



Bringing institutional theory to marketing: Taking stock and future research directions

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ABSTRACT

This Special Issue's aim is to take stock of the existing research in marketing that refers to institutional theory and provide insights on how extending dialogue can further enrich marketing research as well as provide new insights for institutional theory. Reviewing the existing literature and the published articles in this Special Issue allows to isolate limitations and to point to four directions for future research.

1. Introduction

Marketing is increasingly engaging with institutional theory (e.g. Dolbec & Fischer, 2015; Humphreys, 2010a; Scaraboto & Fischer, 2012; Vargo & Lusch, 2016; Yang, Su, & Fam, 2012), just as institutional theory has a growing interest for aspects of marketing such as consumer behavior and its impact on institutional processes (Ansari & Phillips, 2011). In this context, the starting point of this Special Issue was to further explore the macro dynamics of market emergence and development, pointing to the establishment of institutional conditions that render consumer practices possible. To do so, we invited theoretical and empirical contributions exploring the emergence, maintenance and disruption of consumption practices and work that acknowledges the variety of roles that actors can play in such institutional dynamics. More broadly, our intention was to contribute to the development of stronger dialogue between research in marketing and institutional theory.

The papers in this Special Issue combine marketing and institutional theory in ways we often did not expect, opening new directions to further bridge these two areas of research. In particular, while we expected most papers to relate to “macro marketing”, examining institutional processes at the industry or field level, most papers focus on the individual level, providing new and rich insights regarding how consumers engage with institutional demands and eventually manage to adapt, or change them. These contributions demonstrate how marketing can therefore contribute to institutional theory by helping to understand how individuals, specifically consumers, perceive, experience and engage with institutions (Hallett & Ventresca, 2006).

The remainder of this introduction proceeds as follows. First, we develop a synthesis of the current conversations between institutional theory and marketing, setting up the context of this Special Issue. Second, we discuss the current integration of institutional theory in marketing and the integration of marketing issues into institutional theory, and detail how the papers of the present Special Issue contribute to those conversations. Third, while the five Special Issue papers help feed the conversations between institutional theory and marketing, they also highlight limitations, thus opening up new avenues for future research.

2. Current conversations between institutional theory and marketing

2.1. Marketing in institutional theory

Institutional theory initially paid limited attention to marketing, as its focus was on how regulated organizations engaged with the related institutional pressures (DiMaggio, 1988; Meyer & Rowan, 1977; Scott, 1987; Tolbert & Zucker, 1983) as well as how fields develop a “collective rationality” (DiMaggio & Powell, 1983). Early empirical work investigated settings such as schools (Meyer & Rowan, 1977), public services (Tolbert & Zucker, 1983), hospitals (Scott, Ruef, Mendel, & Caronna, 2000) or public funded art councils (DiMaggio, 1983). Overall new institutionalism in the early years paid much greater attention to inter organizational relations, prominently how organizations were influenced by, and interact with, institutional pressures and their institutional environment, rather than to markets and consumers. This

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<https://doi.org/10.1016/j.jbusres.2019.06.042>

focus built on a long institutional tradition (e.g. Gouldner, 1954; Selznick, 1949) that departs from market-based explanation of organizations' behavior to account for the role of other factors such as institutionalized routines, powerful stakeholders and cultural aspects.

Extending institutional analysis to encompass market-based factor has been gradual and became important in the 2000s as authors used institutional theory to examine how markets emerged and were structured. This extension was concomitant with a stronger emphasis on agency in institutional theory, an aspect that had so far received little attention. In particular, research attended to those actors who intervened to shape markets or provoke institutional change such as 'institutional entrepreneurs', defined as those actors who contribute to changing institutions despite pressures toward stasis (Battilana, Leca, & Boxenbaum, 2009; DiMaggio, 1988). This renewed perspective focused broadly on the 'supply side' of markets, examining mostly how committed, often powerful, skilled and resourceful organizations more likely to structure markets and shape institutions such as firms (Garud, Jain, & Kumaraswamy, 2002; Kitchener & Leca, 2009), intermediaries (Déjean, Gond, & Leca, 2004), consecration authorities (Anand & Watson, 2004; Jones, Maoret, Massa, & Svejenova, 2012) or activists (de Bakker, de Hond, King, & Weber, 2013; Rao, 2009).

While institutional entrepreneurs were presented as active producers of institutional change, consumers were considered as relatively passive targets of those entrepreneurs' activities. They were considered an important audience to convince, as they could oppose institutional change. This implied that actors willing to introduce change have to consider consumers in order to obtain normative support, or legitimacy. As a central notion of institutional analysis, legitimacy refers to "generalized perception or assumption that the actions of an entity are desirable, proper or appropriate within some socially constructed system of norms, values, beliefs and definitions" (Suchman, 1995, p. 574). Research suggests that consumers' views of legitimacy can play an important role in the success of a market. One of the most vivid illustration of this dynamic is the work by Hargadon and Douglas (2001) on Thomas Edison's early choices in designing the new electrical lighting system that aimed at replacing the gas lighting system. As customers were accustomed to the gas lighting system and as they developed taken for granted habits and expectations about the design and the way of using a lighting system, Edison designed his electric light system in order to espouse them and gain customer cognitive acceptance. For instance, he kept the same meter for gas and buried underground the electric wires. From technical point of view these two choices were suboptimal for the electric lighting system. But by so doing, Edison succeeded in gaining legitimacy for his system.

Institutional theory also insisted on the need for actors willing to institutionalize new practices to build on the existing consumers' habits rather than disrupt them. Munir and Phillips (2005) study of the birth of the mass photography market in the United States illustrates this point. They examine the success of Kodak in building the new market, revealing that its success stemmed from the strategy of embedding the practice of photography in the institutionalized practices of holidays and sharing memories with others. Kodak worked at anchoring its product in the institutionalized symbols through extensive use of those cultural codes in their ads and by encouraging customers to take their camera for vacations.

Research also considered how consumers could be educated. Through an historical analysis of the efforts to legitimize the emerging automobile market and demonstrate its technical superiority despite the absence of paved roads and regulatory hurdles supported by incumbent owners of horse-and-buggy companies, Rao (1994) show, how entrepreneurs initiated "certification contests" to showcase the speed and reliability of cars and educate consumers about the safety of automobiles.

Interest for consumers as active in institutional processes developed as researchers grew skeptical of the power of individual action for shaping institutions and markets. The representation of institutional

entrepreneurs as hypermuscular actors able to envision wide change and implement it alone, while other actors, such as consumers, were depicted as "cultural dopes" has been increasingly criticized as simplistic (e.g. Delmestri, 2006; Lawrence, Suddaby, & Leca, 2009; Meyer, 2006). This led to efforts to depart from focusing on institutional entrepreneurship and pay attention to more diffuse forms of 'institutional work' – i.e. purposive and effortful activities aiming at shaping institutions (Lawrence & Suddaby, 2006), potentially considering consumers as more active in institutional processes.

Research developed this more active approach of consumers along two dimensions. The first is to account for the active engagement of consumers in social movements demanding change. While initially uncoordinated and powerless actors, consumers can gain power to fight for institutional change through coordination (Hensmans, 2003; King & Pearce, 2010; Rao, 2009). Consumers can then resort to powerful strategies such as boycott to obtain such changes. Khan, Munir, and Willmott (2007) for instance suggest that boycott by Western consumers was instrumental in the success of the campaign to stop the use of child labor in the production of soccer balls in the Siakhot district in Pakistan. Powerful consumers can also join forces with allies to promote an institutional change that support their views and interests (Delacour & Leca, 2017).

The second dimension has been developed by examining the role of users in actively influencing institutional processes. Studying the success of the sponsoring of the technology Java by Sun Microsystems, Garud et al. (2002) show the important role that the community of developers/users of Java played in shaping and constraining Sun strategies. In a rare study explicitly focusing on the role of consumers, Ansari and Phillips (2011) account for the microlevel everyday practices of consumers and show how they collectively create and diffuse new practices and illustrate organizations can leverage innovative consumers groups to improve products. In this way, institutional researchers converge with those authors who insisted on the role of lead users and consumers' communities (Von Hippel, 2005; Von Hippel & Krogh, 2003) in influencing innovation processes. Hence, even though institutional analysis has identified consumers as a crucial stakeholder, it tends to draw from management more than marketing to explore the direct or indirect role of consumers in institutional processes. On the other hand, institutional theory had been introduced in marketing along the main problematic of this domain.

2.2. Institutional theory in marketing

Since its introduction into the marketing field in the late 1990s and early 2000s, a growing body of research has adopted an institutional perspective driven by theoretical papers calling for greater cross fertilization between the disciplines (i.e. Chaney & Ben Slimane, 2014; Yang & Su, 2014). The central contribution of institutional theory to marketing is that it goes beyond the firm-consumer dyad by taking into account all actors able to influence markets and consumption, from competitors to critics and from retailers to media. According to institutional theory, consumption thus cannot be regarded as a totally exogenous variable that is dissociated from the extra-individual institutional conditions within which market actors evolve (Chaney & Ben Slimane, 2014). A retrospective look at these works allows us to identify three areas of study (Table 1).

The first area adopts the firm as the level of analysis and looks at how companies seek compliance from their, often changing, institutional environment. Indeed, the marketing literature has predominantly used an efficiency-based task environment perspective and largely overlooked the institutional environment. To cope with this limitation, the literature has mobilized institutional theory to study the type of social pressures stemming from the environment (Grewal & Dharwadkar, 2002; Kirca et al., 2011), the way companies respond to these pressures (Arnold et al., 2001; Martin et al., 2011) and how firms are generally seeking legitimacy with consumers and other stakeholders

Table 1
An overview of marketing papers using institutional theory.

Institutional orientation	Level of analysis	Main focus	Illustrative papers
Conformity of firms toward the institutional environment	Firm/brand	Institutional pressures coming from the environment Legitimacy seeking	Arnold, Kozinets, and Handelman (2001); Grewal and Dharwadkar (2002); Bianchi and Arnold (2004); Auh and Menguc (2009); Hillebrand, Nijholt, and Nijssen (2011); Kirca, Bearden, and Roth (2011); Martin, Johnson, and French (2011); Yang et al. (2012); Chaney, Carrillat, and Zouari (2019) Handelman and Arnold (1999); Kates (2004); Chaney, Lunardo, and Bressolles (2016)
Role of institutions in services	Service system	Institutions as the coordinating link	Edvardsson, Kleinaltenkamp, Tronvoll, McHugh, and Windahl (2014); Vargo, Wieland, and Akaka (2015); Vargo and Lusch (2016); Wieland, Koskela-Huotari, and Vargo (2016)
Market evolution as a social process	Market	Position of firms within the market Role of consumers in changing markets Market creation and development	Palmer, Simmons, Robinson, and Fearnle (2015); Michel, Saucède, Pardo, and Fenneteau (2019) Scaraboto and Fischer (2012); Dolbec and Fischer (2015); Kjeldgaard, Askegaard, Rasmussen, and Østergaard (2017) Humphreys (2010a); Humphreys (2010b); Humphreys and Latour (2013); Ertimur and Coskuner-Balli (2015); Baker, Storbacka, and Brodie (2019)

by adapting to institutional pressures (Handelman & Arnold, 1999; Kates, 2004). The first area of study is not directly centered on consumers. Indeed, the perspective adopted here is to study how companies adapt themselves to the institutional conditions of the environment at first to serve their customers in the best conditions in a second time. While institutional pressures are powerful drivers of the adaptation of specific marketing practices, Hillebrand et al. (2011), taking the example of CRM, demonstrate that the effectiveness of marketing practices decreases when firms are motivated to adopt such practices under the influence of institutional pressures.

The second area deals with the role of institutions in the service system. Assuming that the Service-dominant logic has overlooked coordination processes in the cocreation of value through markets, Vargo and Lusch (2016) introduce a consideration of institutional arrangements in service ecosystems. Previous research has emphasized the key role of institutions in unifying diverging logics within the service ecosystem (Edvardsson et al., 2014). Taking the example of innovation, Vargo et al. (2015) argue that institutional theory “broadens the scope of innovation beyond firm-centered production activities and collaboration networks, and emphasizes the social practices and processes that drive value creation and, more specifically, innovation — the combinatorial evolution of new, useful knowledge” (p. 63). Within services, the creation of value is thus not limited to producers and consumers. Rather, all social actors enact value co-creation practices and shape these practices by reproducing the institutions that guide their (re)enactment (Wieland et al., 2016).

Finally, the third area of research takes a macro perspective by considering the emergence and evolution of markets as a social process. Research has shown here the importance of brands' institutional work to preserve their position within the market, or even to change the rules of the game (Michel et al., 2019). In their study of the institutional work of Retail Co in an industrial workshop setting, Palmer et al. (2015) document for instance how Retail Co maintained its social position within its field by adopting a dominant rhetoric and by reinforcing rules of engagement. Other studies have focused on the ability of consumers to change markets by assuming the role of institutional entrepreneurs (Scaraboto & Fischer, 2012), able to introduced new institutional logics (Dolbec & Fischer, 2015; Kjeldgaard et al., 2017). For instance, Scaraboto and Fischer (2012) show how “Fatshionistas” (i.e., fashion lovers who wear plus-sized garments) were mobilized to contest the norm of thinness in the field of fashion and introduce new market logics in order to expand choice. Finally, some work has focused more broadly on how markets are created and developed through the participation of several market players such as businesses, consumers, government, and the media, (Ertimur & Coskuner-Balli, 2015; Humphreys, 2010a; Humphreys, 2010b). Investigating markets such the Yoga industry (Ertimur & Coskuner-Balli, 2015) or the gambling industry

(Humphreys, 2010a), these studies consider the evolution of markets as a complex process of co-construction. The papers published in this Special Issue both contribute to these works and contribute to foster the integration between institutional theory and marketing.

3. How the papers in the Special Issue contribute and extend current conversations

This Special Issue builds on these conversations. We have thus solicited articles that not only make progress in nurturing these conversations, but also push the boundaries of both marketing and institutional theory. More specifically, Clauzel, Delacour and Liarte (2019) study the influence of consecration authorities like the Michelin guide on consumer judgements. In doing so, their work informs us about some of the effects of top down taste systems, but also cautions against over-reading the influence of institutional structures by finding null and lagged effects of expert judgment. The authors make opportune use of online reviews to study the impact of a loss in elite status, which enables them to examine the relationship between elite and consumer opinion. The archival nature of the data allows them to further refine an understanding of consumer reactions to this loss of status over time, judging short term and long term effects of a loss in Michelin stars. Through correspondence analysis, they show that although overall consumer evaluation does not decline, it does introduce a shift in consumer associations. Utilizing both quantitative and qualitative content analysis, they find that the loss of a Michelin star both introduces new criteria and changes the relationship between existing criteria for rating restaurants. While previous authors have argued that critical status systems are key to market driving success (Humphreys & Carpenter, 2018; Rao, Monin, & Durand, 2003), this work illustrates that consumers can be reactant, not simply submissive to expert judgment.

Hartman and Coslor (2019) explore how rhetorical strategies used in marketing articulate tensions between institutional logics. Specifically, they examine the mixing of market and healthcare institutions in an investigation of communication strategies pertaining to human egg donation. Studying advertisements seeking donors, the authors show how intermediaries craft rhetorical strategies that navigate the tensions inherent in an intersection between gift and market logics, supported by two strong institutions. Rhetoric includes a mix of emotional and rational appeals that align with aspects of each logic. While previous work in marketing has stressed the side-by-side existence of multiple logics (Ertimur & Coskuner-Balli, 2015), it has not directly explored how firms explicitly address tensions between them. We also learn more about the work of middlemen, who are often tasked with navigating institutional complexity between stakeholders.

Go Jefferies, Bishop and Hibbert (2019) then turn to consumers,

studying how they use boundary work to deal with multiple and often conflicting institutional arrangements in healthcare service systems. Based on a qualitative study with 19 people with heart disease and registered to use telehealth for remote monitoring of their condition, they start by documenting that healthcare is characterized by two different institutional arrangements: on one hand the healthcare service system dominated by technological and bureaucratic dimensions and on the other hand customers' life system that includes family and community influences. To cope with these two conflicting institutional arrangements, the authors demonstrate that patients use boundary work at the individual level. In other words, patients adapt themselves to the service conditions to make the process smoother, thus reinforcing provider-customer relationships. More precisely, three types of adaptations are identified: a functional adaptation related to the way patients use the telehealth equipment to monitor and report vital signs, a relational adaptation related to the interactions with staff within the healthcare system, and a translational adaptation related to patients' attempts to mix the healthcare service system with their life system. The article expands the literature on services and institutional theory by offering new insights about customers' ability to navigate multiple institutional arrangements in order to co-create value for the whole ecosystem.

While previous research has documented actors' institutional work to make markets evolve, it has mainly focused on powerful actors who have de facto resources. At the opposite, Ghaffari, Jafari and Sandikci (2019) propose an article in which they study how actors with limited power and/or resources can transform markets. The research investigates the dynamics of the Iranian female fashion clothing market which is characterized by the constraining role of the state in defining what is acceptable and how the market should be organized. In such a context, the data collected by the authors (in-depth interviews and netnographic and archival data) indicate that market players, including consumers, designers, retailers, and social activists, conduct three types of institutional work. First, they engage in ambidextrous practices to meet style expectations without opposing the established order. Second, market actors create networks to gain legitimacy and recruit new members. However, because of the restrictions in place, networks remain limited to close trusted people. Third, actor collectively tries to unsettle rules through an anonymous critic of the dominant discourse. Overall, this article adds to the literature by showing that these everyday practices of resistance can be considered as a form of unintentional institutional work and by depicting how subtle and less organized the institutional work conducted by powerless actors can be.

Zanette and Scaraboto (2019) investigates how the materiality of consumption objects trigger consumers' identity conflict. The authors bridge the micro and the macro levels by assuming that consumption objects (acting at the micro level of consumer behaviors) carry institutional logics (acting at the macro level of the society). As "a set of material practices and symbolic constructions which constitutes the organizing principles of institutions and that are available to individuals and organization to elaborate" (Friedland & Alford, 1991, p 248), institutional logics are one of the most vivid illustration of the macro anchoring of NIT. Zanette and Scaraboto assume that the consumption object embody institutional logics that often convey contradictory meaning and values. Those contradictions in logics and in institutional prescriptions trigger identity conflict since the identity of individuals is also prescribed by institutions at the macro level (Leung, Zietsma, & Peredo, 2014). Building on insights derived from a netnographic study of the use of the shapewear by women, the authors show that the mix of nylon and spandex in the manufacturing of modern shapewear entail this consumer object to carry two contradictory logics: constrictive femininity and flexible feminism. Women daily experience with the shapewear show three kinds of identity conflict: discomfort, discredibility and dissociation that portray how women live with contradictory prescriptions of filling socially defined standard of beauty and femininity at one hand and feminist

empowerment that push them to reject those prescribed standards, on the other hand. This work advances knowledge on the interaction of institutions and marketing at different levels. First, it bridges micro and macro explanations of consumption behaviors through highlighting the capacity of consumption objects to carry institutional logics. Second, it offers new insights to consider the body as a place where institutional contradiction manifest.

4. Directions for further research

Our review of the existing research and the articles of this Special Issue show the ongoing engagement between institutional theory and marketing but also illustrate the limits of such engagement that suggest gaps for future research. We focus on four limitations.

A first limitation is to better understand which consumers are more likely to originate institutional changes (Dolbec & Fischer, 2015; Kjeldgaard et al., 2017; Scaraboto & Fischer, 2012) and what sort of institutional change they are likely to demand. Powerful and resourceful consumers seem obvious candidates to shape institutions (e.g. Battilana et al., 2009; Delacour & Leca, 2017; Dorado, 2005). Yet, we still know relatively little about how less resourceful consumers successfully engage in such activities. Research points to the role of user generated content (Ansari & Munir, 2010) and bottom up processes (Ghaffari et al., 2019; Zanette & Scaraboto, 2019). However, processes of co-creation between consumers and firms through crowdfunding, crowdsourcing and open communities have not yet been examined. While those new practices redefine both the relations between consumers and companies, the ways this impacts institutional processes remains to be explored. Better understanding which consumers are more likely to demand institutional change might also help to better understand what sort of change they demand. Existing research (e.g. Scaraboto & Fischer, 2012; Weijo, Martin, & Arnould, 2018) suggests that consumers can demand a vast variety of changes at different levels (local, national, industry) and amplitude (adaptation of institutionalized practices or radical change). It does not yet examine the relationship between the sort of consumers and the change demanded.

Related to this first limitation, a second one regards our understanding of the specificities of consumers' activities to obtain institutional change. Research has identified consumer movements as a specific kind of social movement (Weijo et al., 2018) that refers to intentional collective efforts by individuals to transform elements of the consumer society (Kozinets & Handelman, 2004). Research points to bottom up processes (Ghaffari et al., 2019) and boycott (Khan et al., 2007) as possible forms of action taken by consumers. Yet, little is known about the specific repertoires of tactics used by consumers to obtain institutional change. While there is a large consensus in both institutional theory and marketing that consumers are crucial stakeholders in processes of institutional change, how consumers themselves originate and conduct such processes remains unspecified. As consumer movements and pressures become increasingly important, influencing not only companies, but also regulators and governments, imposing changes in the norms regulating industries as well as imposing standards and labels needs to be better understood by both institutional theory and marketing.

Nevertheless, the need to better understand how consumers shape institutions should not lead researchers to ignore the influence of institutions and institutional logics on consumers and other actors and to eventually consider them as "disembedded" from institutional pressures. What is at stake here is to better understand the impact of different institutional pressures and the ways that actors engage with them when they are unwilling to change them. Papers in the present issue provide a diversity of directions to address those topics. Regarding consumers, Clauzel et al. (2019) provide, for instance, an interesting direction by exploring the capacity of consumers to abstract from authoritative opinion and develop their own views. Go Jefferies et al. (2019) document how consumers adapt themselves to conflicting

institutional arrangements. From a CCT perspective, future research could go further in articulating the institutional conditions in which consumers exist help them to achieve personal goals (Arnould & Thompson, 2005). Adopting a different perspective, Hartman and Coslor (2019) provide insights about how companies combine multiple institutional logics to legitimize their claims. All together, these articles provide directions to further examine how embedded actors – either companies or consumers – interact with their institutional environment.

Finally, a fourth limitation relates to the aspects that are examined by research investigating institutional processes. Research in this domain has long been dominated by discourse analysis. Only more recently opened to other aspects such as space (Lawrence & Dover, 2015), materiality (De Vaujany, Adrot, Boxenbaum, & Leca, 2019; Huff, Humphreys, & Wilner, 2019; Jones, Meyer, Jancsary, & Höllerer, 2017) or visual representations (Meyer, Höllerer, Jancsary, & Van Leeuwen, 2013), providing opportunities to explore institutional processes as multi-modal processes. Yet, the bodily aspect of those processes remains a largely unexplored dimension. Zanette and Scaraboto (2019) contribute to integrate this dimension, exploring how artefacts embodying institutional logics can constrain the bodies and postures of individuals and eventually trigger identity issues. More broadly, this study also suggests that examining how consumers engage with and experience institutional constraints can provide unique perspectives on the bodily aspect of institutional processes.

5. Conclusion

The purpose of this Special Issue was to review marketing engagement with institutional theory. The five articles in this Special Issue fit not only into the current conversations between marketing and institutional theory, but also extend them. The limitations identified in the articles also yields additional gaps for future research. To fill them, we encourage scholars to continue dialoguing about how marketing and institutional theory can enrich each other.

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