Talk of marketing. I could have just as easily chosen many other lenses for contrasting the historical marketing ideals. However, the translations of *Taoist* texts seem to me as an urge towards acceptance and presence coupled with self-mastery and an alignment with, often unseen, natural rhythms in the process of life.

1.3 Thesis Structure and Outline

Chapter 1 sets the context and boundaries for enquiry before Chapter 2 provides the research approach, methods, and positionality with a summary of reviewed materials following in Chapter 3. Then, in Chapter 4, *Taoist* philosophy is introduced and business research which draws on *Taoism* is reviewed. In Chapter 5, an historical approach is employed to review some key assertions of marketing thought. This method brings to light some of the often-implicit assumptions marketing research makes about living, working, consuming, and, ultimately, relating in a world where marketing and markets are in constant interaction with individual and collective perceptions, beliefs, and assumptions about both human nature and reality (Ardley, 2008; Palmer & Ponsonby, 2002). From the changing definitions of marketing to the dominant research paradigms, ideas in marketing thought, and their origins, all these are explored to investigate and synthesise both the incumbent and emerging grounds of marketing discourse.

While *Taoist* philosophy and marketing thought stem from different cultural contexts, they are both chiefly concerned with the effective action of an individual (the buyer, seller, or firm in marketing or the individual in *Taoism*) within a large and dynamic system (markets in marketing or nature in *Taoism*). As such, the research takes a dual-track approach to consider both unit and system-level analysis, decision-making, and action. In this thesis, considerable attention is directed towards the influence of dualistic thinking in capitalism as related to both current and historical social climates (Moore, 2017b). By considering marketing thought within the broader social context, this allows for a greater understanding of how assumptions regarding separation-based dichotomies (such as self/other, marketer/consumer, nature/society) may have shaped the aims and contributions of marketing thought. As Moore (2017b) presents

The social sciences emerged not only on the premise of fragmentation and the autonomy of spheres (culture, politics, economy, etc.) but also on the ground of human exceptionalism. Seeing human relations as not only distinct from nature, but as effectively independent of the web of life, has shaped social thought for two centuries. (Moore, 2017b p.596)

Considering this, the assumptions behind marketing thought regarding the interaction between individuals, society, and nature is explored through alternative philosophical framings and may therefore hopefully provide insight and direction for both the conceptual and practical progression of the marketing domain.

Chapter 2: Research Approach

2.1 Research Aims

The primary aim of this research is to investigate the prospects of opening marketing thought to incorporate a deeper understanding of an alternative worldview in *Taoist philosophy*. The second order aims are to provide a novel perspective on the relationship of marketing thought with broader human pursuits for knowledge in relation to the larger web of life, and to support inter-cultural dialogue from a New Zealand-based research perspective. A further contribution of this thesis is to provide greater conceptual clarity on the existing body of business research incorporating *Taoist* ideas. To support conceptual synthesis, an exploratory approach is used (Llewelyn, 2003). As such, the notion of ‘exploration’ serves as a vehicle to engage in discussion at the meeting point of Western marketing thought and *Taoist* philosophy. The intent is to illuminate received knowledge in marketing thought and consider other ways of being in the world. This includes a discussion of where these two viewpoints may be at odds or where concepts may have been superficially interpreted in existing research which adopts *Taoist* ideas in a marketing context. As such, this work also serves to gain an initial understanding of the potential contribution, if any, of *Taoist* principles to contemporary marketing theory and measurements of success. An evaluation of the potential of these ideas to contribute to marketing theory also requires investigation into the history of mainstream theory building in marketing research. Therefore, to provide depth of enquiry as well as context for synthesis, the research takes a longitudinal and historical approach (Golder, 2000; McMullan & Dann, 2020) to review marketing thought and its underlying philosophies and aims over time. Both these aims and the adopted approach carry an intention to improve the contextualization of marketing research within both the wider research community and broader socio-cultural discourse.

2.2 Comparative Historical Analysis

Consistent with the aim for conceptual comparison and synthesis, historical analysis has been used throughout this thesis (Golder, 2000; McMullan & Dann, 2020; Savitt, 1980). As such, the approach is concerned with the utility of ideas rather than only questions of truth (Llewelyn, 2003). To successfully conduct research in this manner, an analytical approach is required that comes from a place of unknowing and being willing to be surprised by the outcomes of the

inquiry (McMullan & Dann, 2020). Furthermore, this culturally and historically informed approach has been selected to allow for a discussion on broader social themes and patterns of human activity in which marketing plays an increasingly influential role (Domegan, 2010; Fullerton, 2011; Golder, 2000; McMullan & Dann, 2020; Tadajewski, 2004).

The historical method of analysis has influenced the development of marketing theory since its infancy (Jones & Shaw, 2018). This method is most appropriate for investigating literature to contextualise theory, synthesise findings, and ultimately uncover new insights (Golder, 2000; McMullan & Dann, 2020; Thompson, 2010). Furthermore, a longitudinal, discussion-based approach allows for triangulation across time periods, cultural settings, and methodologies (Saad, 2021). Therefore, this study employs a five-stage historical method as per Golder's (2000) seminal paper on historical method in marketing research:

- (1) Select a topic and collect evidence
- (2) Critically evaluate the sources of the evidence
- (3) Critically evaluate the evidence
- (4) Analyze and interpret the evidence, and
- (5) Present the evidence and conclusions (Golder, 2000, p.158).

More specifically, to support the analysis of these two major social institutions, a comparative approach is adopted. As such, the research includes discussion of how particular personal or cultural influences may have shaped interpretations (Lavin & Archdeacon, 1989). To support a comparative approach, dialectic reasoning is employed for the final chapter.

As marketing develops over time, there are increasing numbers of 'borrowed' concepts and methods from other fields. Therefore, face validity (measures should be understandable at face value), semantic validity (terms are consistently used and interpreted by different researchers), and content validity (concepts match what is being described) are increasingly important to consider (Brennan et al., 2011; Jones & Shaw, 2018). These measures have been guiding factors in research method selection and execution. For more inclusive analysis, this approach also allows for evidence to be drawn from outside academia. In contrast to a purely narrative or interpretive approach, historical method enables an arguably more thorough method for synthesis

by incorporating multiple forms of evidence including “descriptive statistics, model parameters, and narrative discussion” (Golder, 2000, p.159). Additionally, elements of systematic review are employed and adapted from the Cochrane Handbook for systematic reviews (Henderson et al., 2010; Higgins & Cochrane, 2019). Specifically, searches were conducted in a systematic manner and search queries are recorded and included in the final work. To set the foundation for discussion and provide conceptual clarity, some key terms are outlined and introduced prior to analysis.

2.3 Limitations

Language represents one of the key limitations of this research. One limitation for this study is that the researcher is not trained in Sinology. The research is conducted in English by a New Zealand-based researcher, so the discussion of *Taoist* concepts heavily relies on numerous English translations, analyses, and interpretations of *Taoist* ideas. As such, the reviewed literature includes papers by China-based researchers, Chinese diaspora, and researchers without a Chinese background. Another limitation is access to the existing body of work on the subjects being investigated as some material has not been digitised or made available in English. Accessing material has been reliant on inter-library loan availability and translations, or in some cases secondary sources.

2.4 Scope of Research

The proposed structure is not exhaustive. Some concepts are excluded from the study and flagged for future research (see chapter six). Through the historical method, the management of personal bias is integrated into the work and the researcher must remain open to what the conclusions may be (Golder, 2000; McMullan & Dann, 2020). To ensure relevance to the questions and remain consistent with historical methods for analysis, there have been interesting, yet irrelevant, materials excluded from the study (Golder, 2000). The research primarily addresses the topic at a philosophical and conceptual level. Therefore, practical implications are included but do not represent the core contribution of the work.

2.5 Alternative Methods Considered

A systematic literature review was considered. However, this approach would be more suited to examining an area with a larger existing body of empirical studies (Henderson et al., 2010).

Given the limited number of empirical studies on *Taoist* marketing, qualitative interviews, case studies, and experimental designs were also considered (Fischer et al., 2014; Shapiro, 2008). However, given the broad scope of interest, adopting these methods risked expanding the practical scale of the research to the detriment of conceptual depth and clarity. Furthermore, the thesis aims are directed toward philosophical discovery, so an in-depth literature-based approach was deemed more appropriate.

2.6 Contribution to Knowledge

There are multiple calls in the marketing literature to expand theory beyond the dominant Western-centric approach through engagement with diverse scientific (Gummesson, 1998; Saad, 2021), commercial (Moorman et al., 2019), cultural (Du, 2011; Li, 2016; Love & Hall, 2021; Mick, 2017; Sutton-Brady et al., 2010), and historical perspectives (Jones & Shaw, 2018). Therefore, the primary contribution of this work is to open marketing thought to incorporate a deeper understanding of differing philosophical perspectives. Consistent with the need to expand marketing thought beyond Western-centric viewpoints (Sutton-Brady et al., 2010), this thesis specifically engages in dialectical reasoning to explore marketing thought in parallel with a *Taoist* philosophical approach.

While there has been some research which applies *Taoist* concepts to business, it is predominantly in management fields, such as organisational behaviour and transformational leadership, and focuses on selected concepts such as *yin* and *yang* (Durlabhji, 2004) or *wu-wei* (Xing & Sims, 2012). Such literature has largely argued in favour of adopting *Taoist* ideas and often concludes that more research should be done on the application of these principles to business theory and practice (Baskin, 2011; Dimovski, et al. 2013; Durlabhji, 2004; Liangrong, 2019). More broadly, concerns have been raised over studies incorporating *Taoism* in that they should not disregard elements which are considered distasteful or incongruent with Western researchers' current paradigms (Kirkland, 2004). However, the overt application of *Taoist* ideas in marketing studies initially appears limited.

Given the value of historical research for theoretical development (Hunt, 2018; Jones & Shaw, 2018; McMullan & Dann, 2020), one intended contribution of this thesis is conceptual clarity between previously isolated findings in the existing body of marketing research. This process will allow synthesis of the existing research into *Taoism* as applied to marketing and

management to uncover potential implications for both marketing thought and practice. This approach also provides context for a deeper discussion on the relationships between marketing, humanity, nature, and spirituality. Therefore, the contribution includes analysis on some of the underlying assumptions and philosophical approaches employed through the history of marketing thought. While this research explores just one alternative to a dominant Western worldview, it also sets a foundation for this approach to be applied to other philosophical systems. Finally, this work will explore one, seemingly divergent, approach to marketing thought based on *Taoist* philosophy which, as a relatively uncharted perspective, allows for an original contribution to the field.

2.7 Method

To provide an overview of the application of *Taoist* philosophical concepts in management and marketing research, a scoping review was carried out following Mays et al. (2001) guidelines. Following preliminary searches on Scopus and Google Scholar, searches were conducted on the following databases: Emerald Insight, Science Direct, Business Source Complete, and CABI. Publications were only included where the full text was retrievable in English.

Due to *Taoist* concepts largely being translated in *Pinyin* (Romanised phonetic Chinese characters), and the prevalence of Chinese homonyms, multiple search terms were required. To account for semantic inconsistencies, alternative spellings of *Taoist* concepts were searched for; *Tao* and *Dao*, *yin-yang*, *yin/yang*, *ying and yang*, *Tao Te Ching*, *Dao De Ching*, *I Ching* and *Yi Jing* and *Dao De Ling*, *Chuang Tsu*, *Laotzu*, *Laozi*, *wu-wei* and *wei wu wei*. Searches were also conducted with exclusions as follows: author name *Dao*, *Tao*, or *Yin*, and *Taobao* (an e-commerce site). As further English translations of *Taoist* concepts were revealed within the literature, follow-up searches were conducted using the alternative terms and concepts presented as core to *Taoist* philosophy. Reference lists were also reviewed, and relevant papers included as deemed appropriate (Mays et al., 2001).

Because of the prevalence of *Taoist* concepts in broader Chinese culture and widespread adoption of the philosophy, a large portion of the initially returned results included general studies concerned with culture, religious studies, or Chinese business practice. In accordance with Mays et al. (2001) criteria for inclusion of papers within a scoping review, studies were included based on quality of evidence, relevance to the review, and theoretical orientation.

Reputability was assessed as being either peer-reviewed or part of the grey-literature that was deemed within Adams et al.'s (2017) 1st Tier category for grey literature. As such, books and book chapters were included while book reviews were excluded. Furthermore, broader studies concerned with culture or religion as an operant in marketing and management fields were not included. Research was also excluded where *Taoist* philosophy received passing mention and was not the core focus of the study. From an initial return of 1271 articles, 231 abstracts were read, and 43 articles were included in the review (Table 2.1).

To inform an overview of the changing philosophical foundations of marketing research, and a basis for the following dialectic, a review was carried out following Mays et al. (2001) guidelines. After preliminary searches on Scopus and Google Scholar, searches were conducted on Science Direct and Business Source Complete. Papers were only included where the full text was retrievable in English. The search terms included marketing philosophy, marketing worldview, marketing axioms, marketing paradigm, marketing myths, and foundations of marketing. In line with the instruction presented by Witkowski and Jones (2007) for historical qualitative research, both primary and secondary sources were consulted. Alongside peer-reviewed journal articles, books, book chapters, and research method handbooks have also been included. From an initial return of 4,745 articles, 500 abstracts were read, and 116 articles were included in the review (Table 2.2). Reference lists in reviewed articles were also scanned and additional articles added where a reference was signaled as instrumental in formation of the authors' article. A summary of the reviewed research alongside a brief technical analysis is included in Chapters 2 and 3 before the underlying philosophical implications are of each review are discussed in depth through Chapters 4 and 5.

Table 2.1*Literature Review Search Terms – Taoism and Business Research*

Search Terms (Title, Abstract, Author Specified Keywords)	Database	Number of Results
Marketing AND tao te ching NOT taobao NOT name	Business Source Complete	36
Marketing AND i ching NOT taobao NOT ching name	Business Source Complete	72
Marketing AND taoism NOT taobao NOT name NOT Buddhism NOT Confucianism	Business Source Complete	41
Marketing AND Daoism NOT Taobao, Buddhism, Confucianism	Business Source Complete	4
Marketing AND Chinese philosophy	Business Source Complete	2
Marketing AND ying yang	Business Source Complete	6
The Tao of marketing	Business Source Complete	0
The Tao of management	Business Source Complete	13
Management AND tao* or dao*	Business Source Complete	92
Management AND laozi	Business Source Complete	6
Marketing AND laozi OR lao tzu	Business Source Complete	1
Marketing AND taoist OR daoist	Business Source Complete	7
Marketing AND i ching, tao te ching, taoism	CABI	6
Management AND i ching, tao te ching, taoism	CABI	6
Marketing AND taoism	Emerald Insight	384
Marketing AND daoism	Emerald Insight	75
Marketing AND dao	Emerald Insight	411
Marketing AND dao	Science Direct	29
Marketing AND taoism	Science Direct	40
Marketing AND yin-yang	Science Direct	40
Total returned		1271
Abstracts read		231
Items included		43

Table 2.2*Literature Review Search Terms – Marketing Philosophy*

Search terms (title, abstract, author specified keywords)	Database	Number of results
marketing AND philosophy	Scopus	1800
marketing AND worldview	Scopus	73
marketing AND axioms	Scopus	99
marketing AND paradigms	Scopus	3348
marketing AND myths	Scopus	602
marketing AND philosophy	Science Direct	15
marketing AND worldview	Science Direct	12
marketing AND axioms	Science Direct	10
marketing AND paradigms	Science Direct	368
marketing AND myths	Science Direct	54
marketing AND philosophy	Wiley	79
marketing AND worldview	Wiley	5
marketing AND axiom	Wiley	7
marketing AND paradigms	Wiley	69
marketing myths	Wiley	77
Total returned		4745
Abstracts read		500
Items included		111

Chapter 3: Reviewed Materials

Alongside an outline of the reviewed research (Table 3.1, Table 3.2), descriptive statistics of the searched and reviewed materials for both literature reviews are provided here. A brief technical summary is also provided in this chapter with deeper analysis and discussion presented in subsequent chapters. In line with the methods outlined above, the reviewed research is presented chronologically, and the chapter includes a brief commentary on the location of institutional affiliation.

3.1 Reviewed Materials: Taoism in Business Research

The application of *Taoist* ideas to business research as been adopted in both comparatively and directly. In one approach, parallels are drawn between *Taoist* concepts and existing theoretical frameworks of organisational behaviour (Durlabhji, 2004; Mattsson & Tidström, 2015). The contrasting method develops new frameworks from a foundation of *Taoist* ideas (Baskin, 2011; Cheng, 1994; Du et al., 2011; Hsiang-Ju et al., 2010; Li et al., 2012; Li, 2016; Luo & Zheng, 2016; Ming-Jer, 2002; Yadong & Qinqin, 2016). The majority of the reviewed research takes a narrative approach, with limited employment of empirical studies. In the reviewed literature on *Taoism* in business research, 30% (13) are conducted cross-culturally. Overall, 39% (16) hold at least partial institutional affiliation in China and 30% (13) have institutional affiliation in the United States. Of the four reviewed studies with institutional affiliation in Taiwan, three incorporated primary data.

The principle *Taoist* concepts addressed in this review include *yin-yang* (complimentary opposing forces) (Li, 2016; Luo & Zheng, 2016), *guanxi* (inter-relation) (Du et al., 2011), *feng shui* (wind-water method for balancing energy) (Chang, 2009; Peng et al., 2012; Wu et al., 2012), *wu-wei* (non-action) (Lai, 2008; Subramanian et al., 2019), *nei yeh* (inward training) (LaFargue, 1992; Pedler & Hsu, 2019), and *ziran* (primordial nature) (Liu, 2016). These concepts have been selected with consideration of the context of marketing research, concepts used in the reviewed literature, translations of *Taoist* texts (English & Feng, 1972; Watson, 1968; Wilhelm & Baynes, 1968; Zhuangzi et al., 1974), and the scope of this project as a Master's thesis.

Table 3.1*Summary of Reviewed Research: Taoism in Business Research*

Title	Author/s (Year)	Journal	Country of institutional affiliation	Research focus and/or theoretical frameworks
Diversity as community and communions: A Taoist alternative to modernity	Cheng (1994)	<i>Journal of Organizational Change Management</i>	China	Diversity in organisational change management
East meets West: Weaving the threads of Deming, Da Vinci and the Tao te Ching	Hensler, Edgeman, & Guerrero-Cusumano (2000)	<i>Total Quality Management</i>	USA	Total quality management
The Tao of forecasting	Riehm (2000)	<i>Journal of Business Forecasting Methods & Systems</i>	USA	Forecasting
Diversity, productivity, profitability, sustainability, and the Tao of underutilized species	Youngs & Hammett (2001)	<i>Forest Products Journal</i>	USA	Sustainable forestry Sustainability

Transcending paradox: The Chinese 'middle way' perspective	Ming-Jer (2002)	<i>Asia Pacific Journal of Management</i>	USA	Paradox management Hofstede's cultural index
Impersonal vs. personal exchanges in marketing relationships	Jancic & Zabkar (2002)	<i>Journal of Marketing Management</i>	Slovenia	Marketing relationships Schizo-marketing disorientation
Lessons from Lao Tzu's Tao te Ching for the facilities manager	Sui Pheng (2003)	Facilities	Singapore	Facilities management Leadership
The Tao of organization behavior	Durlabhji (2004)	Journal of Business Ethics	USA	Organisational behaviour based on Robbins (2003) <i>Managing Today!</i> Adapted to incorporate a <i>Taoist</i> perspective
Science versus humankind: The yin and yang of motivation theory	Rhee & Sigler (2005)	<i>International Journal of Organization Theory & Behavior</i>	USA	Motivation theory Organisation behaviour
Luck of the draw: Creating Chinese brand names	Chang & Lii (2008)	<i>Journal of Advertising Research</i>	Taiwan	Branding Psychology of superstition

Benefits of Hong Kong Chinese CEO's Confucian and Daoist leadership styles	Cheung & Chi-fai Chan (2008)	<i>Leadership & Organization Development Journal</i>	Hong Kong	Leadership
Bridging the systematic thinking gap between East and West: An insight into the yin-yang-based system theory	Hsiang-Ju et al. (2010)	<i>Systemic Practice & Action Research</i>	Taiwan	Critique of yin-yang theory
Taoism and its model of traits of successful leaders	Bai & Roberts (2011)	<i>Journal of Management Development</i>	China & Canada	<i>Taoist</i> leadership framework
Integrating Taoist yin-yang thinking with western nomology: A moderating model of trust in conflict management	Du, Ai, & Brugha (2011)	<i>Chinese Management Studies</i>	China & Ireland	Moderating model of trust in conflict management
The effect of traditional Chinese fuzzy thinking on human resource practices in mainland China	Yuan, & Chia (2011)	<i>Chinese Management Studies</i>	China & UK	Fuzzy thinking Human Resourcing (HR)
The I Ching: An ancient Chinese handbook suitable for achieving corporate responsibility	Young (2011)	<i>Journal of International Business Ethics</i>	USA	Corporate Social Responsibility (CSR)

Yin yang and company growth: A case study of a coal company of Shanxi in China	Li, Wang, & Fan (2011)	<i>Chinese Management Studies</i>	China	Company growth Yin-yang theory
How Chinese thought can lead the transformation in management practice	Baskin (2011)	<i>Chinese Management Studies</i>	USA	Emerging organisational model of unmanaging
The key components of feng shui and their implications for marketing	Yau (2012)	<i>Psychology & Marketing</i>	Singapore	Feng shui Marketing psychology
Leadership, Daoist wu wei and reflexivity: Flow, self-protection and excuse in Chinese bank managers' leadership practice	Xing & Sims (2012)	<i>Management Learning</i>	China & UK	Wu wei Self-reflexivity Leadership
A yin/yang perspective on the 2008 global financial crisis	Leung et al. (2012)	<i>British Journal of Management</i>	UK	Crisis management
Consumers' views of feng shui: Antecedents and behavioral consequences	Luk et al. (2012)	<i>Psychology & Marketing</i>	Australia, China, & New Zealand	Consumer behaviour

Confucian and Taoist work values: An exploratory study of the Chinese transformational leadership behavior	Lin, Ho, & Lin (2013).	<i>Journal of Business Ethics</i>	Taiwan	Transformational leadership
Applying the principles of yin–yang to market dynamics: On the duality of cooperation and competition	Mattsson & Tidström (2015)	<i>Marketing Theory</i>	Sweden & Finland	Cooperation and competition Market dynamics Business network perspective
Traditional Chinese philosophies and contemporary leadership	Ma & Tsui (2015)	<i>Leadership Quarterly</i>	China & USA	Leadership
Knowing guanxi from the perspective of Tao: A mixed methodological approach	Tian, Ma, Hu, & Li (2015)	<i>Chinese Management Studies</i>	China	Management
Competing in complex cross-cultural world: Philosophical insights from yin-yang	Luo & Zheng (2016)	<i>Cross Cultural & Strategic Management</i>	USA & China	Strategic management
Global implications of the indigenous epistemological system from the east: How to apply yin-yang	Li (2016)	<i>Cross Cultural & Strategic Management</i>	China & Denmark	Yin-yang balancing Paradox management

balancing to paradox
management

A Daoist reflection on sea-like leadership and enlightened thinking	Xing (2016)	Management & Organization Review	China	Leadership
Taoist and Confucian values evident in the travel motivations of contemporary Chinese tourists: The importance of self-cultivation	Shao & Perkins (2017)	<i>Journal of China Tourism Research</i>	Australia	Tourism
Searching for the Tao? Reexamining modern changes in Asian management: Characteristics and significance	Jones & Liu (2017)	<i>International Journal of Business & General Management</i>	Poland	Leadership Management
Taoist leadership and employee green behaviour: A cultural and philosophical micro-foundation of sustainability	Xing & Starik (2017)	<i>Journal of Organizational Behavior</i>	China	Leadership Aldo Leopold's land ethic
The traditional Chinese philosophies in inter-cultural leadership: The case of Chinese	Lin, Li, & Roelfsema (2018)	<i>Cross Cultural & Strategic Management</i>	Holland	Inter-cultural leadership

expatriate managers in
the Dutch context

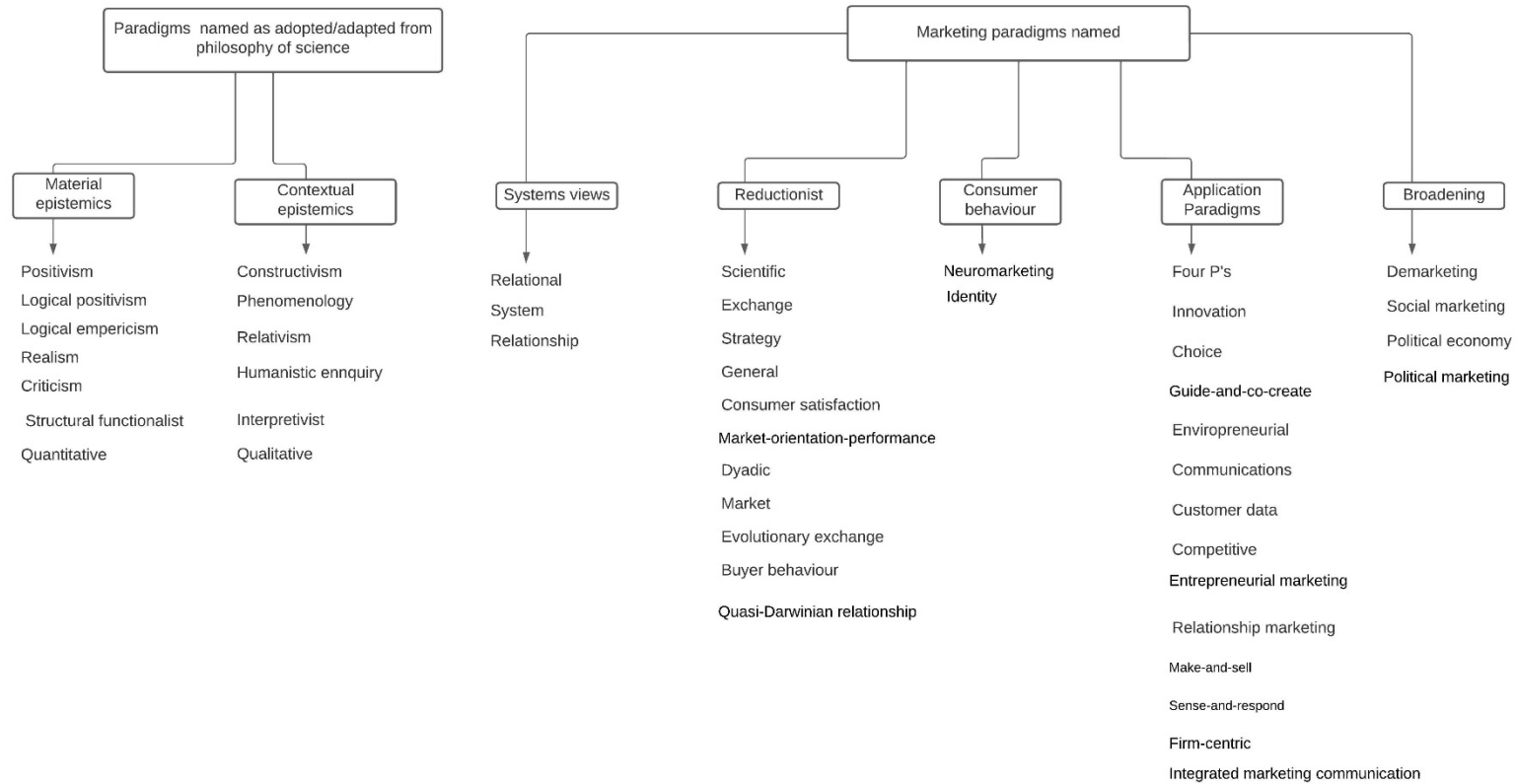
The role of yin-yang leadership and cosmopolitan followership in fostering employee commitment in China: A paradox perspective	Lee & Reade (2018)	<i>Cross Cultural & Strategic Management</i>	UK & USA	Cross cultural strategic management Yin-yang leadership construct
Regenerating the learning organisation: Towards an alternative paradigm	Pedler & Hsu (2019).	<i>Learning Organization</i>	China & UK	Management education
Purpose-driven leadership for sustainable business: From the perspective of Taoism	Zu, L. (2019)	<i>International Journal of Corporate Social Responsibility</i>	China	Purpose driven leadership and sustainable business (CSR)
Role of traditional Chinese philosophies and new product development under circular economy in private manufacturing enterprise performance	Subramanian, Gunasekaran, Wu, & Shen (2019)	<i>International Journal of Production Research</i>	UK, USA, & China	New product development Circular economy
A Daoist perspective on leadership: Reputation-	Li, Jones, Harvey, & Yang (2020)	<i>International Journal of Entrepreneurial</i>	UK & China	Leadership

building in Chinese SMEs.		<i>Behavior & Research</i>		
The yin and yang of outside-in thinking	Day (2020)	<i>Industrial Marketing Management</i>	USA	Marketing strategy Outside-in and inside-out approaches
The Tao of consumption: Private self in a collective culture	Huang, Yen, & Chen (2021)	<i>Journal of Service Theory and Practice</i>	Taiwan	Considers the role of self-concept and restorative servicescapes in a collective culture

3.2 Reviewed Materials: Marketing Thought

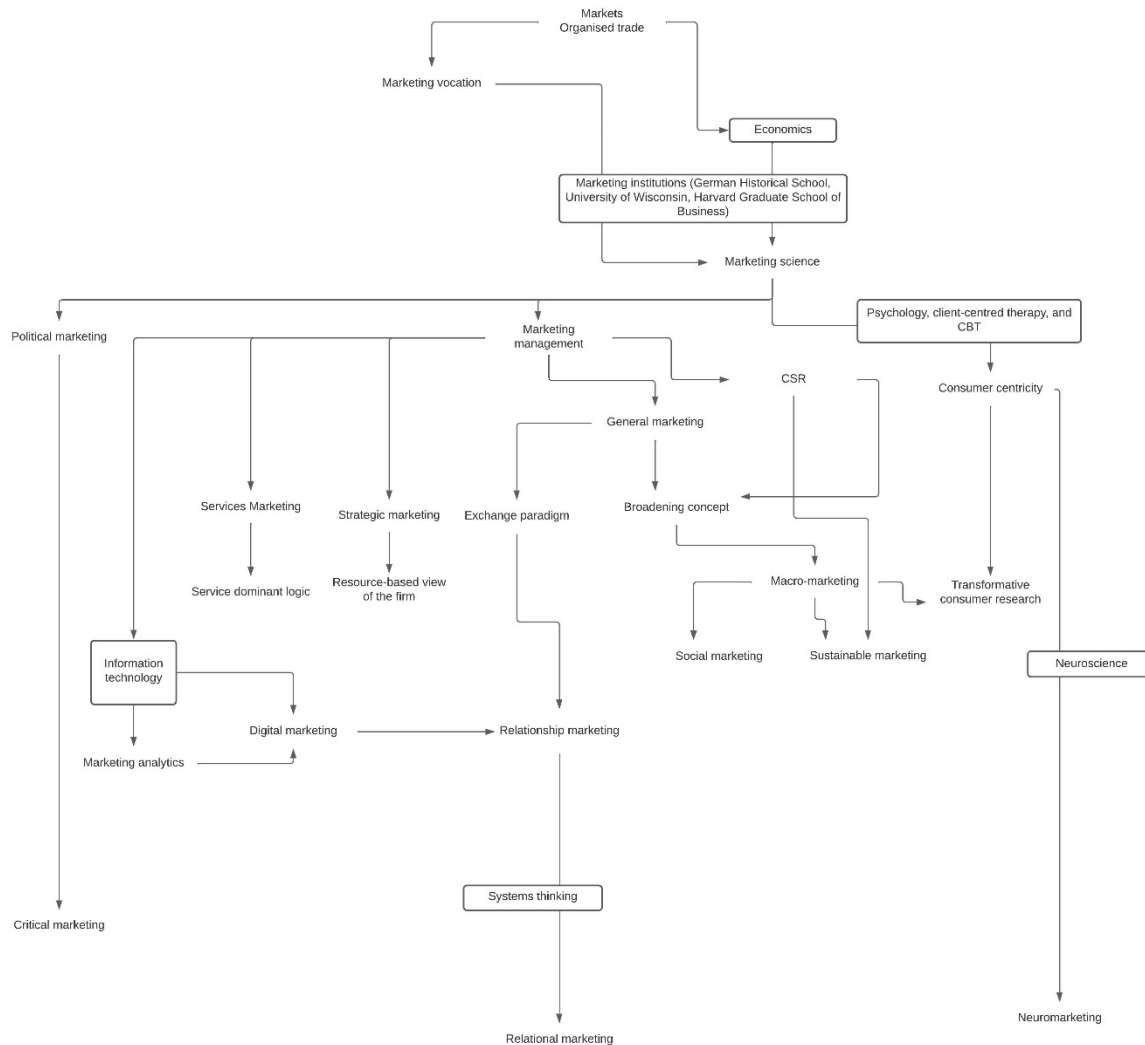
Given the focus on paradigmatic context and uncovering a ‘philosophical backbone’ of marketing, much of the reviewed literature employs either conceptual or historical methods. Through the reviewed literature (Table 3.2, Figure 3.1) more than 40 distinct paradigmatic approaches are presented within marketing thought. However, the use of the notion of paradigms appears to be employed in two distinct ways. The first is a paradigmatic typology adopted from the philosophy of science. Authors following this approach tend to frame the discussion in terms of ontology, epistemology, and method before either discussing the dominance of one paradigm or presenting a case for the shift towards a different approach (Arndt, 1985; Barker et al., 2001; Deshpande, 1983; Lemel, 1993; Lindgreen, 2001; Lutz, 1989; Healy & Perry, 2000; Pels & Saren, 2006; Reidenbach & Robin, 1991; Venkatesh, 1985). In contrast, some papers name a ‘new’ paradigm of marketing, while not always specifying what philosophical stance it rests upon.

Figure 3.1 *Paradigms named in marketing thought*



In the reviewed literature on marketing thought (Table 3.2), there is also an apparent dominance of American-based researchers, with 58% (68) of the reviewed papers having an institutional affiliation in the United States of America. Second most common is an institutional affiliation in the United Kingdom at 17% (20) and just 9% (11) were conducted cross-culturally. While this may, at least in part, be a product of limiting searches to those studies written in English, it also presents a hegemony of Anglo-American institutional and cultural influences. This limits both the breadth of market contexts for research and the array of cultural perspectives used to engage with questions of marketing, exchange, and consumption.

Another layer of complexity is added through the changing fields or subdomains within the literature. When viewed chronologically, the change in language demonstrates how the scope of marketing thought has changed through time – from marketing as exchange, to need creation and exchange, to marketing as relationship. This discourse appears to be predominantly predicated on the assumption that marketing occurs in a separate domain from natural processes and frequently, although not exclusively, as distinct and separate from other social forces. However, there is concurrent use of terms and concepts adopted from natural and physical sciences such as life cycle, organism, and ecosystem. There is also an implication of some un-malleable quality of marketing or ‘truth of marketing’ that cannot be changed, although what that is remains contentious. Over time, there is some increase in self-awareness of the influence of marketing thought as well as a gradual increase in variation of the geographic locations of the authors. However, there is a general lack of focus on regarding the fidelity of mapped models to marketplace events. Across somewhat arbitrary distinctions between paradigms, it is evident that the flow of information between research groups or adherents to a particular paradigm is markedly limited.

Figure 3.2*Morphology of marketing thought*

Note. This figure represents an indicative flow of field shifts and some corresponding theories of influence in the reviewed literature (Table 3.2).

Table 3.2*Summary of Reviewed Research: Marketing thought*

Title	Author/s (year)	Publication	Country of Institutional Affiliation	Research Focus and/or Theoretical Frameworks	Paradigms Named
Charles Coolidge Parlin	Alderson (1956)	<i>Journal of Marketing</i>	USA	Biography of Charles Coolidge Parlin “The consumer is king (p.2)”	Scientific marketing
The concept of the marketing mix	Borden (1964)	<i>Journal of Advertising Research</i>	USA	Marketing as both art and science	
The general theory of marketing	Bartels (1968)	<i>Journal of Marketing</i>	USA	Presents seven sub-theories of a general theory of marketing that assumes marketing is a universal, culturally oriented system of social interaction	Broadening
Self-actualization and product perception	Hamm & Cundiff (1969)	<i>Journal of Marketing Research</i>	USA	Self-congruence theory Client-centred therapy	

				Experimental design	
The morphology of theory and the general theory of marketing	Hunt (1971)	<i>Journal of Marketing</i>	USA	Argues Bartell's seven sub-theories of marketing are not theories but heuristics	
Demarketing, yes demarketing!	Kotler & Levy (1971)	<i>Harvard Business Review</i>	USA	Marketers' role as manipulating demand in service to long-term goals	Demarketing
				Suggests marketers can and should deter 'undesirable' customers	
Social marketing: An approach to planned social change	Kotler & Zaltman (1971)	<i>Journal of Marketing</i>	USA	Marketing as applicable to social structures outside market settings	Social marketing
A generic concept of marketing	Kotler (1972)	<i>Journal of Marketing</i>	USA	Marketing as exchange and the function of creating value	Broadening
				Generic concept of marketing	
				Marketing as the attempt to produce a desired response	
Marketing as an organized behavioral system of exchange	Bagozzi (1974)	<i>Journal of Marketing</i>	USA	Puts forward that any theory of marketing as exchange must satisfy two requirements a) the	

				structure of exchange relationship must be satisfied	
				b) the theory should allow for positive and negative actions on both parties	
Self concept, ideal self concept, and consumer purchase intentions	Landon (1974)	<i>Journal of Consumer Research</i>	USA	Self-congruence theory	
Is all social exchange marketing?	Ferrell & Zey-Ferrell (1977)	<i>Journal of the Academy of Marketing Science</i>	USA	Exchange theory Marketing science	Exchange
Is all social exchange marketing?: A reply	Bagozzi (1977)	<i>Journal of the Academy of Marketing Science</i>	USA	Marketing as dyadic exchange	Dyadic
A suggested taxonomy for marketing thought: The case of lacking applied development and research in marketing	Vidali (1977)	<i>Journal of the Academy of Marketing Science</i>	USA	Presents taxonomy for marketing theories as prescriptive/descriptive, general/specific	Scientific marketing
A general paradigm of marketing	Hunt (1978)	<i>Journal of Marketing</i>	USA	Three dichotomies model -	General

				micro/macro, profit sector/nonprofit sector, and positive/normative	
Letters to the editor	Robin (1978)	<i>Journal of Marketing</i>	USA	Rebuttal to Hunt's (1978) positive/normative model	
Markets and the satisfaction of human wants	Lane (1978)	<i>Journal of Economic Issues</i>	USA	Markets satisfy price-indexed wants first and general well-being second	
				Uncredited quote from 'The world is too much with us' by William Wordsworth "Getting and spending we lay waste our powers." (p.822)	
A paradigm for developing better measures of marketing constructs	Churchill (1979)	<i>Journal of Marketing Research</i>	USA	Emphasis on measurement as the means to improve marketing research	Scientific marketing
				Outlines quantitative system of measurement for marketing using example of job satisfaction scale	
Resolving the crisis in marketing thought	Dawson (1979)	<i>Management International Review</i>	USA	Kuhn's model of scientific revolution	Scientific marketing

				Marketing as science of human needs and wants	
Marketing for human needs in a humane future	Dawson (1980)	<i>Business Horizons</i>	USA	Critiques ‘American-ideal’ and assumption that the marketing brand of development is harbinger of general wellbeing	
A rejoinder: Is all social exchange marketing? A reply	Zey-Ferrell & Ferrell (1980)	<i>Journal of the Academy of Marketing Science</i>	USA	Debates concept of marketing as exchange	
What do we know about how research works?	Channon (1982)	<i>Journal of the Market Research Society</i>	USA	Typology of marketing paradigms into words (qualitative) and numbers (quantitative)	Quantitative Qualitative
				Puts forward that both have different uses	
The experiential aspects of consumption: Consumer fantasies, feelings, and fun	Holbrook & Hirschman (1982)	<i>The Journal of Consumer Research</i>	USA	Experiential model of consumer behaviour	
The political economy paradigm: Foundation for theory building in marketing	Arndt (1983)	<i>Journal of Marketing</i>	Norway	Review microeconomic formulation of marketing, then outlines an alternative in the integrative political economy paradigm	Political economy

Marketing theory with strategic orientation	Day & Wensley (1983)	<i>Journal of Marketing</i>	USA	Resource-based view of the firm Emphasis on competitive advantage	
“Paradigms lost”: On theory and method in research in marketing	Deshpande (1983)	<i>Journal of Marketing</i>	USA	Presents logical positivism as dominant paradigm and argues for a blend of qualitative methods for theory development and quantitative methods for testing	Logical positivism
General theories and the fundamental explananda of marketing	Hunt (1983)	<i>Journal of Marketing</i>	USA	Posits that a general theory of marketing would explain buyer behaviour, seller behaviour, the institutional frameworks that facilitate exchange, and social consequences of buying/selling	
An alternative paradigm for marketing theory	Dixon & Wilkinson (1984)	<i>European Journal of Marketing</i>	Netherlands, Denmark, & Australia	Proposes functionalist paradigm in which marketing activities exist in the context of a hierarchy of marketing systems Kuhn’s normal science	Functionalist
On making marketing science more scientific: Role of orientations,	Arndt (1985)	<i>Journal of Marketing</i>	USA	Four world views presented as the logical empiricist, sociopolitical, subjective world, and liberating paradigms	Logical empiricism (dominant) Criticism

paradigms, metaphors,
and puzzle solving

Constructivism

Consumer behavior from a contemporary philosophy of science perspective: An organizational framework	Bristor (1985)	<i>Advances in Consumer Research</i>	USA	Rejects a general theory of consumer behaviour as either feasible or appropriate Rejects logical empiricism in favour of contemporary philosophy of science	Logical empiricism
Does logical empiricism imprison marketing?	Hunt & Speck (1985)	<i>Research in Marketing</i>	USA	Puts forward that marketing thought is not solely dominated by logical empiricism, but that the minds of some researchers may be	
Marketing—a retrenchment exercise	Seymour (1985)	<i>Research in Marketing</i>	USA	Presents Four P's as dominant content paradigm and hypothetic deduction as dominant method paradigm with phenomenology as the alternative	Four P's Hypothetic deduction Phenomenology
Is marketing ready for Kuhn?	Venkatesh (1985)	<i>Research in Marketing</i>	USA	Uses Kuhnian framework to argue that marketing is in crisis and a combination of positivist and interpretivist enquiry is required	Logical empiricism (dominant)

				Focus on epistemology and method	
Humanistic inquiry in marketing research: Philosophy, method, and criteria	Hirschman (1986)	<i>Journal of Marketing Research</i>	USA	Presents positivist enquiry as dominant paradigm and puts forward humanistic enquiry as alternative	Positivist enquiry Humanistic enquiry
Time, space and competition	Savitt (1986)	<i>Managerial & Decision Economics</i>	USA	Critiques static (neo classical microeconomic) theories of competition and presents a dynamic (temporal/spatial) approach	
Marketing as innovation the eighth paradigm	Simmonds (1986)	<i>Journal of Management Studies</i>	UK	Innovation (focused activities of marketers) as the 'eighth' marketing paradigm. Additional paradigms referenced are differential advantage, motion or activity, management and political economy (Arndt, 1983)	Innovation Market System Consumer satisfaction, Choice Exchange Conflict
Organizational culture and marketing: Defining the research agenda	Deshpande & Webster (1989)	<i>Journal of Marketing</i>	USA	Proposes five cultural paradigms for organisational theory of comparative management, contingency management, organizational	Structural functionalist (dominant)

				cognition, organizational symbolism, and structural/psychodynamism	
Positivism, naturalism and pluralism in consumer research: Paradigms in paradise	Lutz (1989)	<i>Advances in Consumer Research</i>	USA	Urges integration of a broader range of paradigms and increase in philosophical education for marketing PhDs.	Positivism (dominant)
Early development of the philosophy of marketing thought	Jones & Monieson (1990)	<i>Journal of Marketing</i>	USA	Significance of institutions in the development of marketing thought -University of Wisconsin, Harvard Graduate School of Business	
				Influence of the German historical school	
Internal analysis of market structure: Recent developments and future prospects	Elrod (1991)	<i>Marketing Letters</i>	Canada	Compares six models of consumer decision making	Buyer choice behaviour (dominant)
				Buyer choice behavior presents that consumer choices reflect buyer evaluations of the attributes possessed by alternatives	
				Internal market structure analysis - seeks to recover the attributes and corresponding buyer evaluations	
				Quantitative method	

Historiographic paradigms in marketing	Jones (1991)	<i>Conference on Historical Analysis and Research in Marketing</i>	USA	Presents two paradigms for historical research in marketing – scientific and traditional	
Marketing is everything	McKenna (1991)	<i>Harvard Business Review</i>	USA	Technology developments in the 1990s mean a new (unnamed) paradigm in marketing in which all businesses begin to function as if the whole company is a marketing company “The goal of marketing is to own the market (p. 70)”	
Epistemological structures in marketing: Paradigms, metaphors, and marketing ethics	Reidenbach & Robin (1991)	<i>Business Ethics Quarterly</i>	USA	Critiques the logical empiricism paradigm as amoral as influenced by the war metaphor (Porter), the organism metaphor (Alderson) and the instrumental man	Logical empiricism (dominant)
Toward a new paradigm for marketing the evolutionary exchange paradigm	Kiel & Lusch (1992)	<i>Behavioral Science</i>	USA	Presents how marketing exchange is part of evolutionary exchange systems that are commonly discussed in the natural sciences	Evolutionary exchange

				Stresses how conventional marketing has failed to incorporate human exchange into a larger intellectual framework of other types of exchange	
The shifting paradigm in marketing research	Perreault (1992)	<i>Journal of the Academy of Marketing Science</i>	USA	Discusses influence of technological developments (data processing) on marketing and urges integration of technology into the curriculum	
Scientific inquiry in marketing: An empirical investigation	Lemel (1993)	<i>American Business Review</i>	USA	Presents positivism and relativism as two main paradigms	Positivism Relativism
				Calls for 'daring innovation' in research method	
The impact of the marketing communications paradigm shift	Schultz (1993)	<i>Journal of Direct Marketing</i>	USA	Paradigm shift from one-way communication to two-way through data collection technology	Communications
				Shift from seller to buyer as most significant 'unit' in marketing	

Critical theory and consumer marketing	(Alvesson, 1994)	<i>Scandinavian Journal of Management</i>	Sweden	Critical theory	
				Presents marketing as mystification or cultural doping	
Quo vadis, marketing? Toward a relationship marketing paradigm	(Grönroos, 1994)	<i>Journal of Marketing Management</i>	Sweden	Marketing mix as paradigm	Marketing mix
				Presents relationship marketing as alternative	Relationship marketing
				“The relationship marketing approach is a return to the "natural" systems-oriented way of managing customer relationships that existed before marketing became a far too clinical decision-making discipline, and an over organized and isolated function (p. 356)”	
A new marketing paradigm: Share of customer, not market share	Peppers & Rogers (1995)	<i>Planning Review</i>	USA	Computer-based relationship marketing introduced as response to technological changes	Relationship marketing
The new marketing paradigm	Holliday (1996)	<i>U.S. Banker</i>	USA	Customer data as new paradigm	Customer data
				“The ability to make intelligent marketing decisions through skillful manipulation of	

				customer information that in many instances a bank already possesses is crucial to that effort”	
Changes in the theory of interorganizational relations in marketing paradigm	Achrol (1997)	<i>Journal of the Academy of Marketing Science</i>	USA	Speaks to expected turbulence in the 20 th Century and the need for network-based marketing (as opposed to dyadic and exchange) to respond to these changes	Dyadic/Exchange Network marketing
				Shift to relational marketing	
Towards a paradigm shift in marketing? An examination of current marketing practices	Brodie et al. (1997)	<i>Journal of Marketing Management</i>	New Zealand & Canada	Challenges idea of shift to relationship marketing paradigm	Transactional Relational
				Relationship marketing as concurrent with traditional transactional/exchange approaches	
Marketing in transition conditions	Meler (1997)	<i>Eastern European Economics</i>	Croatia	Challenges Kotler (1972) generic concept. Marketing as highly contextual and reliant on social and economic systems (uses example Croatia following Croatian War of Independence (1991-1995))	

Enviropreneurial marketing strategy: The emergence of corporate environmentalism as market strategy	Menon & Menon (1997)	<i>Journal of Marketing</i>	USA	Environmentalism as being incorporated into mainstream marketing thought as one possible strategic approach Recommends psychometric methods for measuring enviropreneurial marketing	Enviropreneurial marketing
Intimacy or intrusion? The privacy dilemma for relationship marketing in consumer markets	O'Malley et al. (1997)	<i>Journal of Marketing Management</i>	UK	Discusses relationship marketing as falling short of the requirements of a true relationship (dialogue, mutual commitment, trust)	Relationship marketing
Twenty-first-century organizations: Implications for a new marketing paradigm	Snow (1997)	<i>Journal of the Academy of Marketing Science</i>	USA	Indicates shift from dyadic paradigm to network paradigm Employs metaphor of network anatomy and physiology	Dyadic Network
Examining the impact of market-based strategy paradigms on marketing strategy	Cravens (1998)	<i>Journal of Strategic Marketing</i>	Canada & New Zealand	Suggests a move away from the marketing function towards a market	Strategy Market-driven Relationship marketing
Implementation requires a relationship marketing paradigm	Gummesson (1998)	<i>Journal of the Academy of Marketing Science</i>	Sweden	Systems-thinking and action research	Relationship marketing

Competitive positioning and the resource-based view of the firm	Hookey et al. (1998)	<i>Journal of Strategic Marketing</i>	UK	Resource-based view of the firm Competitive advantage	
Marketing implementation: The implications of marketing paradigm weakness for the strategy execution process	Piercy (1998)	<i>Journal of the Academy of Marketing Science</i>	UK	Argues for processual approach	Relationship marketing
A framework for the examination of relational ethics: An interactionist perspective	Pelton et al. (1999)	<i>Journal of Business Ethics</i>	USA	Argues for relational paradigm over dyadic relationship paradigm Presents exchange as widely accepted ontology of marketing	Relational Dyadic relationship
Extending the competitive marketing paradigm: The role of strategic reference points theory	Shoham & Fiegenbaum (1999)	<i>Journal of the Academy of Marketing Science</i>	Israel	Strategic reference point theory	Competitive marketing
Evolving paradigm for environmental sensitivity in marketing programs: A synthesis of theory and practices	Menon & Menon (1999)	<i>Journal of Marketing Theory</i>	USA	Presents 1990s as decade for the environment in marketing Argues for strategic advantage of adopting environmentalism	

Interpretive consumer research: How far have we come?	Szmigin & Foxall (2000)	<i>Qualitative Market Research: An International Journal</i>	UK	References dominance of epistemology in previous debates Presents interpretive approach as art of research and positivist as science and argues for the inclusion of both	Interpretivist Positivist
Comprehensive criteria to judge validity and reliability of qualitative research within the realism paradigm	Healy & Perry (2000)	<i>Qualitative Market Research: An International Journal</i>	Australia	Presents the aim of marketing research as explaining and describing social science phenomena and describes method for assessing qualitative research quality within realism	Realism Positivism Critical theory Constructivism
A framework for studying relationship marketing dyads	Lindgreen (2001)	<i>Qualitative Market Research: An International Journal</i>	Denmark	Dyadic relationship marketing	Positivism Relativism Realism
Informed eclecticism: A research paradigm for the twenty-first century	Barker et al. (2001)	<i>International Journal of Market Research</i>	UK	Postivist paradigm and phenomenological/interpretivist paradigm as dominant two Informed eclecticism described as methods should be chosen appropriate to the problem	Positivist Interpretivist Informed eclecticism

"Teach ten thousand stars how not to dance": A survey of alternative ontologies in marketing research	Chung & Alagaratnam (2001)	<i>Qualitative Market Research: An International Journal</i>	USA	Functionalist and interpretivist as two dominant paradigms	Functionalist Interpretivist
The social construction of new marketing paradigms: The influence of personal perspective	Palmer & Ponsonby (2002)	<i>Journal of Marketing Management</i>	UK	Presents that 'new paradigms' are largely recycled ideas	
Evolving relationship marketing into a discipline	Sheth & Parvatiyar (2002)	<i>Journal of Relationship Marketing</i>	USA	Relationship marketing paradigm	Relationship marketing
Emerging macromarketing concepts: From Socrates to Alfred Marshall	Dixon (2002)	<i>Journal of Business Research</i>	USA	Considers relationship between markets and other social structures	
Extending the vision of social marketing through social capital theory: Marketing in the context of intricate exchange and market failure	Glenane-Antoniadis et al. (2003)	<i>Marketing Theory</i>	Australia UK	Social capital theory	Broadening marketing

'We are all customers now....' rhetorical strategy and ideological control in marketing management texts	Hackley (2003)	<i>Journal of Management Studies</i>	UK	Views marketing as ideology Criticises 'definitional fervour'	Critical paradigm
Scholarly research in marketing: Exploring the "4 eras" of thought development	Wilkie & Moore (2003)	<i>Journal of Public Policy & Marketing</i>	USA	Marketing as a fragmented field of thought, in crisis, with a need for new methods for doctoral education	
Paradigm mapping marketing theory	Lowe et al. (2004)	<i>The Journal of Consumer Marketing</i>	UK Australia	Uses Capra (1997) web of life incorporating pattern, process, structure for processual view over static paradigm typology Argues for more philosophically directed marketing discourse	
The role played by the broadening of marketing movement in the history of marketing thought	Kotler (2005)	<i>Journal of Public Policy & Marketing</i>	USA	Broadening movement presented as an effort to free the marketing paradigm from the limitations of commercial settings	Broadening paradigm
A history of schools of marketing thought	Shaw & Jones (2005)	<i>Marketing Theory</i>	USA	Schools of marketing thought as: marketing management, systems, consumer behavior,	

				macro marketing, exchange, and historical. With marketing management, consumer behavior, and exchange all being subject to the broadening paradigm since the 1970s, through which marketing became about more than just commercial interests.	
Market orientation, marketing innovation as performance drivers: Extending the paradigm	Shergill & Nargundkar (2005)	<i>Journal of Global Marketing</i>	India & New Zealand	Extending the market-orientation-performance paradigm to include innovation	Market-orientation-performance
Services in society and academic thought: An historical analysis	Vargo & Morgan (2005)	<i>Journal of Macromarketing</i>	USA	Argues for a shift from dominant goods-centered paradigm to services view	
The past, present and future of relationship marketing	Harker & Egan (2006)	<i>Journal of Marketing Management</i>	UK	Kuhn's normal science	Transactional (dominant) Relationship
The service-dominant logic of marketing: Dialog, debate, and directions	Lusch & Vargo (2006)		USA	Presents the process of service provision as the fundamental purpose of all marketing and economic exchange and presents this view as a dominant logic for marketing thought	Service-dominant logic

The 4ps of relational marketing, perspectives, perceptions, paradoxes and paradigms learnings from organizational theory and the strategy literature	Pels & Saren (2006)	<i>Journal of Relationship Marketing</i>	Argentina Scotland	Positivist and interpretivist as dominant two paradigms, with a shift into pluralist approach	Positivist Interpretivist
The ordering of marketing theory: The influence of McCarthyism and the cold war	Tadajewski (2006)	<i>Marketing Theory</i>	UK	Marketing theory itself is a process of marketing Paradigm debates presented as a distraction from more substantive questions regarding the relationship between power and knowledge	
Quasi-darwinian selection in marketing relationships	Eyuboglu & Buja (2007)	<i>Journal of Marketing</i>	USA	Quasi-Darwinian selection posited as a driving factor in market-place survival alongside cause and effect Social exchange theory	Quasi-Darwinian relationship
Neuromarketing: A layman's look at neuroscience and its potential application to marketing practice	Fugate (2007)	<i>The Journal of Consumer Marketing</i>	USA	Presents neuroimaging as a potential tool for reassessing and rebuilding models of consumer behaviour	Neuromarketing

The transaction-relational continuum: Conceptually elegant but empirically denied	Palmer (2007)	<i>Journal of Business & Industrial Marketing</i>	UK	Challenges dyadic relationship paradigm	Dyadic-relationship Realism
Application of the relationship paradigm to social marketing	Raval et al. (2007)	<i>Competition Forum</i>	USA	Social marketing	Relationship
Implications of the revised definition of marketing: From exchange to value creation	Sheth & Usley (2007)	<i>Journal of Public Policy & Marketing</i>	USA	Supports shift from exchange paradigm to relationship paradigm	Exchange Relationship
Kotler and Borden are not dead: Myth of relationship marketing and truth of the 4ps	Zineldin & Philipson (2007)	<i>Journal of Consumer Marketing</i>	Sweden	Shift towards relationship paradigm viewed as a myth	Relationship
Identity based marketing: A new balanced marketing paradigm	Alsem & Kosteljik (2008)	<i>European Journal of Marketing</i>	Netherlands	Outlines marketing paradigm as consumer-side and strategy as production side. Proposed brand identity-based marketing paradigm which prioritises the influence of branding.	Marketing Strategy Identity
Articles of faith and mystic matrices: Marketing textbooks and the	Ardley (2008)	<i>Qualitative Market Research</i>	UK	Uses phenomenological interviews to demonstrate marketing as highly contextual and localized, as contrasting with the general models	Interpretivist

misrepresentation of reality				presented in marketing textbook	
Marketing: Philosophy of science and “epistobabble warfare”	Rod (2009)	<i>Qualitative Market Research: An International Journal</i>	Canada	Argues that one specific philosophical paradigm should not have dominance in marketing thought Recommends the adoption of a natural ontological attitude	
Marketing paradigm: Transition from MC to IMC	Dmitrijeva & Batraga (2012)	<i>Economics & Management</i>	Latvia	Marketing communication paradigm to integrated marketing communication	Integrated marketing communication
The paradigmatic pitfalls of customer-centric marketing	Osborne & Ballantyne (2012)	<i>Marketing Theory</i>	New Zealand	Argues that despite shift in language toward customer-centric and relationship models, marketing is still largely firm-centric	Firm-centric
Scientific marketing management and the emergence of the ethical marketing concept	Tadajewski & Jones (2012)	<i>Journal of Marketing Management</i>	UK USA	Outlines the influence of scientific management on marketing through the work of Percival White and Frederick Taylor	
Seeing through smoke and mirrors: A critical analysis of marketing CSR	Prasad & Holzinger (2013)	<i>Journal of Business Research</i>	Australia Canada	Corporate social responsibility	
Paradigm debates and marketing theory,	Tadajewski (2014)	<i>Journal Of Historical</i>	UK	Paradigm debates as not exclusively concerned with	

thought and practice: From the 1900s to the present day		<i>Research in Marketing</i>		truth and knowledge, but also deeply political and inter- subjective	
Marketing, marketing systems, and the framing of marketing history	Layton (2015)	<i>Journal Of Historical Research in Marketing</i>	Australia	Historical systems view of marketing as a social discipline	
Characterising marketing paradigms for sustainable marketing management	Hurth & Whittlesea (2017)	<i>Social Business</i>	UK	Presents three alternative paradigms for marketing as make-and-sell, sense-and- respond, guide-and-co-create.	Make-and-sell Sense-and- respond Guide-and-co- create
Political marketing: Bringing politics and marketing together	Kumar & Dhamija (2017)	<i>ITI HAS - The Journal of Indian Management</i>	India	Examines the role of marketing in political contexts	Political marketing
Entrepreneurial marketing management: The new paradigm	Majovski & Davitkovska (2017)	<i>Economic Development</i>	North Macedonia	Entrepreneurial marketing presented as a proactive opportunity-based marketing orientation	Entrepreneurial marketing
Marketing (as) rhetoric: Paradigms, provocations, and perspectives	Brown et al. (2018)	<i>Journal of Marketing Management</i>	UK, USA, & Canada	Emphasis on the importance of rhetoric in marketing	
Marketing's identity crisis: Insights from	El-Ansary et al. (2018)	<i>AMS Review</i>	USA	Addresses internal inconsistencies as a result of the broadening/generic	

the history of
marketing thought

paradigm and proposes
marketing systems paradigm

Dead-end
development or real
progress? Paradigm
shift initiatives in
marketing theory

Kelemen-Erdős
(2019)

*Proceedings of
the
International
May Conference
on Strategic
Management*

Hungary

Grounded theory used to
interrogate flaws in service-
dominant logic as emerging
paradigm

GDPR and data
powered marketing:
The beginning of a
new paradigm

Menon (2019)

*Journal of
Marketing
Development*

USA

Privacy regulation in the EU as
leading data-driven marketing

The unwitting
corruption of
broadening of
marketing into
neoliberalism: A beast
unleashed?

Dholakia et al.
(2020)

*European
Journal of
Marketing*

USA

Turkey

Broadening paradigm as neo-
liberalism

Broadening
paradigm

Critical
marketing

The impact of covid-
19 pandemic on
corporate social
responsibility and
marketing philosophy

He & Harris
(2020)

*Journal of
Business
Research*

UK

Argues that Covid-19 may
serve as a catalyst for more
genuine corporate social
responsibility

Alternative paradigms
for sustainability: A
relational worldview

Kennedy et al.
(2020)

*European
Journal of
Marketing*

New
Zealand

UK

Compares dominant social
paradigm (DSP) with relational
worldview

Dominant social
paradigm

New areas of research in marketing strategy, consumer behavior, and marketing analytics: The future is bright	Sheth (2021)	<i>Journal of Marketing Theory and Practice</i>	USA	Marketing as three sub-disciplines of marketing strategy, consumer behavior, and marketing analytics	
Macromarketing and the systems imperative	Wooliscroft (2021)	<i>Journal of Macromarketing</i>	New Zealand	Macromarketing and systems research	Macromarketing

Generally, at a technical level, there is an inconsistent level of direct clarity regarding what a paradigm is and how this notion applies to marketing thought. While the earlier paradigmatic debates are prosaic and difficult to read, there is at least some level of coherence between papers. In the papers aimed at introducing a ‘new paradigm’, paradigms named often appear as simulacra, or imitation paradigms – the same positions, or unclear positions are presented somewhat unconvincingly as new ideas. Multiple paradigms are named as the dominant one, both concurrently and across time. As discussed in following chapters, these dominant paradigms appear as most heavily rooted in a dichotomous model and materialist worldview. When addressing the competition between paradigms, there are two clusters presented which generally map to materialist and idealist approaches – whether a single truth exists, and whether epistemic certainty is possible or desirable. There are also cases in which the same word is used to represent very different things. For example, the word relationship is at times used interchangeably with relational, while in other contexts it is used interchangeably with dyadic exchange. This points to lack of clarity and a lack of face validity (Brennan et al., 2011; Jones & Shaw, 2018) within the literature.

The reviewed literature further demonstrates a change in meaning over time as well as a lack of semantic consensus (Tadajewski, 2004) regarding what constitutes a paradigm in marketing thought. In the more recent research, the results returned regarding philosophy are more closely aimed at considering the influence of a particular marketing paradigm on social outcomes. Where paradigms are named outside the classic typology, they are less explicit regarding the underlying worldviews, but often carry an implied correspondence with previously debated paradigms. Before revisiting this topic in Chapter 5, the following chapter introduces one alternate perspective based on *Taoist* philosophy.

Chapter 4: Exploration the First: Taoist Philosophy

The highest good is like water.

Water gives life to the ten thousand things and does not strive.

It flows in places men reject and so is like the Tao.

In dwelling, be close to the land.

In meditation, go deep in the heart.

In dealing with others be gentle and kind.

In speech, be true.

In ruling, be just.

In business, be competent.

In action, watch the timing.

No fight: No blame.

Tao Te Ching, (English & Feng, 1972, p.8)

4.1 Introduction to Taoism

Taoism is a ‘philosophy for life’ that is in harmony with the flow of nature or natural order (Capra, 1983; Cheng, 1994; English & Feng, 1972; Kirkland, 2004; Kohn & LaFargue, 1998; LaFargue, 1992; Sui Pheng, 2003). Since originating in China circa 3-4 BCE, iterations of *Taoism* have covered everything from practical guidelines for daily life to leadership, business and governance, spiritual practices, sexual teachings, rhythms of nature, and ideas about the role of human activity within the environment (Kirkland, 2004; Liu, 2017; Mou, 2012; Raz, 2012; Sui Pheng, 2003; Sutton-Brady et al., 2010). Kohn and LaFargue (1998) identify three categories of *Taoism*: philosophical (*Tao-Chia*), religious (*Tao-Chaio*), and folk *Taoism*. The former focuses on ideals for living in harmony with natural law, and the latter two are more directly concerned with religious and ceremonial practices. While all branches of *Taoism* have

characteristics that have merged, diverged, and changed over time, the focus of this thesis, and the cited literature, is *Taoist* philosophy (Li et al., 2011).

Taoism is often treated as a chiefly nature-based philosophy and likened to transcendentalism (Okker, 1987). However, it is more deeply based on the integration of human activity within natural order. At the same time, *Taoist* cosmology assumes a natural intelligence which is inclusive of, and present in, not only natural flora, fauna, and elements, but all things (Capra, 1983; Coll, 2021; English & Feng, 1972; Zhuangzi et al., 1974).

One of the underlying premises in *Taoist* philosophy is that the lessons within the written texts are merely signposts or metaphors for ineffable matters (Cheng, 1994; English & Feng, 1972; Kirkland, 2004; Li, 2016; Sui Pheng, 2003; Watson, 1968; Zhuangzi et al., 1974). In one English translation, this idea is simply expressed with the line “The *Tao* that can be told is not the eternal *Tao*” (English & Feng, 1972, p. 1). Or, more illustratively, in *Chuang Tzu*, “Name is only the shadow of reality (Zhuangzi, English & Feng, 1974, p. 10).”

The knowledge held in the verses is reached through contemplation:

The best way to approach Chuang Tzu is not through rational and systematic analysis but to re-read and re-read until one has developed an intuitive sense of the mind moving behind the words and of the world in which it moves (Watson, 1968, p.7).

Thus, with the *Tao* or natural flow of life as the basis for action, *Taoism* directs attention towards natural processes of growth and decay, and self-mastery through skillful timing and decision making that acts in harmony with the dynamic forces of the physical world (Watson, 1968).

Taoism alludes to an underlying level of neutrality (English & Feng, 1972; Kirkland, 2004; Watson, 1968; Zhuangzi et al., 1974). In contrast to the Anglo-Christian model of absolute right and wrong, or good and evil, *Taoist* ethics are treated as incidental to a natural way of living (Nelson, 2004). In the *Taoist* worldview, human activity is positioned between heaven and earth (English & Feng, 1972; Wilhelm & Baynes, 1968). However, the heaven concept also provides an example of the limits imposed by translation. Heaven is not presented as a synonym for a transcendent afterlife, as in Christianity, but is more reflective of the earth as part of the greater structure of the cosmos. Concurrently, the heaven concept reflects a principle of creativity by bringing new forms into expression (Nelson, 2004).

4.1.1 Core Texts

It is widely agreed that *Taoism* is centered around three principal texts: *Lao Tzu's Tao Te Ching* (Capra, 1983; English & Feng, 1972; Kohn & LaFargue, 1998; LaFargue, 1992; Rainey, 2014), *Chuang tzu (Zhuangzi or Inner Chapters)* (Capra, 1983; Mou, 2012; Rainey, 2014), and the *I Ching (I Jing or Book of Changes)* (Mou, 2012; Smith, 2012). Perhaps due to both their age and content matter, each of the texts have associated layers of mystery surrounding who wrote them and when. In some ways, it goes against comparable philosophical streams in that it subverts rationality and moral vision (Clarke, 2000). Despite this ambiguity, each serves a clear and differentiated purpose within *Taoist* living (Yi, 2016).

Tao Te Ching is one of the earliest and greatest influences on Chinese thought, proverbs, and folklore (English & Feng, 1972). As opposed to the governance-approach of *Confucianism*, it is primarily concerned with a spiritual level of being (English & Feng, 1972). On a more practical level, *Chuang Tzu* speaks to a life of freedom through living in alignment with *Tao* (Watson, 1968). In contrast to the more axiomatic approach of the *Tao Te Ching*, *Chuang Tzu* provides practical guidelines through 'skill stories' which demonstrate how mastery combined with conscious awareness of the present moment cultivates *wu wei* (non-action) (Lee, 2020). As in the example of Prince Wen Hui's cook:

Prince Wen Hui's cook was carving up an ox. Every touch of his hand, every heave of his shoulder, every step of his foot, every thrust of his knee, with the slicing and parting of the flesh, the zinging of the knife – all was in perfect rhythm, just like the Dance of the Mulberry Grove or a part in the Ching Shou symphony.

Prince Wen Hui remarked, "How wonderfully you have mastered your art."

The cook laid down his knife and said, "What your servant really cares for is Tao which goes beyond mere art. When I first began to cut up oxen, I saw nothing but oxen. After three years of practicing, I no longer saw the ox as a whole. I now work with my spirit, not my eyes. My senses stop functioning and my spirit takes over. I follow the natural grain, letting the knife find its way through the many hidden openings, taking advantage of what is there, never touching a ligament or tendon, much less a main joint."

*“A good cook changes his knife once a year because he cuts, while a mediocre cook has to change his every month because he hacks. I’ve had this knife of mine for nineteen years and have cut up thousands of oxen with it, and yet the edge is as if it were fresh from the grindstone. There are spaces between the joints. The blade of the knife has no thickness. That which has no thickness has plenty of room to pass through these spaces. Therefore, after nineteen years, my blade is as sharp as ever. However, when I come to a difficulty, I size up the joint, **look carefully, keep my eyes on what I am doing, and work slowly.** Then with a very slight movement of the knife, I cut the whole ox wide open. It falls apart like a clod of earth crumbling to the ground. I stand there with the knife in my hand, looking about me with a feeling of accomplishment and delight. Then I wipe the knife clean and put it away.”*

*“Well done!” said the Prince. “From the words of my cook, I have learnt secret of **growth.**”* (Zhuangzi, Feng & English, 1974, p. 55)

In this way, *Chuang Tzu* places emphasis on practical elements of *Taoism*, teaching about *wu wei* as exemplified by effortless mastery and the development of intuitive capacity through repetition (Watson, 1968).

To frame it in terms of the philosophy of science, the *Tao Te Ching* provides ontology (consensus on the nature of reality) (Tang, 2011), where *Chuang Tzu* illustrates method (how the search for knowledge is conducted) (Tang, 2011). The *I Ching* is perhaps further removed from the academic emphasis on logical rationalism, as it represents a model for *Taoist* living and decision making through archetypal patterns which would be difficult to measure or prove. It is inherently un-epistemic — the emphasis is on living, rather than knowing. What it deftly showcases is the implicate complexity contained in the simple relationship between two base-forces – *yin* and *yang* and the potential of each person as a microcosm of the wider intelligence of the universe (Ningchuan & Chen, 2014). In this way, the *I Ching* relies heavily on elemental metaphors, with no hard distinction between natural and human patterns of birth, growth, death, and decay. Different combinations of *yin* and *yang* lines are used to build 6-line images or hexagrams. Through these 64 hexagrams, the *I Ching* provides a language for inter-relation between the two fundamental energies of *yin*, and *yang* (Ningchuan & Chen, 2014).

The hexagram operates not as a predetermined, abstract, and codified intellectual representation or construct, but as a pure transformational structure to be maneuvered as a perceptual diagram (Ningchuan & Chen, 2014 p.241).

At this point, both for clarity and relevance to the marketing discipline, it seems appropriate to stress the indicative nature of *Taoist* philosophy. Rather than directly purporting literal truths, the *Tao te Ching*, *Chuang tzu*, and *I Ching* are representative of some underlying insight which can be realized through observation and awareness in action.

4.1.2 Core Concepts

4.1.2.1 Tao

The primary element of *Taoism*, the *Tao*, is represented by the symbol of *Taiji* or *Tai chi* (supreme-ultimate) (Lai, 2008), which is comprised of two opposing yet complementary forces of *yin* and *yang*. This unity of opposites that are at once conflicting and cohesive (Li, 2016) then act as the basis for the diverse expressions of life which are represented in the following passage as the ‘ten thousand things’.

The Tao that can be told is not the eternal Tao.

The name that can be named is not the eternal name.

The nameless is the beginning of heaven and earth.

The named is the mother of ten thousand things.

Ever desireless, one can see the mystery.

Ever desiring, one can see the manifestations.

These two spring from the same source but differ in name;

This appears as darkness.

Darkness within darkness.

The gate to all mystery.

Tao is considered as an unknowable, formless origin from which everything arises (Cheung & Chi-fai Chan, 2008; English & Feng, 1972; Rainey, 2014; Zhuangzi et al., 1974). As such,

Taoism is largely directed toward being in harmony with *Tao* which is also commonly referred to as natural order (Capra, 1983; English & Feng, 1972; Kohn & LaFargue, 1998; Lin et al., 2013; Mou, 2012; Sui Pheng, 2003; Young, 2011). The word *Tao* is also present in Confucianism, however in that context it is more literally translated to mean the way of something (Lin et al., 2013).

Tao is not presented as a noun, but more so a mode of being that is processual, in that it has an inherent quality of effortless flux or transformation and points to the intrinsic complementarity, difference, parity, and transformation of all things (Nelson, 2004). Often, poetic language is used to illustrate this radically different mode of perception to Cartesian-duality (Nelson, 2004). By contrast, *Taoism* is founded on a “binding flow of being and nothingness” (Liu, 2016, p. 271”).

4.1.2.2 Yin and yang

While *yin-yang* balancing is perhaps the most prevalent in Western adaptations of *Taoist* philosophy, it is also one that is more accessible to the rational-logician, as dichotomies occur in almost all areas of human enquiry (Cloke & Johnston, 2005). *Yin* is generally symbolic of soft power, femininity, and even numbers while *yang* represents hard strength, odd numbers, and masculinity (Chin et al., 2018). However, *Taoist yin-yang* makes a distinction between ‘real’ opposites which operate in dynamic harmony (one cannot exist without the other) and polarized mental opposites which dualistically label a hard difference between *this* and *that* (Li, 2016) – be it mind and body, masculine and feminine, or good and evil. By contrast, *yin-yang* implies each side of any dichotomy is emergent of and reliant on the other.

Duality can be regarded as a balance between paradox and dualism reframed as two relative, rather than absolute, constructs. in that each contains the seed of the other, cannot be completely transformed into the other, and opposites are partially complementary as well as conflicting (Li, 2016, p. 53).

4.1.2.3 Wu Wei

Wu wei as obtained through *nei-yeh* (inward-training) (LaFargue, 1992; Pedler & Hsu, 2019) reflects *Taoism*’s unique stance on personal mastery or self-realisation as an alignment with natural order or *Tao* (Lee, 2020). A *Taoist* approach presents non-action as the grounds for compassion and *wu-wei* as non-coercive, receptive activity (Nelson, 2004). Metaphorically, *wu wei* could be represented as paddling downstream, sailing with the prevailing wind, or going with

the grain. It advocates aligning your internal world (thoughts, feelings, and decisions) in time and in harmony with the flow of life and larger patterns of nature or the cosmos. At a more practical level, *Wu wei* is a type of highly skilled action akin to the concept of flow states in psychology (Barrett, 2011; De Prycker, 2011; Lee, 2020). *Wu wei* engages both habitual and attentive faculties of awareness and directs them toward an activity to the point of being absorbed in and at one with the activity (Lee, 2020).

4.1.2.4 *Ziran*

The Western view of nature is often framed as a human/nature dichotomy (Cloke & Johnston, 2005), which reifies the exertion of human-will upon nature to change the course of events. This view sees nature as object or objectified. By contrast, *Ziran* represents nature as processual and integrated (Liu, 2016).

Daoism does not call us to worship nature or being as a divine Other or as ourselves. Daoism instead calls for a transformed relation to life in which the human no longer sets itself apart from the Dao (Nelson 2004, p. 69).

From a *Taoist* perspective, there is no absolute dichotomy between humans and things — politics, business, and all human activity are established as part of the natural order of heaven and earth (Liu, 2016). In contrast to a Platonic view of immutable and unchanging reality, *Taoism* reflects perpetual change and sees perishing, death, or endings as natural, normal, and not necessarily negative.

Since Heidegger and Lao-Zhuang Daoism claim that the activity of the subject is the problem, it cannot be cured by another—although different—activity of that subject. Environmentalism undermines itself unless it realizes the letting, the non-power and non-usefulness, which truly transforms the human relationship to its context (Nelson, 2004, p. 70).

4.1.3 Taoist Influence on Western Thought

While not reaching the widespread popularity of Buddhist-based meditation *practices*, the *principles* of *Taoism* have influenced significant cross-cultural contributions across many domains of knowledge (Clarke, 2000; Coll, 2021). While not entirely-free from the distortion that comes with inter-cultural dialogue (Clarke, 2000), *Taoism* has been adopted in Western

contexts ranging from psychoanalysis (Coward, 1996) and mental health nursing (Banner, 2018) to systems thinking (Coll, 2021) and deep ecology (Clarke, 2000). It has also been sporadically adopted by spiritualists and post-Christian thinkers in the West, such as Allan Watts, in the 1960s and 1970s (Clarke, 2000), and more recently through the adoption of *Taoism*, *feng shui* and *tai chi* into the self-development industry.

Daoism is proving increasingly attractive to people who seek a form of spirituality and self-fulfillment which focuses on the experience of embodied existence within the living world rather than on a transcendent world beyond, and which offers a way of discovering meaning through reconnecting human life with its roots in nature (Coll, 2021, p. 3).

The *I Ching* has been referenced by physicists including Niels Bohr, who was inspired by *Taoist* yin-yang in devising his principle of complementarity in the effort to resolve wave/particle duality (Li, 2011). The early psycho-analyst Carl Gustav Jung was also heavily influenced by *Taoist* thought and took inspiration from the *I Ching* in the development of Jungian-archetypes (Coward, 1996). These influenced parties share an interest in complexity, chaos, and navigating unseen aspects that drive both individual and collective circumstances.

4.2 Taoist Philosophy in Business Research

The following review addresses the existing body of business research that adopts ideas from *Taoist* philosophy. Given the limited number of marketing papers on *Taoism*, this literature review has been broadened to include management literature that focuses on the investigation or application of *Taoist* philosophy, particularly given its implications for marketing practice. This review serves to explore the existing literature concerning *Taoist* philosophy in marketing and management research while identifying and discussing any variations in the treatment of *Taoist* concepts.

This review is structured according to three broad areas of research where *Taoist* concepts have been investigated or applied: organisational behaviour, leadership, and marketing. The sections have been arranged adopting the category terminology used by the authors or the journals in which the articles are published. The review also discusses the potential for further research within marketing where the application of *Taoist* philosophy is markedly more limited.

4.2.1 Taoist Concepts in Organisational Behaviour

In the context of organisational behaviour, the existing literature concerning *Taoist* philosophy is predominantly focused on qualitative theorisation. As such, the research focuses on the utility of the ideas rather than questions of truth (Llewelyn, 2003). The interest in *Taoist* ideas in organisational research has been partly attributed to market globalisation and the increased opportunities for inter-cultural collaboration. Sui Pheng (2003) describes the growth in Asian economies as a key driver for an increase in the amount of management research that is concerned with Eastern philosophies such as *Taoism*. In contrast to the more literal approach, Sui Pheng (2003) unpacks the mystic, esoteric, and intuitive nature of the *Tao Te Ching* and stresses the importance of experiential enquiry and depth rather than only surface level understanding.

Of the concepts within the *Taoist* canon, *ying-yang* or *yin-yang* balancing has received the most attention from organisational researchers (Day, 2020; Du et al., 2011; Li et al., 2012; Li et al., 2011; Luo & Zheng, 2016; Rhee & Sigler, 2005; Yuan & Chia, 2011). *Yin* and *yang* can be most simply described as two relational yet opposing forces which are both present to some degree in all things (Capra, 1983; English & Feng, 1972; Juemin, 2020). These two halves create the *Taiji* (supreme-ultimate) (Lai, 2008) symbol which is more commonly referred to in organisational behaviour research as simply *yin-yang* (Day, 2020; Durlabhji, 2004; Lee & Reade, 2018; Li et al., 2012).

While *yin-yang* is commonly treated in the management literature as an exclusively Eastern concept (Bai & Roberts, 2011; Baskin, 2011; Hsiang-Ju et al., 2010; Li, 2016), it is not completely asynchronous with existing theories for organisational behaviour. For example, Luo and Zheng (2016) note considerable overlap with Western management theories, such as organisational ambidexterity and co-opetition. Similar ideas have also been alluded to in texts as diverse as the Judeo-Christian Bible (Pinto, 2019) and articles in theoretical physics (Bhattacharjee, 2017; Wilczek, 2008).

Concerns have been raised with regards to inconsistency of the conceptualisation of *yin-yang* within organisational research. In this sense, social scientists employing scientific reasoning and empiricism are yet to successfully operationalise *Taoist* concepts in a systematic way (Hsiang-Ju et al., 2010; Li, 2016). For example, Hsiang-Ju et al. (2010) address a failure within the literature to fully realise the concepts of *yin* and *yang*. Specifically, the role of *yin* as being tranquility-

dominant is stated to be directly at odds with the dominance of mechanistic explanations of *yin-yang* balancing. A more nuanced point of view suggests *yin* contains a seed of *yang*, and vice versa, and that they are both present in all things (Fang, 2003; Lowe, 2001; Xing & Sims, 2012; Yuan & Chia, 2011).

Within quantitative research, there are two studies that use Hofstede's cultural index as the theoretical basis for enquiry (Ming-Jer, 2002; Tian et al., 2015). However, this model has been critiqued for glossing over Chinese philosophical values (Xing & Sims, 2012). Furthermore, the uncritical adoption of Hofstede's model has also often been brought into question, with concerns over the typification of *yin* as good and *yang* as bad when the Taoist point of view holds that everything embraces both energies (Fang, 2003; Lowe 2001).

The application of *yin-yang* theory in organisational behaviour continues to evolve. For instance, the subtlety of *Taoist yin-yang* balancing is addressed in depth by Li (2016) through a discussion of the limitations of Western logic. Aristotelian logic and Hegel's dialectic are each presented as being unable to deal with the inherent ambiguity and complexity of organisational contexts. While Aristotelian logic presents a 'this or that' point of view, Hegel's dialectic can be seen as retaining consistent parts of each side of an argument while rejecting those that are incompatible (Li, 2016). In contrast, *Taoist* logic is presented as *yin-yang* balancing which can be summarised as 'both/and'. *Yin-yang* theory has also been likened to concepts in theoretical physics such as paradox theory, complexity theory, and Bohr's principle of complementarity (Bhattacharjee, 2017; Luo & Zheng, 2016; Ming-Jer, 2002; Shomar, 2020). By applying the concept of *yin-yang* balancing, Li (2016) reframes the previously conceived negative problem of paradox as a solution for completeness, proposing that organisational research could balance logical analysis with intuitive imagination to further progress. Li (2016) further stresses the obligation for scholars to facilitate the blending of Eastern 'both/and logic' as applied to complex and ambiguous problems with Western 'either/or' logic being employed for more simple and certain tasks.

4.2.2 Taoist Models of Leadership

In line with the organisational behaviour research, studies of *Taoist* leadership make explicit references to a rapidly changing social world and the need for business models that reflect this (Dimovski et al., 2013). However, the leadership literature provides a broader view of *Taoist*

concepts ranging from *yin-yang* balancing and *wu-wei* (non-action) (Lai, 2008), to *guanxi* (inter-relation) (Du et al., 2011) and *nei-yeh* (inward-training) (LaFargue, 1992; Pedler & Hsu, 2019).

One Taoist concept that has been applied in leadership research, often in the context of Chinese diasporic networks, is *guanxi* (inter-relation) (Du et al., 2011). Tian et al. (2015) notes the previous emphasis on *Confucian guanxi* while also stressing the influence of *Taoist* philosophy on *guanxi* and its role as a factor in Chinese business ideals. This concept has most explicitly been applied to conflict management and international business where trust is treated as a foundational requisite for reaching strategic outcomes within a Chinese or cross-cultural context (Du et al., 2011; Mattsson & Tidström, 2015; Tian et al., 2015).

Parallels are commonly drawn between *Taoist* models of leadership and the Western model of servant leadership (Bai & Roberts, 2011; Ma & Tsui, 2015; Sui Pheng & Sirpal, 1995). One of the *Taoist* principles more frequently discussed in leadership research is that of *wu-wei* (non-action) (Lai, 2008; Subramanian et al., 2019) as a model for effective leadership. *Wu-wei* is conceptualised as a leadership approach which nurtures natural order rather than attempting to make things happen according to personal will (Dimovski et al., 2013). The role of chance within successful leadership in an organisation is also addressed (Bai & Roberts, 2011; Dimovski et al., 2013; Hwang, 2012; Sui Pheng, 2003; Xing & Sims, 2012; Yuan & Chia, 2011). Considering luck and synchronicity, Xing (2016) explores the poetic, illustrative, and narrative qualities of *Taoist* concepts, presenting them as metaphors that point toward ‘invisible truths’ that can guide effective leadership practices. Another core focus of the leadership research is the importance and benefits of self-cultivation through practices such as meditation and personal reflection (Cheung & Chi-fai Chan, 2008; Dimovski et al., 2013; Li et al., 2020; Sui Pheng, 2003; Sui Pheng & Sirpal, 1995; Xing, 2016; Xing & Sims, 2012).

While the principles of *Taoist* leadership have been richly observed and discussed in several case studies (Li et al., 2011; Lin et al., 2018; Ma & Tsui, 2015; Mattsson & Tidström, 2015; Xing & Starik, 2017), there is a gap in the literature for more systematic examination into the cultivation of these qualities within a greater range of methodological contexts (Li et al., 2020; Xing & Sims, 2012; Xing & Starik, 2017).

4.2.3 Taoist Concepts in Marketing

Within the marketing literature, *Taoist* philosophy has been only sporadically adopted or studied. *Taoist* ideas have been co-opted as a framework for Corporate Social Responsibility (CSR) (Wang & Juslin, 2009) and purpose-driven marketing (Chen et al., 2021; Su, 2019). *Taoist* treatments of change have also been applied as a comparative theory to business life cycles. For example, Young (2011), conceptualises *Tao* as creation over time and uses the *I Ching* as a framework for describing markets as unfolding fields of interactions akin to the natural phenomenon described in the *Taoist* canon.

Overall, the marketing literature is more generally concerned with how *Taoist* sensibilities may influence decision making. For example, Li (2016) addresses the *Taoist* emphasis on intuition and the corresponding role of subconscious processes in creative decision making. There are a small number of empirical studies with Chinese participants examining how *Taoist* traditions such as feng shui or divination using the *I Ching* (Smith, 2012) influence decision making in real estate purchasing (Wu et al., 2012), brand naming (Chang & Lii, 2008), and tourism (Dai et al., 2019). The focus on *feng shui* from the perspective of marketing psychology suggests the appeal to practical and aesthetic tendencies of *Taoist* consumers (Chang, 2009; Florenthal et al., 2013; Luk et al., 2012; Peng et al., 2012; Wu et al., 2012; Yau, 2012). Yau (2012) suggests that applying *feng shui* principles to product development and promotional materials could have an emotional influence and effect purchase intentions.

Taoist ideals have also been researched in the context of Circular Economy New Product Development (CE-NPD). In a quantitative study, Subramanian et al. (2019) quantify *Taoist* marketing practices on five measures; respect for individuality, members treated equally, compliance without arguing, leader allows for autonomy, and team members are not competing, in CE-NPD projects. Through structural equation modelling, these qualities are shown as having moderating effect which slows time to market of circular economy based new product development. This could be linked to the *Taoist* 'letting-go' approach which challenges goal-oriented and hierarchical approaches typical of Western and *Confucian* theories (Subramanian et al., 2019).

While the narrative literature provides interesting alternative viewpoints, the underlying implications of the *Taoist* approach for business and marketing practices are not substantially explored. For example, Mattsson and Tidström (2015) review the marketing literature on *yin-yang* without consideration of the root concepts of *Tao*, the ‘unknowable’ unity from which everything flows (English & Feng, 1972; Kohn & LaFargue, 1998). This is perhaps the most difficult to articulate yet most foundational idea within the philosophy and it has led to myriad discussions over whether it carries relativist or extreme-realist implications (Bhattacharjee, 2017; Capra, 1983; English & Feng, 1972; Kirkland, 2004; Kohn & LaFargue, 1998; LaFargue, 1992; Mou, 2012; Neville, 2002). In line with Bai and Roberts (2011), Baskin (2011) cites Capra (1983) in drawing a parallel between post-Newtonian complexity theory, quantum mechanics, and Chinese philosophy. While Capra (1983) is frequently cited for his direct application of *Taoist* ideas to physics (Baskin, 2011; Jancic & Zabkar, 2002; Li et al., 2012; Riehm, 2000), it is also worth noting that he, more accurately, addresses parallels between Eastern spiritual traditions including *Taoism*, *Hinduism* and *Buddhism* and the Copenhagen (quantum) interpretation in physics.

Throughout the marketing and management literature, there is some inconsistency regarding the core concepts of *Taoism* and their application. While organisational behavioural research presents *yin-yang* as the core concept in *Taoism* (Chin et al., 2018; Durlabhji, 2004; Hsiang-Ju et al., 2010; Yadong & Qinqin, 2016), the leadership literature focuses more heavily on *wu-wei* (Jones & Liu, 2017; Ma & Tsui, 2015; Sui Pheng, 2003). In contrast, the marketing literature almost exclusively focuses on *feng shui* with some mention of *guanxi*. Furthermore, there is lack of clarity in both the meaning and application of *Taoist* concepts. Most notably conceptions of *yin* and *yang* lack the dynamism of *Taoist* texts in that they are bluntly equated with masculine and feminine (Subramanian et al., 2019) instead of acknowledging the built-in paradox of unity in opposite (Li, 2016).

Overall, there is a gap in the marketing literature with respect to in-depth research that considers alternative worldviews in parallel with the predominant perspective. For example, a *Taoist* marketing perspective could be further employed to explore the interplay of logic and intuition within marketing from a core of self-reflection and mutual respect (Li, 2016). However, there is a need for greater synthesis of the variant definitions of *Taoist* concepts (Hsiang-Ju et al., 2010;

Li et al., 2020). One considerable bias within the literature is the focus on concepts from *Tao te Ching*, at the expense of *Chuang Tsu* and *I Ching*. *I Ching*, with its history as a divination tool, may be seen as being further removed from the Western-academic preference for empirically testable concepts.

The point of departure for a *Taoist* approach to marketing could be seen as a tendency to favour intuitive wisdom over rational knowledge, while also conceding the limitations of rational human intellect (Capra, 1983; Cheng, 1994; English & Feng, 1972; Sui Pheng, 2003; Watson, 1968; Zhuangzi et al., 1974). More practically, a *Taoist* approach may prioritise the role of awareness and experiential knowledge in the present as opposed to modelling from the past or projecting into the future (Sui Pheng, 2003). This approach also holds similarities with the effectual approach to entrepreneurship, in that it is based on the available resources in the present, what can be affordably lost rather than windfall gains, and the transfiguration of challenges into opportunity (Sarasvathy, 2001). Recommendations from a *Taoist* point of view may include tuning marketing efforts to a more inward focus or spending time each day in silent contemplation (Li, 2016; Sui Pheng, 2003). As demonstrated by these examples, if adopted in practice, the *Taoist* approach could have considerable implications in terms of marketing decision making, resource management, opportunity analysis, and measures of success. As will be elaborated further in later chapters, *Taoist* philosophy also offers insight into models of self-development that contrast the dominant conceptions of self that are currently employed in consumer psychology. Furthermore, framing the individual as a unique and yet inseparable part of the whole (*Tao*) holds relevance to macromarketing attempts to understand the interplay between marketing and broader social processes and structures. While less obvious, it also holds relevance to the study of marketing at a microlevel through the investigation of emergent properties within dynamic systems.

Chapter 5: Exploration the Second: Marketing Thought

5.1 Layers of Meaning and Paradigms in Social Science

The following exploration reviews the underlying philosophy of marketing thought and how it has changed over time. Because the concept of research paradigms is prevalent across social sciences (Tang, 2011) and central to the institutional influence on marketing thought, the notion of paradigms is used, in part, to frame the following section which explores marketing as a cultural artefact.

A paradigm represents the conventions, beliefs, and assumptions of a group of researchers (Willis, 2007). At the basic level, each paradigm consists of an ontology (consensus on the nature of reality), epistemology (consensus on what it means to know), and finally, the research methods (how research is conducted) adopted by adherents to a specific paradigm (Tang, 2011). These paradigms are commonly presented along a continuum from objective to subjective reasoning (Bisman, 2010; Chua, 1986; Morgan & Smircich, 1980; Weber, 2004).

Chambers (1982) presents a paradigm as a set of dominant research standards which both guide research efforts and act as a qualifier for whether a field of research can be considered a science. On one hand, positivist researchers take a hypothetico-deductive approach (Andersen & Hepburn, 2020) which adopts an assumption that repeated efforts of measurement will move towards a generalisable model (Bogen, 2020; Brown, 1981). In a postpositivist paradigm, researchers carefully concede the limits of understanding and are less concerned with absolute truth than their positivist predecessors (Tashakkori & Teddlie, 1998). However, the lines between paradigms are somewhat blurry, and this stance has also been associated with critical realism (Outhwaite, 1983). On the other end of the spectrum, reality is presented as a projection of one's individual consciousness which can be termed as the subjective or interpretivist view (Chung & Alagaratnam, 2001). These viewpoints then inform judgements as to the legitimacy of a contribution to knowledge, as well as the methods chosen to interrogate a particular subject of interest. However, marketing also presents a unique meeting point between physical provisioning (Dixon, 2002) and cultural meaning making (McCracken, 1986; Toledano, 2019).

Dixon suggests that the marketing system, through its emphasis on the provision of customer benefits through the availability of goods, services, experiences and ideas:

- *has an immediate impact on household needs and wants, on roles and behaviors,*

and especially on communications;

- *significantly influences cultural beliefs and values, adding to the stock of cultural artifacts; and*

- *transforms the everyday material settings of social life, through product and service innovation, through investments in physical infrastructure and through the creation of wants that in the end may be unsustainable (Layton 2015, p.555)*

Therefore, rather than reviewing marketing thought ‘in a vacuum’, this discussion includes commentary on temporal, cultural, individual, and institutional influences.

5.2 A Brief History of Marketing Thought

The predominant perspective in marketing may, at face value, seem obvious. From its parent disciplines in economic theory and psychology, marketing can be seen as a function or system which focuses on rationality, competition, individuality, compound growth, capitalism, and value exchange. However, despite continued attempts at a general theory (Bartels, 1968; Hunt, 1983; Shaw, 2020), the fundamental ‘laws’ of marketing that some search for, remain elusive.

Marketing thought is in perpetual flux. Most broadly, marketing research (as distinguished from market research) describes and explains the processes of value creation and exchange (Hunt, 2002). In some cases, marketing theory is oriented towards directly influencing commercial or consumer outcomes, making it more akin to the study of marketing success (Hunt, 2002). On closer inspection, the domain of marketing scholarship depends on what you read (see Table 3.2). The foundations of marketing thought become evident as largely implicit, with varying positions and degrees of clarity regarding a) what marketing is and isn’t; b) what the aims of marketing research are or should be; and c) the foundational paradigm(s), or worldview(s), on which it all sits. However, there are some recurring themes and common assumptions that will be discussed in the following account of the field.

Of great relevance here, are the fundamental questions for this field of enquiry. While cosmologists may ask how the universe came to be (Monserrat, 2015), and psychologists at the deepest level may address problems of consciousness (Havlik et al., 2017), the foundational questions of marketing thought seem unclear. There is, however, relative consensus that marketing research is generally concerned with value creation and exchange and carries a zone

of influence that is increasingly extending across various human contexts (Bagozzi, 1974; Carman, 1980; Ferrell & Zey-Ferrell, 1977; Hill & Martin, 2014; Hunt, 1983; Pittz et al., 2020). Though the course of its history, there have been multiple calls for reevaluation of marketing philosophy:

There is, thus, emerging demands for novel lines of critique in the field that go beyond orthodox knowledge, and which can address new social realities that are the result of an increasingly culturally integrated world (Prasad & Holzinger, 2013, p. 1917).

Marketing scholars are cognizant of the imperative for a new and probably radical reformulation of its fundamental philosophy, its operational premises and the heuristics that are used to make marketing decisions. But what are the conceptual underpinnings of such a worldview? How can we construct an orderly set of criteria that can reverse or at least slow down the operational mindset and theorems that have guided marketing's activities for over a half century? (Achrol & Kotler, 2012, p. 45)

Despite the reported need for “a new philosophical orientation, one which is tied to the well-being of the consumer and society over the well-being of marketing management” (Achrol & Kotler, 2012, p. 51), the discourse is more commonly framed around adapting marketing thought to broader contexts, without addressing the core precepts or directly presenting an alternative worldview. Much like *Taoism*, marketing resists a static definition. So much so, that the American Marketing Association reviews and approves their official definition of marketing every three years (American Marketing Association, 2017).

Table 5.1*Definitions of marketing*

Years	Definition of marketing
1935, 1937	Business activities involved in the flow of goods and services from production to consumption
1948, 1960	The performance of business activities that direct the flow of goods and services from producers to consumers
1985	The process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organisational objectives
2004	An organizational function and set of processes for creating, communicating and delivering value to customers and for managing customer relationships in ways that benefit the organisation and stakeholders
2007, 2008, 2013, 2017	Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large

Table adapted from Bagdare (2015, p. 61; American Marketing Association, 2017; Gundlach & Wilkie, 2009; Wilkie & Moore, 2003; Wilkie & Moore, 2007)

What began as a fairly simple exchange between makers and buyers, has evolved into a definitional behemoth. The inclusion of the phrase ‘society at large’ is highly ambiguous, perhaps society is being likened to an escaped convict, or even more absurdly, a single undifferentiated entity which benefits from all forms of marketing exchange.

The AMA also provides a definition of marketing research, as follows.

Marketing research is the function that links the consumer, customer, and public to the marketer through information—information used to identify and define marketing opportunities and problems; generate, refine, and evaluate marketing actions; monitor marketing performance; and improve understanding of marketing as a process.

Marketing research specifies the information required to address these issues, designs the method for collecting information, manages and implements the data collection process, analyzes the results, and communicates the findings and their implications (American Marketing Association, 2017).

Hunt (1978) presents three dichotomies in marketing of micro/macro, profit sector/non-profit sector, and positive/normative. The positive/normative dichotomy is classified by whether the focus of the analysis is primarily descriptive (examining what is) or prescriptive (outlining what ‘should’ be). This is relevant because in the former view, marketing researchers are positioned as an exogenous observer of marketing phenomenon, while in the latter they are endogenous participants who actively shape marketing methods and outcomes. While customer choice, need fulfillment, and the four Ps may be seen as central concepts (Arndt 1979, Hunt 1979) exchange theory, transaction costs, information alternatives, and influence, are also central to marketing thought (Day & Wensley, 1983).

5.2.1 Early Marketing Thought

While the term ‘marketing’ may immediately bring to mind the contemporary commercial world complete with conglomerates, corporates, and technocrats — centralised and organised market trading has been part of human life for centuries (Pantano & Dennis, 2017). Despite a frequently perpetuated myth that the marketing concept emerged in the 1950s-1960s as part of a ‘marketing revolution’, the marketing concept was also present in American industry publications during the 1800s (Jones & Richardson, 2007; Tadajewski & Jones, 2012). For example, an article in the *Scientific American* (1895) titled ‘marketing apples’ shows an almost fully intact representation of what is now referred to as the marketing mix (Figure 5).

Figure 5

*Marketing Apples***Scientific American.****Marketing Apples.**

Some essential points to be considered in the marketing of fruit were given by Mr. George A. Cochrane in a paper read a few weeks ago before a meeting of the Massachusetts Fruit Growers in Worcester. We quote in a condensed form a few paragraphs, which will be found interesting to buyers as well as growers:

For several reasons the barrel is too large a package for apples, which should be marketed in boxes no larger than those used for oranges and lemons. Last fall I advised the trial of such a package, and suggested that each apple be wrapped in paper as oranges and lemons are. Three thousand cases were sent to me for shipment to Europe. Out of fifty growers of apples only three understood what a close selection of fruit meant, and the apples sent by these three growers sold in London at \$2.40 a case, when fruit in a barrel, which held three times as much as one of the cases, brought only \$4. Some growers sent windfalls, in the hope that wrapping them in paper would insure their safe arrival in England. Some sent Snow apples and Russets mixed in the same case. Of course, when barrels are used, new ones, and not second-hand flour barrels, should be used, for, no matter what care is taken to dust and wash them, sufficient flour will remain in the seams or staves of old barrels to rattle out in transportation and dust the fruit.

In packing a barrel, select a fair sample of the contents for the bottom layer. Place the apples, stems down, in the form of a ring, beginning at the outside, and having secured this layer firmly, place the second layer in so as to fit closely in the interstices, then fill the barrel quickly and gently, and when one-third full rock it slightly to settle the apples. Repeat this rocking when the barrel is about three-fourths full, and when it is filled place a padded board on top and rock it while the board is held down firmly. Then place in

cate fruit ought never to be placed in barrels, except for near-by markets, and then only under the most favorable conditions of weather. Were American apples marketed in as sound condition as oranges are, if they were graded as oranges are as to quality and size, if they were wrapped and packed as oranges are, they would be worth three times as much as they now command in Liverpool.

Scientific American (1895, p. 251)

Rather than a revolution in marketing practice, instead, the mid-20th century presents a notable revolution in marketing abstraction. A proliferation of new terms and conceptual models were generated in conjunction with an increase in academic interest (Wilkie & Moore, 2003). While marketing-management places emphasis on shareholder value as the core aim in marketing, historical marketing research points to the influence of the German historical school and the intention towards social welfare paired with a scientific approach to “describe and classify the facts of business” (Jones & Monieson, 1990; Sparling, 1907). The German Historical School “combined the exploratory, descriptive, process orientation of nineteenth century German idealism with a faith in the objectivity of facts and a concern with problem solving” (Jones & Monieson, 1990, p. 110).

In early 1900s America, two foundational schools emerged at the University of Wisconsin and Harvard University Graduate School of Business. While agriculture provided most of the subject matter for research on marketing problems at the University of Wisconsin, retailing and manufacturing were the focus of equivalent courses at Harvard (Jones & Monieson, 1990, p. 108). These early courses at the Harvard Graduate School of Business used both quantitative and qualitative measurement, employed case-based research, and framed the study of marketing as a science with business implementation as a complementary artform. Twenty years on, Edwin Francis Gay retold the story of the school’s founding as a daring and imaginative endeavor “truly there has been a magic at work, a creative imagination embodying in material forms a spiritual force” (Gay, 1926, p.397). This illustrates the relevance of the temporal, geographical, and cultural context of marketing thought as well as how the narrative has shifted through time.

Proponents of the vocational view, such as Borden (1964), continued to frame marketing as an art. “Marketing is still an art, and the marketing manager, as head chef, must creatively marshal all his marketing activities to advance the short and long-term interests of his firm (Borden, 1964 p. 1).” By the late 1960s, advocates for an approach to marketing that emulated the physical sciences critiqued earlier education that emphasized vocational, practice-based research which taught marketing as more akin to art (Tadajewski, 2004).

5.2.2 1970s –2000s Paradigmatic Debates

From 1970 onward, there has been an ongoing debate regarding the philosophy of science and taxonomy of paradigms in marketing and organisational research (Bagozzi, 1977; Bristor, 1985;

Churchill, 1979; Cravens, 1998; Dawson, 1979; Chung & Alagaratnam, 2001; Ferrell & Zey-Ferrell, 1977; Kotler & Zaltman, 1971; Raval et al., 2007; Rod, 2009; Vidali, 1977). The proliferation of paradigms is particularly apparent in research conducted between 1970-1990, in which paradigmatic adversaries argue for one methodological view or approach to marketing over another.

Historically, paradigmatic debates frequently place emphasis on “critiquing” marketing as a science (Arndt, 1985; Jones & Monieson, 1990) or questioning if general theories of marketing are valid, plausible, or even valuable (Bristor, 1985; Shaw, 2020). However, while some uses of paradigms provide a helpful nomenclature for different points of view, others seem like more of a flag-planting exercise in which labelling an idea as a paradigm serves as a significant contribution to knowledge (Table 3.2, Figure 3.1). Through time, marketing scholars seem less concerned with establishing the philosophical layers of their positions and more concerned with coining a paradigm or justifying a particular course of research.

The addition of a pragmatic paradigm to organisational thought (Tashakkori & Teddlie, 1998), contributed to the growth in mixed-method research and greater focus on aligning the choice of method with the question being asked. The pragmatic approach has attracted a contrasting array of interpretations (Legg & Hookway, 2021; Majeed, 2019). In earlier paradigmatic debates in psychology, James (1907) critiques pragmatism as a new name for old ways of thinking. The conflict in philosophy of science is framed as being a ‘battle’ between the ‘tough-minded’ empiricists and the ‘tender-minded’ who prefer *a priori* evidence and appeals to rational thought. The tender-minded are described as idealistic, optimistic, and religious, believing in free will, while the tough-minded are materialist, pessimistic, irreligious, dogmatic, and fatalistic (James, 1907; Legg & Hookway, 2021). By contrast, Hunt (2002) positions the use of paradigms next to calculus as simply another tool in the toolkit (p. 6). Some articles focus exclusively on one layer of paradigm, such as method (Deshpande, 1983) while others go through all three layers (Arndt, 1985; Hirschman, 1986). However, the paradigmatic debate in marketing continues and, in some sense, emulates Orwell’s (1945) political commentary in *Animal Farm*—all paradigms are equal, but some are more equal than others.

Many marketing scholars reportedly place emphasis on adopting a stance of logical empiricism which is often referred to using a catchall of ‘the scientific approach’ (Hunt, 2010; Tadajewski,

2008). This positions marketing phenomenon as quantifiable, predictable, and subject to stable scientific laws or truths which can be identified, measured, and used to make predictive inferences on the outcome of marketing activities. However, with the ‘epistemological turn’ of the 1980s, came a critique that the long-range generalisations of marketing thought are lacking in comparison to the natural sciences which it methodologically often seeks to emulate (Tadajewski, 2004). This shift in how marketing research was deemed as a valuable contribution to knowledge came with, what Lutz (1989) pointed to, as the need to address and understand a broader range of approaches and to integrate naturalistic research which employed *in-situ* research tactics such as ethnography, in favour of solely *a priori* and experimental methods. Still others focus on influencing firm success (Day & Wensley, 1983), shaping buyer behaviour (Carrington et al., 2010; Szmigin & Foxall, 2000), or, more recently, affecting social and environmental change (Kemper & Ballantine, 2020; Kumar & Dhamija, 2017; Pittz et al., 2020).

Overall, a logical-positivist and cognitive science-based view can be seen as the dominant influences on the proliferation of paradigms in marketing (Figure 3.1) and consumer research (Majeed, 2019). While not without exception (see examples based on Buddhist psychology (Mick, 2017; Thich, 2019), mainstream consumer research most frequently draws on a very limited array of the available approaches to psychology as based on client-centred therapy and cognitive behavioural psychology (Table 3.2). In this way, marketing reflects the received Cartesian-dualism of Western-thought (Seigel, 2005) and the subject-object distinction which strengthens a perceptual separation between mind (subject) and body (object). Following the broadening movement, ontology and epistemology are increasingly cast aside in favour of a focus on social, political, and environmental issues. However, *on close reading*, the received philosophical boundaries as outlined above are ever present.

5.2.3 1950s-1990s - The Rise of Consumer-Centricity

In the 1950s-1960s along with an increase in the distance between production and consumption, there was a notable shift toward consumer-centricity (Dholakia et al., 2020). By the 1990s, an expansion in breadth of metaphors in marketing language came about through the introduction of the *Journal of Consumer Research* (Chung & Alagaratnam, 2001) which focuses on consumer behaviour as largely informed by cognitive psychology. This group of marketing researchers employ theories of attitudes, emotions, and information processing as the foundation for the

dominant behavioural paradigm (Achrol & Kotler, 2012). Decision making is predominantly assumed to be a product of thoughts, mind, and cognition. However, this notion has been challenged on the fringes of the domain. Bagozzi (1975b) indicates that “marketers need a model which portrays man [sic] in his entirety and not only in the consumption of goods and services” (p. 310).

There are several cultural myths surrounding the extent of the persuasive power of marketing and the difficulty in attributing sales or social outcomes back to specific marketing interventions (Rotfeld, 2009). Again, these myths cross boundaries of the marketplace and bleed into political arenas through the consideration of propaganda techniques and assessing the power of mass media to influence thoughts and behaviour (Kotler & Zaltman, 1971). More recently, there has been the development of ‘neuromarketing’ which is an offshoot from neuroscience and could be seen as more closely aligned with approaching marketing as more akin to the natural sciences by attempting to answer consumer behaviour questions in an isolated, experimental environment. There are advocates for development of neuromarketing and nanotechnology (Achrol & Kotler, 2012) without overt considerations of the ethical implications of this approach. In marketing practice, and particularly in advertising, there is an emphasis on presenting consumers with a problem before offering a solution (Shaw, 2012). There is also considerable focus on the *effectiveness* of evoking certain emotional states to increase engagement, without overt consideration of second order effects. While there is a reported shift in focus from customer satisfaction to experience (Achrol & Kotler, 2012), however, this appears as more of a change in language than a genuine change in approach (Osborne & Ballantyne, 2012).

5.2.4 1970s-today - The Broadening of Marketing Thought

The most current iteration of the AMA’s definition of marketing is, at least in part, a product of the suggestion that marketing concepts can and should be applied to broader economic and social outcomes. This concept has been present in the literature since as early as 1969 (Ferrell & Zey-Ferrell, 1977; Hirschman, 1986; Kotler, 1972; Kotler & Levy, 1971; Kotler & Zaltman, 1971). This expansion into other domains was led by Phillip Kotler (1971;1972). Perhaps not by coincidence, Kotler and Zaltman’s (1971) paper on planned social change came just three months after the largest anti-war protest in American history, which represented a significant

movement mirrored in popular culture from literature, to film and music during that time (Kaufman, 2009).

The broadening movement put forward that marketers and marketing scholars can and should extend marketing to all organisational contexts (Kotler & Zaltman, 1971). Coinciding with this, the generic concept extended marketing to all human interaction (El-Ansary et al., 2018; Kotler, 1972). However, rather than shifting the foundational values, methods, and theories toward different relational models, the broadening of marketing thought takes existing marketing ideas and techniques and applies them to social, political, or institutional practices (Kotler, 2005).

Notwithstanding the tireless work of a dedicated cadre of researchers in public policy, non-profit, environment and social marketing fields, marketing has not embraced a worldview commensurate to its vanguard role in the social and economic well-being of nations (Achrol & Kotler, 2012, p. 44).

Positioning marketers in a ‘vanguard role’ implies that organisations, business owners, or perhaps their marketing departments alone, have some level of authority as to what social and economic well-being looks like. By contrast, detractors of the broadening movement caution against the potential confusion caused by a too-general concept of marketing.

The consequences of the blurred image of marketing will be confusion in research, teaching and the practice of marketing (Ferrell & Zey-Ferrell, 1977, p. 313).

Closely associated with the broadening movement is the idea of social marketing, defined as

...the design, implementation, and control of programs calculated to influence the acceptability of social ideas and involving considerations of product planning, pricing, communication, distribution, and marketing research. (Kotler & Zaltman, 1971, p. 12)

In critical marketing studies, one concern regarding the broadening of marketing thought is that the broadening movement has done more to support market-oriented reform policies which support existing privatised wealth, while acting in detriment to the public good it claims to serve (Dholakia et al., 2020).

While not necessarily representative of the majority, there are macro-marketing researchers who argue for marketing thought to adopt systems-thinking, complexity science, and nonlinearity (Dixon, 2002; Layton, 2015; Wooliscroft, 2021). This approach considers more contextual questions regarding how markets and marketing came to be in the ways that it is, and how change ripples through and between previously separated domains (Dixon 2002; Layton, 2015). From a micromarketing perspective, Wooliscroft (2021) presents marketing events as non-repeatable and therefore not suited to experimental research. Because “macromarketing is the study of market institutions and the relationships among markets and other social institutions” (Dixon, 2002 p. 88), it is conceivably more suited to a systems-thinking approach than the traditional static-equilibrium model of micromarketing and classical economics (Dixon, 2002). In a marketing system, relationships are both direct and indirect (Layton, 2015). In this way, macromarketing considers marketing as a dynamic concomitant structure alongside the other individual, household, cultural, and institutional systems that make up a society (Dixon, 2002). What’s more, general systems theory holds that all systems have some characteristics in common and those commonalities make up the structure of the universe (Layton, 2015).

5.3 Theories from Other Fields

Given the origins of marketing thought, along with hybridised methods of enquiry, marketing thought includes a great number of ‘borrowed’ concepts. Marketing thought is inherently syncretic. This creates a complex and, at times, baffling internal logic (Table 1.3). The ‘scientific’ approach to marketing can be divided into two streams of marketing thought that are largely based on either economic theory or behavioral psychology. This has significant implications regarding the process of marketing research. A particularly potent example of this is the debates regarding a relationship paradigm for marketing, some researchers conclude that marketing holds an inherent relational and inter-dependent quality (Pelton et al., 1999) while others use relationship to reiterate traditional dyadic models of exchange (Lindgreen, 2001). Thus, multiple research parties with the same starting point can reach very different conclusions.

Due to the adoption of theory without the associated tacit knowledge that can be acquired through experimentation (or industry application), there is risk of applying data analysis techniques without the required knowledge to analyze either the quality of data, or suitability of techniques to answer the questions at hand (Churchill, 1979; LaTour & Miniard, 1983). In the

1970s, this lack of clarity over the distinction between conceptual and experimental, or even applied research, may have contributed to the lament of distance between theory and practice in marketing, previously attributed to a combination of misaligned incentives and competitive secrecy (Vidali, 1977). While these debates occurred over 40 years ago, the core issue has not been resolved, and similar challenges to methodological rigor are still reflected in both quantitative and qualitative marketing research (Crick, 2021). While empirical evidence is gathered in a context-specific setting, the theories that follow are often generalised to a point of distortion —marketing is treated as a predictable, universal method which can be acquired through learning core theories such as the 4P's, segmentation, and positioning (Ardley, 2008).

One prominent example of a 'borrowed' theory widely taught and applied in business studies is the sociologist Abraham Maslow's (1943) work on the theory of human motivation. It reads as a speculation on what *could be* the mechanism for motivation in human activity. In close reading, Maslow (1943) references the lack of generality for the model.

For our chronically and extremely hungry man, Utopia can be defined very simply as a place where there is plenty of food. He tends to think that, if only he is guaranteed food for the rest of his life, he will be perfectly happy and will never want anything more. Life itself tends to be defined in terms of eating. Anything else will be defined as unimportant. Freedom, love, community feeling, respect, philosophy, may all be waved aside as fripperies which are useless since they fail to fill the stomach. Such a man may fairly be said to live by bread alone. It cannot possibly be denied that such things are true but their generality can be denied. (p. 374)

The primacy of physical factors of wellbeing over emotional ones is also put into question, "Who is to say that a lack of love is less important than a lack of vitamins?" (Maslow, 1943, p. 394). Despite the author's reservations, Maslow's hierarchy is cited in over 43,000 articles with more than 12,000 being concerned with marketing topics (Google Scholar, 2/2/2022) Often in passing, Maslow's hierarchy is employed as a priori evidence towards models of decision making for marketing contexts without any great depth as to the reasoning behind the model (Sheth et al., 1991). In at least one case, it is used as the foundational concept, despite concession that the model is "probably largely irrelevant in a developed society" (Achrol & Kotler, 2012, p.

47). In the original paper, Maslow (1943) also speaks to the lack of transferability of rat studies on which much of the early motivational research is based.

Logical empiricism is commonly presented as the dominant philosophy in marketing thought (Arndt, 1985; Jones & Monieson, 1990; Majeed, 2019), which relies on the instrumental man metaphor and places emphasis on purposive decision making (Arndt, 1983). When a paradigm provides an unspoken set of shared beliefs for the research community, this can generate a network of assumptions that remain beyond conscious awareness (Arndt, 1983, 1985; Morgan, 1980). This dominant view may be further bolstered as dissenting voices risk being deemed as irrelevant, unscientific, or unpublishable by ‘intellectual gatekeepers’ (Arndt, 1985; Tadajewski, 2008). Because it is inherently influenced by attitudes, quirks, and idiosyncrasies of a given research community, it is unlikely that there is a single normative model of scientific enquiry (Feyerabend, 1991). In this sense, whether a particular contribution to knowledge is considered legitimate is determined *à la mode* — or at least partially contingent on criteria of the time, place, and social climate in which it was produced.

In cases where underlying philosophical perspectives are addressed, the discussion is rarely centered around contextualising marketing within broader questions of the social sciences, or the pursuit of knowledge in general, and is more often centered around preserving marketing academia (Dawson, 1979; El-Ansary et al., 2018) or conceptualising marketing phenomenon towards the efficient allocation of resources (Jones & Monieson, 1990). There is an apparent tendency to maintain existing beliefs by embedding ideas in complex language and systems of measurement at the cost of greater understanding (Churchill, 1979; Svensson, 2009). This fixation on the operationalizing and itemisation of variables limits findings to a situational record of facts, with limited generalizable value (Achrol et al (1983) as cited in Arndt, 1983).

Tadajewski (2008) posits that the disconnection of scientific activity and politics runs deep in marketing research. Overall, there is a tendency to defend one’s favoured paradigm, which indirectly shifts the focus away from more meaningful/substantive questions. Findings are not solely judged on ‘truth value’, but those paradigmatic preferences play an equal role in determining validity (Tadajewski, 2008). This contributes to a viewpoint of ‘naïve realism’, where the individual’s perspective is assumed correct and evidence to the contrary is met with dismissal (Tadajewski, 2008). In this way, there is a symbolic distancing of the inherently

values-laden process of marketing from broader social and political forces as well as a further removal of the researcher from phenomenon being studied.

Academic marketing is currently dominated by experiments removed from reality, SEM modelling, Hayes moderation/mediation modelling, artificial “intelligence” and automated data analysis, where the model is hidden from the researcher (Wooliscroft, 2021, p.118).

5.4 Development, Evolution, Competition, and Growth

Marketing research also includes theories on competition. One of the prominent concepts is a form of social Darwinism – that only through survival of the fittest can organisations continue to operate (Dawson, 1980). On one hand, the adoption of terms from natural sciences are used as a tool for legitimising theoretical frameworks. For example, the work of Wroe Alderson (often referred to as the father of modern marketing), instigated the shift towards a behavioural model (Shaw et al., 2007). Significantly, his work incorporated ecological terminology alongside a level of religiosity (Beckman & Beckman, 2008). More generally, terms like ‘organism’ are used to describe how marketing environment influence strategy and the idea of ‘organic evolution’ used to describe product management process (Jones & Monieson, 1990). This is particularly meaningful considering the influence of political economic theorists including Adam Smith and Thomas Robert Malthus on Charles Darwin’s evolutionary theory (Kiel & Lusch, 1992).

Development and economic growth have been central to economic thought recent years. The dynamics of industry growth, technology diffusion, and globalization have a dramatic impact on current economic growth of nations, significantly changing the market structure and world trade, and challenging the paradigm of competitive equilibrium and their guiding principles. Two important phases of economic growth theory are characterized by technology and knowledge innovations. The development of computer industry and other high-tech industries today have intensified the market competition and innovation dynamics in the fast-growing countries like the NICs in Asia and China. Increasing efficiency and productivity growth have played a central role in industry growth in the fast-growing countries (Sengupta, 2011, p. 7).

The underlying worldview across the history of marketing thought appears as implicitly materialist (in the sense of the belief that matter creates itself). The discussion in marketing thought overwhelmingly adopts an inherited materialist ontology and focuses more directly on questions of epistemology and methods (Table 1.3), without much direct discussion of the starting point of marketing, the world where marketing takes place, the nature of perception, or the ‘metaphysics’ of marketing. There is an historical spotlight on which methodologies are superior or what constitutes ‘good’ science in social and organisational contexts, perhaps because these are easier questions to answer than ‘what, if any, is the foundational quality or nature of existence?’.

Chapter 6: Exploration the Third: A Dialectic

As systems scientist Anthony Hodgson suggests, we need to rehabilitate the observer as a first step to heal our fragmented world. My point is very pragmatic: The observer's level of awareness and consciousness directly influences the system. It does so because our level of consciousness and awareness directly influences how we think, behave and act in the systems we belong to and participate in. The observer is also an agent, a change-maker that transforms the system. If you see the world as if you are part of it, you are likely to treat it better and that affects how the systems operate (Coll, 2021, p.3).

6.1 Dichotomous Modelling or Dynamic Polarity?

This chapter engages in a dialectic between marketing thought and *Taoist* philosophy, considers what a *Taoism*-based model of marketing thought might entail, and concludes the thesis with key findings and future research agenda. It begins with a consideration of the treatment of pairs of opposites in each system, before discussing the role of the individual or self and considering the contrasting ideals of marketing thought and *Taoist* philosophy.

One premise that appears as foundational across all subdomains of marketing thought is the preference for dichotomous modelling. The buyer/seller dyad is built into marketing theory (Achrol & Kotler, 2012) and while the limitations of dualistic thinking have been addressed in other fields (Cloeke & Johnston, 2005), there is scope to further address this notion in the marketing domain. The marketer/consumer dyad inherently creates a model of enquiry which separates out questions of value creation and delivery from questions of purchase and consumption (Table 2.3). In a sense, research is either focused on the consumer or the marketer, without often addressing inter-dependence between the two. While the *Taoist* notion of yin/yang also represents a system of two opposing elements, they are seen as integrated and arising from the same fundamental source (English & Feng, 1972). Rather than a fixed continuum between 'this' and 'that', opposites are treated as contrasting expressions of the same phenomenon. From a philosophical perspective in contrast to a subjective/objective continuum, in *Taoist* cosmology, all actions are perceived as organic, relational, and dynamic (Sterckx, 2019). As such, those taking a *Taoist* approach would embody a receptive mode of participation that engages with reality, or in this case the marketing reality, on its own terms (Nelson, 2004).

Under heaven all can see beauty as beauty only because there is ugliness.

All can know good as good only because there is evil.

Therefore, having and not having arise together.

Difficult and easy complement each other.

Long and short contrast each other;

High and low rest upon each other;

Voice and sound harmonize each other;

Front and back follow one another.

Therefore, the sage goes about doing nothing, teaching no-talking.

The ten thousand things rise and fall without cease.

Creating, yet not possessing,

Working, yet not taking credit.

Work is done, then forgotten.

Therefore, it lasts forever (English & Feng, 1972, p. 2).

At an ontological level, this framing of opposites sits somewhat outside the single-objective or multiple-subjective reality dyad present in the philosophy of science debates within marketing thought (Table 2.3). Rather than focusing on conceptual truth, *Taoist* philosophy takes a practical and experiential point of view without disregarding the potential of an underlying unification beyond an individual consciousness. What follows from this foundation of neutrality and ‘unknowing’ is a path to knowledge that is less focused on proof and truth-value, and more focused on ease, embodied knowledge, and the rewards of often unconscious, intuitive creative processes (Li, 2012; 2016).

6.2 Self, Society, and the ‘Good Life’

The interaction of consumption and behavioural patterns with self-concept represent some of the core foci of marketing thought (Ahuvia, 2005; Belk, 1988; Gilal et al., 2019; Ladik et al., 2015).

From a consumer-psychology perspective, an individual's self-concept represents the beliefs and attitudes they hold towards themselves as an individual, incorporating how they believe they are perceived by others, as well as the overarching narratives they hold about who they are as an individual (Kimmel, 2013). Over the course of marketing's history, many theories of self have been adopted and developed towards both understanding and influencing consumer decision making (Cialdini, 2007; Gilal et al., 2019; Kimmel, 2013). For example, discrepancies between actual and ideal selves are considered through theories of self-congruence, which imply a directive intention towards personal growth through replacing current identifications with more favorable ones (Fox et al., 2018; Landon, 1974). Desired states are not always limited to happiness, but rather the valence of desire rests on the *nature* of the individual as informed by their individual qualities and life circumstances (Tamir, 2009). What's more, this attainment is often presented as being achieved through external representation of self-concept in the form of consumption. This is particularly apparent in the field of qualitative consumer research (Ahuvia, 2005; Schouten & McAlexander, 1995). By contrast, in a *Taoist* approach, self-development occurs through introspective and restorative practices such as contemplation, meditation, and personal energy practices like *Qi Gong* (Warden et al., 2021).

It is relevant here to consider the origins of the notion of there being a distance between the current self and 'ideal' self, as a driver for human behaviour and, in the marketing context, buyer behaviour. The attainment of an ideal is often presented as self-actualisation (Hamm & Cundiff, 1969) as based on the work of American practitioners including Abraham Maslow (1943) and Carl Rogers (Kimmel, 2013; Rogers, 2012). While psychological theories such as self-congruence have been adopted in the marketing domain, they frequently originate from a therapeutic context and an American cultural setting (Kimmel, 2013; Meadow, 1964).

In the 1960s, Carl Rogers (2012) put forward a theory of self-congruence which posits that humans have an actual self and an ideal self towards which they strive. However, the concept of a transcendent ideal can be traced through the history of philosophy and is firmly rooted in Judeo-Christian theology (Petrov, 2021). Throughout the history of marketing, other theories of self have been adopted. These include Belk's (1988) extended self, self-determination theory (Gilal et al., 2019) and, more recently, self-gifting which perpetuates the concept of being in relationship to self (Clarke & Mortimer, 2013). This focus on the self-concept is further bolstered

by the contemporary prevalence of content sharing platforms along with the Anglo-American cultural emphasis on ‘self’ which reifies performative aspects of self-determination (Fox et al., 2018). This focus on self is intertwined with some implicit philosophical stances on the human condition. Firstly, this framing gives primacy to cognition — perceiving thoughts as the core drive in both identity and decision making (Mick, 2017; Pham, 2013). While much of the historical discussion of paradigms places emphasis on the differences, both the positivist and subjectivist have historically prioritised the ‘reporting’ mind in data collection and analysis. Despite the inherent focus on concepts of ‘self’ the ideas behind marketing often hold a linguistic element of de-personalisation. People in buying contexts are referred to as consumers before generalisations are then made about cognition and decision making in consumer contexts.

Consumer as Purposive, Boundedly or Intentionally Rational and Prospective or Goal Directed. This first perspective has clearly dominated consumer behavior theory; its origins are rooted in the Judeo-Christian tradition and the philosophical underpinnings of American life and culture for which free will and conscious choice are venerated and idealized (Pfeffer 1982). The essence of the perspective is that behavior is internally and goal directed, and that choice occurs according to a consistent set of preferences which maximize value and is thus prospectively rational (Bristor, 1985, p. 301).

This also points toward a significant need to engage with non-Western (and non-clinical) notions of self. The nuance in cultural treatments of self-concept tends to be overlooked in favour of a monocultural conception in which the individual is seen as largely independent and autonomous, and striving towards Judeo-Christian transcendent ideal (Petrov, 2021). This occurs in contrast to the interdependent models which are more prevalent in Asian cultural contexts (Markus & Kitayama, 1991). The relational model mirrors a non-hierarchical familial system rather than considering the individual as a stand-alone unit. However, this is also not to disregard the individual or private-self, which is integrated with a collective or public-self concept (Warden et al., 2021). In a business context, this would see the market framed as an inter-dependent field of unfolding interactions (English & Feng, 1972), rather than a battleground for competing parties to engage in zero-sum games (Reidenbach & Robin, 1991).

Like the cognitive sciences by which it is influenced (Dweck, 2008; Vervaeke, 1997), marketing theory frequently relies on assertions about human nature. In consumer psychology, these

assertions are based on largely received knowledge from cognitive psychology, social psychology and social cognition, and behavioral decision theory (Pham, 2013). However, the ontological questions of human nature or ‘naturalness’ are often implied, rather than directly approached. The language of marketing and its parent disciplines of economics and psychology all carry the assumptions of human separation from and relative dominion over nature — natural elements, flora, and fauna are conceptualised as resources to be extracted, managed, transformed, and distributed (Jones & Monieson, 1990). This treatment extends to human resources in which human activity is abstracted as a resource for input into social structures, rather than being seen as a natural phenomenon (Moore, 2017b). Marketing research consistently, yet often implicitly, purports the human ability to manipulate the environment towards a specific end. For example, business activity is classified as extraction, manufacturing, or distribution (Jones & Monieson, 1990) material resources are treated as expendable (Dawson, 1980), and the primary aims of strategic marketing are to manage resources, compete, and control business outcomes (Schlegelmilch & Winer, 2021).

What’s more, the conceptual distancing between population dynamics and capitalism’s historical patterns of population growth and family structures relies on an underlying human/nature dualism and its corresponding beliefs (Moore, 2017b). While the resource-based view is particularly prevalent in strategic marketing (Day & Wensley, 1983; Jaworski et al., 2000), it is also apparent in the rising number of research papers concerned with sustainable marketing which take a managerial approach to the natural environment by positioning human activity as outside of, or separate from, the natural world (Hurth & Whittlesea, 2017). When environmental sustainability is approached, it is often through a managerial lens. For example, the recommendation that nature costs should be accounted for in each business model (Achrol & Kotler, 2012). This managerial approach, synonymous with planned social change (Kotler & Zaltman, 1971), implies a perpetual state of fixing. The conceptual orientation is toward minimising damage while maintaining economic efficiency, rather than providing net benefit to natural systems. This can be seen in the following interpretation of environmental sustainability for an industrial marketing context.

Building on Varadarajan (2017) we define environmental sustainability as an organisational activity directed at reducing pollution and increasing the efficient use of

energy and other resources to diminish the detrimental effects of firms' activities on the environment. This definition denotes that environmental sustainability manifests in environmental remediation and economic efficiency (Vesal et al., 2021 p.322).

Across political, academic, and now commercial responses to ecological crisis, managerial approaches and solutions have dominated the narrative (Bavington, 2002). However, this conceptual duality between nature/society is increasingly butting against the mounting recognition that this form of separation is not constructive during a significant period of accelerated global environmental change, of which climate change is only one dimension (Moore, 2017b). By contrast, a *Taoist* approach places emphasis on integration and alignment with natural order — essentially, letting be.

Since Heidegger and Lao-Zhuang Daoism claim that the activity of the subject is the problem, it cannot be cured by another—although different—activity of that subject. Environmentalism undermines itself unless it realizes the letting, the non-power and non-usefulness, which truly transforms the human relationship to its context (Nelson, 2004, p. 70).

This represents an almost direct alternative, in that partial solutions to the current crises may be found in doing less. Considering this point, macromarketing researchers with their burgeoning integration of systems thinking (Wooliscroft, 2021) may be well placed to further explore approaches to social change that contrast the dominant approach of management and control. As such, there is scope for macromarketing research to further embed a focus on relationship rather than discrete and static pieces of the marketing system, which mirrors a *Taoist* view of life as an interconnected web of unfolding interactions rather than only discrete and static (Colodzin, 1984).

While marketing discourse has historically ennobled perpetual growth, a *Taoist* approach would place equal emphasis on growth and decay, strengthening and attenuation, or retreat and advance. The full implications of this can only be seen through action, but at a microlevel this could include more flexibility in ways of working, a preference for simplicity in product development, and an approach to marketing messaging that moves away from external need creation/fulfillment and towards personal cultivation, collaboration, and change.

6.3 Transcendent or Embedded Ideals

The desire for perfection, as influenced by the religious impulse, presents another expression of Anglo-American culture in which consumption and entrepreneurial activities are presented as means for attaining transcendent ideals (Toledano, 2019). Alongside this is the need for social relationships and identifications which support one's ability to move through life. To know that you are part of something outside of the 'self' supports meaning in life (Midgley, 1992; Toledano, 2019), whether through altruism (Xi et al., 2016), consumption communities (Schouten & McAlexander, 1995), or vocation (Layton, 2017). Therefore, to consider marketing philosophy is to consider core human drives and the underlying motivations that lead to product development, distribution, and consumption (Ozcaglar-Toulouse et al., 2016) as well as the drive towards self-knowledge and knowledge of the world which is shared by aspirants across scientific, religious, and artistic domains (Capra, 1983; Hoffman, 2019). This drive towards knowledge is also closely tied with questions of faith, regardless of whether that be faith in marketing lore (Ardley, 2008), faith in one's own ability to enact change (Lai, 2009; Srivastava et al., 2010), faith in a religious sense, or faith in the reliability and value of scientific methods (Feyerabend, 1991; Midgley, 1992). By contrast, a *Taoist* view in many ways encourages spiritual and personal attainment not through faith-based transcendence, but rather through a deeper embedding of the individual within, and as an inseparable part of, the ordinary processes of life.

Practice non-action.

Work without doing.

Taste the tasteless.

Magnify the small, increase the few.

Reward bitterness with care.

See simplicity in the complicated.

Achieve greatness in the little things.

In the universe the difficult things are done as if they are easy.

In the universe great acts are made up of small deeds.

The sage does not attempt anything very big,

And thus achieves greatness.

Tao Te Ching, English & Feng (1972, p.63)

6.4 Received Knowledge and Methods of Reasoning

There is some concern that the preference for codified, discrete, and rational knowledge in marketing thought may have come at the expense of tacit knowledge and dynamism (Ardley, 2008) as further expressed by Gummesson (1998) in the following passage.

We need inductive research that allows reality to tell its own and full story, without forcing received theory on it. We need to recognize the role of tacit knowing, knowledge by acquaintance, and validation of results through action. It is a paradox that the mathematics promoted in marketing is the old mathematics, based on mechanical, algebraic, and geometric models from the 14th century and earlier. They have been upgraded over the years, and today with high-speed computers, equations can be solved that took too long to solve before, and data can be processed with more sophistication. The preoccupation with the old mathematics is a paradox because the new mathematics, deriving from the 20th century and much of it from the past few decades, opens up new opportunities. It includes systems theory, chaos theory and dissipative structures, fractal geometry, autopoiesis with self-healing and self-organizing systems, and others. They are all geared to accepting and addressing complexity, dynamics, indeterminism, and ambiguity. They are not looking for simplistic and partial cause-and-effect links, but for patterns and wholes. They dissolve the artificial demarcation line between qualitative and quantitative; in fact, the new mathematics is more qualitative than quantitative. To understand implementation and recommend action, scholars have to accept that the neat traditional marketing model is not the reality (Gummesson, 1998, p. 248).

The preoccupation with quantified knowledge as truth, as pointed to by Gummesson (1998), is largely received theory which holds a one-to-one mapping between each element of a mathematic theory and its physical reality, a notion that has been challenged by an approach that

models the universe as indivisibly whole and ineffable (Kafatos & Nadeau, 2000). While some physicists continue to grapple with the limits of reductionism (Kafatos & Nadeau, 2000), marketing thought appears as still largely focused on the analysis of separate parts – to the extent that each part has representative courses, journals, and research streams. Incorporating an acceptance of the limitations of conceptual reasoning may also allow for a softening of the notion of absolute truth, in that every model is flawed or rather limited by our tools of perception and measurement.

While marketing presents action as causal to a desired state, *Taoism* presents a state of acceptance, non-doing, and flow as incidental to alignment with the flow of life. A non-striving (Nelson, 2004). Considering this contrast, marketing thought could benefit from integrating aspects of a *Taoist* approach to reposition both individual and social endeavours as within the natural environment and in co-creation with a larger perennial pattern of universal laws. This could also coincide with a marketing pedagogy which places greater emphasis on systems views rather than discrete modelling.

The standard dichotomy of discussion is between the material and constructivist views, that either researchers are observers of a material marketing reality or environment, or that the marketing environment is a construction and not real without the observer. What remains to be explored is a view of the separate self as the primary basis for investigation. The inverse would imply that marketers are rather part of the interconnected array of dynamic patterns of change instead of standing separate to it.

The yin and yang of progress in marketing include both the logic, rigor, and objectivity of logical empiricism and the sociopolitical paradigms, and the speculations, visions, and consciousness of the subjective world and liberating paradigms (Arndt, 1985, p.21).

6.5 Implications

Rather than asking whether there is an underlying objective reality or not, a marketer integrating *Taoist* ideals may consider what are the shared qualities of life, what are the differences, and how might these aspects be understood to facilitate harmonious exchange. This requires a reorientation of marketing thought and practice away from compound growth, management, and control and toward a balance of growth and decay, simplicity, and acceptance. Considering this, macromarketing research, with its focus on systemic issues, could incorporate *Taoist* philosophy as an open-systems approach to framing market relationships — considering *Tao* as natural flux and *yin-yang* as complementarity between chaos and order (Coll, 2021).

While the prior discussion focuses predominantly on wider implications, at the microlevel, *Taoist*-based marketing would be less prescriptive and more improvisational. One implication is that is not one-size-fits all, but a reframing of the practice of marketing to being based on the time, place, and circumstance in which it takes place. Akin to entrepreneurship with effectual reasoning (Sarasvathy, 2001), marketing decisions can be based less on projective models and more on decision making with the currently available information and resourcing. At a micro level, these ideals may be more readily applicable to small business environments, master craftsmanship, physical service providers, or even smaller online businesses rather than large corporations. On a practical level, this approach will organize the marketing environment, aims, and process to nourish the individual as well as the organisation, making it particularly relevant to the informal sector, gig-economy, or cottage-entrepreneurship. A middle-path may be available in doing less – and perhaps paradoxically to the traditional naturalist debate, could involve more efficient use of marketing automation, while marketers reorient around what is natural to them through more role specificity and dynamism. As influenced by Sarasvathy's (2001) principles of effectual reasoning in entrepreneurship, principles of *Taoist*-influenced could include:

1. *Tao Principle*: Aligning with natural order leads to generous and generative action without need for moral justification. Focus on business models, productions and communications that are conducive to the flourishing of the individuals involved (buyers and sellers) as well as natural order.

2. *Wu-wei Principle*: Self-mastery is achieved through intentional, careful repetition. Marketing supports life, not the other way around. Embrace trial and error.
3. *Cook Cheng Principle*: Do less, do it well, keep your eyes on what you are doing, and work slowly.
4. *Moon Principle*: A finger pointing at the moon, is not the moon. All models are incomplete, but some can be helpful in communicating insight. Knowledge is infinite, a lifetime is finite. To pursue the infinite with the finite is madness. There are possible outcomes of a course of action that cannot be seen at the time of decision.
5. *Yin-yang Principle*: Internal cultivation precedes generative action. Relaxing and creating safety in the body and mind lead to clarity and benefic decision making. Mastery in business can incorporate contemplation, meditation, and personal energy practices as well as action and promotion. Connect with seasonality – resources of individuals and the physical environment follow natural ebbs and flows that can be leaned into rather than resisted.

6.6 Further Explorations and Research

While the existing narrative research is partially focused on the potential for ethical practices, case studies have focused on more traditional Western performance measures such as profit and time to market (Li et al., 2011; Subramanian et al., 2019). Despite the *Taoist* sentiment of living in harmony with nature (Capra, 1983; Durlabhji, 2004; English & Feng, 1972; Kirkland, 2004; Kohn & LaFargue, 1998; Luo & Zheng, 2016; Sui Pheng, 2003; Zu, 2019), the extant literature on the application of *Taoist* philosophy in marketing is predominantly anthropocentric and appears to hold limited practical or theoretical concern with stewardship for the natural world. While there are some notable exceptions (Su, 2019; Sui Pheng, 2003; Wang & Juslin, 2009), this presents considerable room for further research that directs the wisdom of *Taoist* concepts towards a more inter-dependent approach to marketing. Furthermore, as macromarketing research continues to embrace more of a systems view, there may be further potential in applying *Taoist* ideas to studies of the individual in conjunction with the greater whole.

This thesis also presents an invitation to consider whether the health or dysfunction of the marketing system is mirrored in the health or disfunction of the individual – consumer, marketer, company, or institution. The psychological models of behaviour adapted in marketing thought

trace back to a psycho-therapeutic setting in which homeostasis is already disrupted. While this may serve certain purposes such as alerting people to scarcity to encourage purchase, or even uniting individuals towards a particular cause, this ultimately perpetuates a state of dysregulation on both an individual and systemic level. As such, while existing approaches to marketing as a psychosocial domain may be effective at shaping changes, there is room to consider models that are founded on communication with already healthy ‘actualised’ individuals. Beyond the concepts addressed in extant literature, there are other concepts that are less exhaustively addressed that could be of value for future research such as *he xie* (harmony) (Li et al., 2011), *te* (virtue) (Chang, 1976; Lai, 2008) and *da tong* (cultivation of three treasures) (Zu, 2019). Where *Tao* and *yin-yang* address some of the ontological aspects of *Taoism*, these lesser-known concepts may provide further insight into potential applications of *Taoist* philosophy in marketing. As a large portion of the existing research uses a narrative methodology, there is also an identified gap for studies that employ different methods to build on existing findings in commercial settings. One specific area of research where opportunities exist is the informal sector which is perhaps more consistent with the *Taoist* sentiment in terms of branding, communicating, and delivering value through personal and relational networking (Darbi et al., 2018).

While this thesis has explored the three core texts in conjunction, the level of analysis has been predominantly taken a philosophical approach as a means to open the discussion and range of viewpoints in marketing thought. As such, this thesis presents firstly, that there are significant assumptions and philosophical positions in current marketing thought that both close and open the possibilities of engaging with non-Western philosophical approaches such as *Taoism*, and secondly that perennial, intuitive philosophies such as *Taoism* are both relevant and potentially generative for marketing theory and practice, particularly in the application to self-development and to fields, such as macromarketing, that try to engender more holistic perspectives.

6.5 Final Word

The relevance of *Taoist* philosophy to marketing thought may be found in its clear representation of complex phenomenon, as well as the emphasis on being closer to ‘what is’. *Taoism* both allows for a level of ambiguity and provides a simple allegory for complex processes, which is well-suited to the syncretic and increasingly dynamic field of marketing thought. As such,

Taoism could play a significant role in a gradual movement from the current guiding principles of management (yang) and control (yang) to a harmony between a creative or productive (yang) and receptive (yin) approach. From a *Taoist* or processual point of view, truth is also evolving. This more fluid mode of understanding could allow for greater breadth of research methods, business models, and forms of value exchange in marketing thought. As such, another potential contribution of *Taoist* philosophy to marketing thought is a pedagogy that embraces ambiguity to allow for respectful disagreement and dissention.

Through real and and/or perceived pressures of the contemporary marketing environment, there is a tendency to rush work, whether in a problem solving, product development, or research context. However, through this analysis, the value of depth in inquiry has become apparent, both in engaging with extant material and formulating research questions. Where the status quo leans towards a goal of controlling outcomes through a means of convincing others, this exploration serves as an invitation to imagine what scholarship might look like if founded on an epistemology of understanding process through a means of clear perception in the present and a move towards marketing practices that are more acceptance based as opposed to control based. By considering *Taoist* philosophy as founded on a fundamental wholeness and harmony in the unfoldment of the web of life on both a micro and macro scale, the importance, value, or quality, of humans and society comes forth by virtue of belonging to and being part of nature, as opposed to separate and above it. Concurrent with this, *Taoist* philosophy places emphasis on dynamism between self and the collective through *nei yeh* (inward-training) – an inward out approach to change. This might coincide with realigning practice with a more imaginative approach or creative principle, which is not necessarily at odds with empirical and logical reasoning, but rather complimentary (Coll, 2021).

Beyond the labelling, dichotomies, goals, and intentions that enable the ordering and completion of marketing tasks and discourse alike, the frontiers of the marketing discipline may approach a level of understanding that variability is the key feature of a shared underlying world — as seen from a multitude of perspectives. Marketing towards social change would be less based on prediction and control, with more emphasis on acceptance and a balance between growth and decay or expansion and contraction. This would need to coincide with a reconnection to the understanding that models are abstractions and imperfect maps of the marketing reality. A

Taoism-informed approach may employ a level of acknowledgement of the natural drive towards dynamic equilibrium – suggesting that the effort to control, which perpetuates hyper-complexity and confusion, is ultimately a limitation on the effectiveness of marketing thought in contributing to meaningful, healthy, and enjoyable modes of being.

7. References

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