



Addressing grand challenges through the bottom-up marketing approach: Lessons from subsistence marketplaces and marketplace literacy

Madhu Viswanathan¹ · Arun Sreekumar² · Srinivas Sridharan³ · Gaurav R. Sinha⁴

Accepted: 15 March 2024
© The Author(s) 2024

Abstract

We present a bottom-up marketing approach as a pathway to addressing the grand challenge of poverty and inequality for the marketing discipline. We derive this approach from the research stream on radically different contexts of subsistence marketplaces. Research on subsistence marketplaces has typically explored micro-level phenomena but also traversed upward and explained aggregate phenomena at higher levels. We present a conceptual framework to encapsulate general and granular elements of the bottom-up marketing approach. Study 1 demonstrates general elements of the framework through a retrospective examination of the global diffusion of a marketplace literacy program. Study 2 demonstrates the more granular elements of the framework through a qualitative analysis of five case studies of social enterprise start-ups. Though presenting a complementary counter-perspective to conventional thinking, we embed the process of interweaving the bottom-up with the macro level to present an actionable approach. We conclude with insights for marketing research and practice.

Keywords Subsistence marketplaces · Marketplace literacy · Bottom-up marketing approach

Globally, more than two billion people live in subsistence marketplaces (Viswanathan & Rosa, 2007) and face grave challenges of low incomes and personal resources, coupled with inadequate access to basic goods and services such

as food, water, housing, education, financial services, and health care (Hosany & Hamilton, 2023). Marketplaces in these contexts operate at a confluence of uncertainties that emerge from the lack of resources (Viswanathan, 2016). Moreover, consumers in such marketing contexts are constrained not only materially and financially but also cognitively and emotionally (Viswanathan, 2013). These uncertainties arise from extreme material constraints, cognitive and affective challenges in choosing optimal products and services (Viswanathan et al., 2005), and lack of access to marketplaces (Viswanathan et al., 2021). At the marketplace level, these uncertainties emerge from such factors as inadequate infrastructure (Sheth, 2011), and inefficient buyer–seller exchanges (Viswanathan et al., 2010). In contrast with relatively resource-rich markets conventionally studied by marketing scholars, subsistence marketplaces face a scale and scope of inequities that make the problem of addressing consumption problems seemingly intractable, thereby posing a “grand challenge” to the field of marketing.

As such, recent studies have called for scholars to reimagine marketing theory and present forward-looking intellectual frameworks that help elevate the scope and focus of marketing to a higher ground (Mick, 2007) and orient the discipline toward greater responsibility and inclusivity

Madhu Viswanathan, Arun Sreekumar, Srinivas Sridharan, and Gaurav R. Sinha contributed equally to this work.

Dhruv Grewal served as Guest Editor for this article.

✉ Madhu Viswanathan
marketplaceliteracy@gmail.com

Arun Sreekumar
arun.sreekumar2@gmail.com

Srinivas Sridharan
Srinivas.sridharan@monash.edu

Gaurav R. Sinha
grsinha@uga.edu

¹ Loyola Marymount University, Emeritus - University of Illinois, Urbana-Champaign, Champaign, IL, USA

² Indian Institute of Management, Ahmedabad, India

³ Monash University, Clayton, Australia

⁴ University of Georgia, Athens, GA, USA

(de Ruyter et al., 2022) and toward building a better world (Chandy et al., 2021). Literature in marketing has addressed societal challenges broadly in research on public policy, macro marketing, social marketing, marketing ethics, and international consumer policy (Wilkie & Moore, 2003). However, we argue that the literature as well as practice largely reflects a top-down orientation to marketing, from the perspective of the marketing organization. Though advocating an outward-looking orientation and customer centrality, the most heavily cited marketing ideas (e.g., market orientation, SERVQUAL, service-dominant logic, segmentation) have generally been implemented within firms with a top-down marketing orientation. Furthermore, such a theoretical development has predominantly emerged from a US-centric perspective (Wilkie & Moore, 2003, p. 139), whereas grand challenges are quintessentially global—for example, the COVID-19 pandemic affected every country in the world. Therefore, to develop an equitable marketing system that serves all segments of society, reduces inequality, eliminates poverty, and enhances well-being (Wilkie & Moore, 2003), the discipline must seek alternatives to the top-down and US-centric perspectives.

In the past, marketing scholarship has adopted a variety of firm- and consumer-driven approaches to tackle the grand challenge of inequitable consumption in subsistence marketplaces. For example, the stream of literature on base-of-the-pyramid marketing (Prahalad, 2005) recommends that firms take into account the unique circumstances of low-income consumers to develop innovative but affordable solutions for them, thereby improving profits for firms through the sheer volume of sales. Exemplars include research on cost-saving innovations (Williamson, 2010), re-engineered products (Hart & Christensen, 2002), and frugal innovations (Radjou & Prabhu, 2014). Social marketing employs targeted behavioral interventions to overcome specific problems identified as critical (Lefebvre, 2011). More recently, large-scale randomized controlled trials have assessed the behavioral outcomes of targeted interventions addressing those problems (Madan et al., 2023). Transformative consumer research has highlighted the importance of consumer well-being. For example, Hill (1991) provides a detailed and compelling ethnographic account of how low-income consumers cope with extreme marketplace exclusion and consumption inadequacy.

We argue that firm-centric (i.e., top-down) approaches do not address the challenges that subsistence consumers face. They do not adequately address the multitude of social, institutional, cognitive, and behavioral factors that lead to consumption constraints (Woolcock & Narayan, 2000). In other words, they do not capture a bottom-up orientation. The solutions emerging from such reductionist thinking, such as increasing calorie consumption (Deaton & Dreze, 2009), do not address the inequities in subsistence

marketplaces in significant ways. Conversely, purely consumer-centric approaches intended to enhance consumer well-being may underemphasize the strategic priorities of the firm. Furthermore, they are not sufficiently bottom-up and are often viewed from the vantage point of a top-down organizational lens.

We present a bottom-up marketing approach as an effective path forward for marketing research and practice to address the grand challenge of inequality and poverty. In its simplest form, such an approach means beginning with roots at the micro level of ground realities and then traversing upward to develop insights about product development, marketing strategies, business models, and broader sustainable development. By contrast, the top-down approach begins with where an organization is, is framed around what the organization already knows, and is constrained by what the organization desires to achieve. In our view, despite espousing consumer centrality as a fulcrum, the marketing discipline remains embedded in an organizational perspective of markets; that is, the emphasis is top-down even if the intent is bottom-up. In this study, we articulate a counter-perspective but also show how firms can iteratively interweave the macro level; in other words, we challenge conventional wisdom but also offer actionable implications.

This approach emerges from prior work on subsistence marketplaces and is rooted in first understanding those contexts as pre-existing marketplaces, recognizing factors such as the “duality” of individuals being both consumers and entrepreneurs simultaneously (Viswanathan & Rosa, 2007; Viswanathan et al., 2010). This stream of research recognizes that marketplaces in subsistence contexts are embedded in social and cultural exchanges in the community and cannot be studied atomistically and exclusively as arenas for exchanging products and services (Viswanathan et al., 2012). Subsistence contexts are highly unfamiliar and complex for managers to unpack with pre-conceived assumptions developed from their experiences with developed markets. At the same time, purely consumer-driven approaches may be limited by the extreme cognitive and affective constraints faced by subsistence consumers arising from multiple resource scarcities. Therefore, a bottom-up approach is necessary for developing solutions. In this study, we show how the approach that evolved in radically distinct contexts and that characterizes the stream of work on subsistence marketplaces is relevant for all contexts. Adopting this counter-perspective to pervasive top-down approaches, we propose interweaving the bottom-up approach with the macro level.

We begin by reviewing the stream of subsistence marketplaces. We then develop a conceptual framework encompassing general and granular elements of the bottom-up marketing approach. Study 1 employs a retrospective examination of the global diffusion of a marketplace

literacy program to demonstrate general elements of the framework. Study 2 employs a qualitative analysis of five case studies of social enterprise start-ups to demonstrate the more granular elements of the framework. Next, we develop prescriptive recommendations on how traditional marketing approaches should be reimagined for subsistence marketplaces. We do so through a longitudinal study of the evolution of five social enterprises in India. In this way, we demonstrate how the counter-perspective we develop can be interwoven in actionable ways for marketing. In the next section, we review the literature from the stream of subsistence marketplaces.

Subsistence marketplaces

Overview

The evolution of subsistence marketplace scholarship represents a journey over more than two and a half decades (Viswanathan, 2013; Viswanathan & Rosa, 2007; see summary in Web Appendix, Table W1 and Fig. W1). The term “subsistence” refers to a broad range of low-income contexts, from extreme poverty at one end to lower-middle income at the other end. The term “marketplace” emphasizes the need to understand pre-existing exchange practices and is distinct from the term “markets,” which can lead to a mindset of searching for new sales territories for existing products. Subsistence marketplaces are at a confluence of uncertainties, such as in day-to-day life and in being vulnerable to a variety of calamities. Studying such contexts means starting from a vantage point of a confluence of unfamiliarities as marketing researchers, educators, and practitioners. Moreover, each subsistence context is distinct as a function of local culture, social hierarchies, political stability, and different manifestations of extreme resource constraints. These characteristics necessitate a bottom-up orientation to subsistence marketplaces. Uncertainty and distinctiveness are inherent in subsistence contexts, as is unfamiliarity from the outside.

Overall, from this scholarship, a vivid portrait emerges of individuals who are materially poor, with cognitive and emotional constraints due to their low literacy, but have the potential for socially rich relationships in one-to-one interactional settings. Low-literate individuals have difficulties with abstractions leading to concrete thinking using single or a few pieces of information (Viswanathan et al., 2005). They face difficulties in comprehending concepts such as customers or enterprises that are richly formed for others with education and exposure. They display a dependence on sensory modes, such as pictographic thinking, visualizing, picturing brand names or amounts to buy, or picturing currency bills as ways to

“compute.” The role of self-esteem and self-confidence even in mundane shopping interactions is central, as people fear loss of face from being exposed for their lack of literacy and/or income. Consumers engage in several coping behaviors to manage their stress, such as developing rudimentary heuristics or avoiding consumption situations altogether.

The literature has described a marketplace of highly personal one-on-one interactions in which fluid, responsive, and customized exchanges unfold. One-on-one marketing relationships may be enduring and infused with empathy, occurring within the broader context of extreme interdependence and a prevalence of oral–visual communications (Viswanathan et al., 2012). A key characteristic is “consumer-entrepreneur duality,” in which individuals play the dual roles of buyer and seller, exemplified by the term “subsistence consumer merchants” (Viswanathan et al., 2010). Whereas prior research has examined partial notions of duality, such as “prosumers” or consumers involved in co-creation or do-it-yourself production processes (Humphreys & Grayson, 2008), the subsistence marketplaces literature underscores a seamless navigation of both sides of the buyer–seller relationship. Actors within this context exhibit a capacity to empathize with the alternate role, as they frequently share common adversities (Viswanathan et al., 2010). Notably, subsistence consumer merchants operate in marketplaces that blur with social communities, with strong familial and neighborhood ties. Individuals enact dual roles through one-to-one interactions, despite substantial cognitive, emotional, and behavioral constraints.

This research stream has demonstrated the viability of a bottom-up product development process (Viswanathan, 2016; Viswanathan et al., 2012), with such iterative stages as bottom-up immersion (in day-to-day realities), emergence (of new insights), design, innovation, and enterprise. This specialized product development process focuses on life aspirations and community circumstances beyond just the concrete product need. Elsewhere, research has also highlighted marketing practices initiated from the bottom up, such as in stitching together segments, collecting samples for market research, and building distribution pathways (Viswanathan, 2013, 2016). The research stream itself has moved bottom-up, beginning at the micro level of consumer and entrepreneur lives and developing aggregated insights on product development, marketing models, and sustainable development. This stream demonstrates the blurring of products and life circumstances, the social and the economic, and the market and social milieu (Viswanathan et al., 2009). In business model parlance, a parallel blurring between doing good and doing well has also been highlighted.

From a consumer perspective, by focusing on deeper layers of consumer behavior, such as survival fears and aspirational hopes, subsistence marketplaces scholarship has helped shift the frame of marketing from serving consumer needs and wants to fostering consumer survival and thriving. This shift in focus enhances the potential of the marketing discipline to meaningfully address the grand challenge of poverty. The stream bridges marketing theory and its unique vantage point about customers and development through its emphasis on beneficiaries. In summary, the subsistence marketplace stream has attempted to traverse all three domains of marketing highlighted by Achrol and Kotler (2012)—namely, its sub-phenomena (underlying human issues such as consumer behavior), phenomena (marketing firms and their operations), and super-phenomena (larger societal issues such as sustainability and development)—with a foundational starting point, a micro customer–entrepreneur marketplace level, and a bottom-up orientation. Furthermore, a social enterprise to impart marketplace literacy education evolved in parallel with the subsistence marketplaces research stream, which is described subsequently (see summary in Web Appendix, Fig. W1).¹

Bottom-up framework

Drawing from the research described previously, we introduce a comprehensive bottom-up framework for the marketing discipline to address the grand challenge of poverty. The framework covers the underlying principles (the “why”), the approach and strategies (the “how”), and the components (the “what”) of a bottom-up approach to expanding marketing to solve grand challenges. We contrast the framework against the status-quo marketing approach, which we argue is implicitly top-down, with firms routinely focused on their existing knowledge base. A key aspect of our proposed bottom-up framework is the notion of contextual re-grounding. We envision this as a counterpoint to the conventional notion of scaling up and expansion of a successful marketing activity. Conventional expansion is driven by diversification and new profit opportunities and therefore involves a top-down transfer of “proven best practices.” By contrast, the bottom-up marketing approach proposes a re-grounding in each new context—that is, evolving the marketing activity interdependently with and rooted in local populations, priorities, and resources. For example, an organization could be guided by a top-down vision, yet continually create distinct purposes grounded in the distinct user contexts in which it

functions. Its style of evolution and growth could remain the same across user contexts, while the diffusion of its market offerings could vary substantially in each context. It could also operate a common baseline innovation platform but allow insights in each context to help adapt the specific innovation to that context, while also enriching the baseline. All these facets extend the marketing philosophy of understanding customers and its outward orientation to its logical fullest sense.

The why Solving grand challenges requires a grand vision of social change. In user contexts with grand challenges that are filled with much uncertainty and rapid change in ground realities, the principles of a marketing approach (the why) must be proactively evolved. This bottom-up approach evolved in subsistence marketplaces characterized by confluences of uncertainties and of unfamiliarities among marketing researchers, educators, and practitioners. However, it is applicable to grand challenges, and certainly those of poverty and inequality, that share similar characteristics. The complex set of variables and their interplay in ground reality in distinctively different contexts necessitates the bottom-up approach.

For example, when expanding the organization’s work from one context to many, such overarching vision will need to be shared across the contexts. A common vision based not only on the “customer” but also on the community and larger context can then be reconfigured. This is akin to an organization with a broad vision for change serving an important need, reflecting a marketing philosophy. In turn, the larger purpose or mission needs to not just be customized but instead reconfigured on the basis of bottom-up understanding of consumer, community, and context. In a sense, this is diametrically opposite the customization of predetermined solutions. It is also distinct from the classic work on marketing myopia, given an explicit phase of reconfiguring purpose based on the bottom-up.

We use notions of convergence (“moving toward uniformity”; merriam-webster.com) and divergence (“mov[ing] or extend[ing] in different directions from a common point”; merriam-webster.com) to articulate our approach. If a grand challenge such as poverty has universal elements, marketing solutions must be based on a broad vision for change that is also universal. This connotation of convergence is consistent with the marketing philosophy that in any context, the serving of user needs is central. Yet, at the same time, the specific social purpose or the organization’s mission needs iterative reconfiguration as it builds across market contexts. This must involve being attentive to ground realities not only of the organization’s “customers” but also of the broader community at large and contextual realities. This connotation of divergence is not inconsistent with marketing theory

¹ This stream has also led to education on subsistence marketplaces, which is outside the scope of this article.

but is not captured by existing constructs such as customization, which essentially begins with predetermined options. We use these terms as they allow flexibility and reflect a process rather than an outcome.

The how Iterative convergence–divergence also applies to the “how” (i.e., the organization’s marketing strategies, structures, tactics, and operations). For example, the principle of organic rather than acquisitive growth is critical for a social change organization and thus must become a convergent commonality as the organization expands across geographies or other demarcations. Yet the actual implementation of strategies and tactics must be grounded and respond to the distinctive characteristics of each new market. This turns on its head not only the notion of scaling up but also other traditional top-down notions such as segmentation, pricing, distribution, and communication. Crowd-sourcing and brand communities are two notions that have emerged in the social media era that are consistent with the bottom-up marketing approach, but the unique multi-headed nature of grand challenges requires a complete reversal of top-down thinking.

The what Finally, the “what” pertains to the offerings—the goods or services, products, or processes—that provide value to the marketplaces. In this context, the convergent element entails maintaining a foundational baseline offering, while the divergent aspect involves re-creating specific offerings that are shaped by and, in turn, further refine the foundational baseline. The conventional alternative would be a standard product with customizable modules. But in a bottom-up marketing approach, we propose iteratively evolving the convergent and divergent elements organically and gradually. We demonstrate the part of the framework articulated so far in a study on the social enterprise of marketplace literacy.

Study 1: The why, how, and what of the bottom-up marketing approach

Method

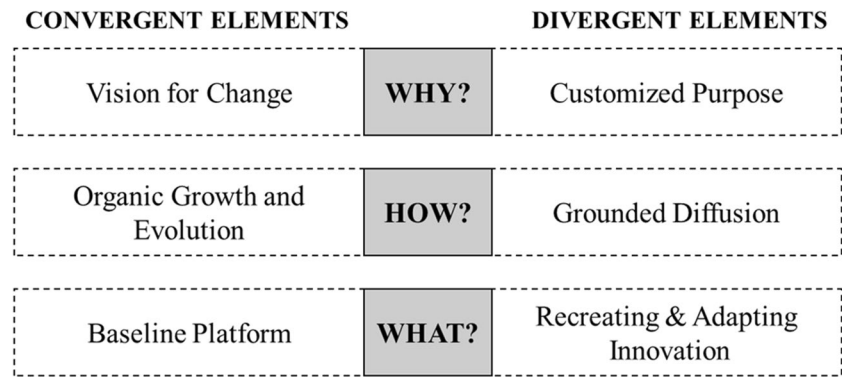
Research context We undertake an in-depth investigation of a single case study (Eisenhardt, 1989) of the Marketplace Literacy Project (MLP). MLP has implemented marketplace literacy education in seven countries (India, United States, Uganda, Tanzania, Argentina, Honduras, and Mexico) and reached more than 100,000 individuals, almost all women, until the onset of the COVID-19 pandemic. MLP was formed as a non-profit organization in the United States in 2003. The focus on marketplace literacy emerged from the subsistence marketplaces research program, and insights about the cognitive and emotional constraints faced by

low-literate, low-income consumers. Marketplace literacy encompasses knowledge and skills at three distinct levels of abstraction: vocational skills (knowing what to buy or sell), process knowledge (know-how to function as a customer or entrepreneur), and causal understanding (the know–why of the functioning as a customer or an entrepreneur or of the broader marketplace) (Viswanathan et al., 2009). The educational program was developed with a specific focus on the know–why level, so that participants could overcome their cognitive and emotional constraints and thrive in the marketplace. For aspiring entrepreneurs, marketplace literacy would help unpack the core consumer need their enterprises would serve (i.e., the “why”). Consequently, marketplace literacy is distinct from traditional programs that focus on aspects such as livelihood training (the “what”) or how to keep accounts or promote a product (the “how”). Content development and delivery was bottom-up, by concretizing, localizing (having contextual relevance), and socializing the material (building on the relational richness of the marketplace/community).

As a social enterprise creating and offering a social innovation in seven countries, MLP serves as a useful setting to observe and derive insights into the practical manifestation of a bottom-up marketing approach. One of the authors pioneered the development of the program, enabling access to rich insights into its origins and overarching goals, and strengthening the reflexive approach of the research (Sherry, 2007). Two other authors also spent several weeks in three of the seven countries immersing themselves in MLP’s activities. During these immersion visits, they developed detailed field notes and participated in marketplace literacy educational sessions to observe the delivery of marketplace literacy in the field.

Data collection Aside from organically gaining insights, we collected qualitative data. Two of the authors not connected with MLP interviewed a cross-section of respondents from the seven country organizations, recorded the interviews, and developed notes independently, without the involvement of the founder-author. Our interviewees represented champions, facilitators, and beneficiaries actively involved in marketplace literacy in different geographies who have experienced our phenomenon of interest (i.e., the global expansion of the program) (for the sample, see Table W2 in the Web Appendix). Aside from some guiding questions, the interviews were open-ended; we went along with the flow of the conversation rather than having a strict sequence of questions, to understand the most pertinent issues for the interviewee. Each interview lasted 30 min to three hours, and we conducted approximately 19 hours of interviews for the study. Interviews took place in two phases. In the first phase, we interviewed 16 people from India, the United States, Uganda, Tanzania, Argentina, Honduras, and Mexico

Fig. 1 General elements of framework



(Web Appendix; Table W2). In the second phase, we interviewed eight people from Tanzania, Honduras, and Mexico. Thus, in total, we interviewed 24 people in this study. Interviews continued until theoretical saturation was reached. We contacted the informants beforehand by email, sharing the purpose of the interview and scheduling it at a convenient time for them. We arranged for translators when required. In most cases, the champions facilitated the interactions and translated the conversation, except in India, where one of the two authors conducting interviews was conversant in the local language.

Data analysis We used a grounded theory approach to code and analyze the interview data. The analysis strategy was two-pronged. At a higher level, we focused on understanding the nature and structure of the program across the countries. At an operational level, we aimed to unpack the locally interpreted marketing nuances of the program in each country. We followed recommended step-by-step procedures. First, we generated initial codes as interpretations of the data, including comparing field notes with the recorded conversations. Next, multiple repeated readings of the data yielded some data reduction by grouping similar codes and some data refinement by recoding some codes into more conceptually nuanced themes. Through this iterative and interpretive process, we learned how the global diffusion of MLP unfolded in a dual pathway, represented by the themes of “convergence” and “divergence.” Convergence connotes isomorphism and similarity, whereas divergence implies dissimilarity, diversity, and discontinuity (DiMaggio & Powell, 1991).

Findings

We organize our findings along three key logics of the diffusion of marketplace literacy: the motivations (why), the processes (how), and the substantive elements that were diffused (what). We outline the twin themes of convergence and divergence in each of the three logics, with specific titles that capture the essence. Throughout this discussion, we

highlight insights that allow inferring a bottom-up logic to the diffusion of this social innovation across specific contextual circumstances (Fig. 1).

Convergence versus divergence in the “why” of diffusion

Convergence: Vision for change The founder-author’s belief that deep understanding of and participation in the marketplace can enable low-literate, low-income individuals to empower and uplift themselves economically and socially led to the marketplace literacy program. This vision of (social) change became crystallized from insights gleaned from the subsistence research program that low literacy causes chronic difficulty in abstract thinking (Viswanathan et al., 2005). It helped focus the MLP program on an understanding of marketplaces rather than exclusively on building vocational marketplace skills. The vision was shared by the champions of the programs in all seven countries and thus became a feature of how the marketplace literacy initiative diffused globally. Such modeling did not occur as a deliberate decision at a single point in time, but rather on a continuous basis and also often intuitively or organically.

Program managers in the United States, Honduras, and Mexico reiterated this theme in different ways (for a fuller listing of quotes, see Web Appendix, Table W3). The team leader in Argentina (Sofia) described the (social) vision of the MLP as “help[ing] subsistence consumers overcome their fears and limitation in buying what they want to buy. When they know what they want and its value in a market setting, they feel in better control of their lives.” Sofia went on to say, “It’s [the] same for such [subsistence] sellers. When they know what business to start and how to do it, they immediately feel like they are now in control of their fate.” In Uganda, where the primary beneficiaries of the program were inhabitants of a large refugee settlement, the MLP vision acquired a specific way of making refugees socially independent and economically self-sufficient. In summary, the vision for (social) change to empower individuals by imparting deep understanding of

and agency in markets led to convergent elements across countries. It also fostered commonality in methodology, in which lived experiences of participants served as platforms from which to cascade up to abstract concepts such as value.

Divergence: Reconfigured purpose across geographies Whereas the vision of (social) change was convergent, the specific social purpose of MLP took on dissimilar and diverse meanings, based on the different realities of social and economic conditions of the beneficiary community in each country. The immediate social outcome of the program needed to be consistent with the local entity's scope. This, in turn, was designed to respond to the life circumstances of the customer/beneficiary and community. In addition, the organizational structure, local functions of the field team or partner organization, and the resources available for implementing the program all differed across different countries. Therefore, the social purpose of the program became divergent and driven by the unique insights gathered by field teams embedded in each community.

In Mexico, a field team implemented marketplace literacy for girls and women facing domestic abuse, with support from a grant from the US State Department (Web Appendix, Table W3, quote #6). The social purpose in this case was to empower women to become capable of earning a living on their own. In Tanzania, the social purpose encompassed helping members of the Masai tribe make judicious marketplace decisions about the use of their natural resources faced with challenges of globalization and climate change (Web Appendix, Table W3, quote #7). An interviewee in Uganda, who educates refugees in marketplace literacy, indirectly described the divergence in the immediate social purpose of MLP (Web Appendix, Table W3, quote #8).

Convergence versus divergence in the "how" of diffusion

Convergence: Organic evolution and growth In each country, marketplace literacy grew organically by enlisting field teams and partner organizations that shared the social vision of "Why MLP" and were deeply connected with their communities (Web Appendix, Table W3, quote #9).

I do not need to report to anyone about MLP. But, we have set our own priorities and goals. At the same time, I am sure that all MLP leaders in different countries have this independence in deciding what to do and how to do it. I have given the same amount of freedom to my field team. They belong to the communities they work with and are the best

judge to decide what is best for their own people. (Maria, program coordinator, Tanzania)

As the quote suggests, local champions often came from the same subsistence settings they sought to serve. They would therefore have the best perspective and judgment to determine how to design, implement, and scale the program within their community of interest. This was a foundational belief of the MLP founder-author, who thus encouraged an organic organizational culture in all countries. This, in turn, ensured that the evolution and growth of marketplace literacy in each country followed an organic rather than structured process. Organizational culture is a set of shared assumptions, expectations, and experiences that affects the way people within an organization interact with one another and with other stakeholders (Schrodt, 2002). The MLP enterprise in each country represented an organic form of organizational culture – a system of values and norms that promotes extensive interaction and open communication, encourages constant exploration and emergent strategies, and sets in motion organic processes of flexibility and spontaneity (Deshpandé et al., 1993). By contrast, a mechanistic culture achieves control, order, and stability and encourages uniformity and predictability in pursuing goals (Quinn & Rohrbaugh, 1983).

Several individual themes revealed facets of such organic evolution and growth (see supporting quotes in Web Appendix, Table W3). Interviews with different stakeholders suggest that design, delivery, deployment, and scaling of marketplace literacy were tied to its intrinsic people-centric nature. The nature of MLP is co-evolving in implementation and scaling, and it adapts on the basis of beneficiaries' feedback and teams' experiences. Snowballing is one of the key strategies behind diffusing marketplace literacy and sustaining it. The marketplace literacy educational program is sustained through its social network with other organizations in the area in its operations and scaling. Interviewees mentioned that the program had encouraged people to become intrinsically motivated to achieve more.

Adaptive organizational cultures are flexible and action-oriented, providing autonomy to smaller units within the organization to make decisions concerning them. Such organizational decisions influence the organizational structure by determining the boundaries within which field team members or the leadership function (Martin, 2001). Clear boundaries included a primary focus on low-income individuals, no monetary incentives to participants, a sustained focus on the quality of change and evolution of participants, and no political or religious influence on the education. For example, the MLP leadership in all countries of operation clearly specified that there would be no payment to participants for attending sessions, except in specific circumstances, such as lost earnings for those

with a demonstrable interest in learning (Web Appendix, Table W3, quote #10).

Divergence: Grounded diffusion across geographies Marketplace literacy has diffused to different countries through the creation of small (dedicated) field teams and partnering with local organizations. The process of how marketplace literacy diffused within each country took on distinct shades depending on the specific nature of market-shaping capabilities demonstrated by each country team (i.e., capabilities of purposively influencing market-level characteristics, such as re-designing exchange, re-configuring networks, and reforming institutions) (Nenonen et al., 2019). Thus, the nature of organizations that support marketplace literacy in different countries is diverse, as are the stakeholders with which these organizations deal. As Ferdinand, the team leader in Uganda, stated (Web Appendix, Table W3, quote #11):

It's a melting pot. I work with refugees, someone else works with vulnerable women. Then there are self-help groups, small entrepreneurs, primitive cultures and what not. Think of it – the diversity in our original roles and goals is mind-boggling.

In the United States, marketplace literacy was supported through a grant by a public university's extension unit. In Uganda and Tanzania, the organizations working on marketplace literacy were non-profit organizations with interests in entrepreneurship education to refugees and nature conservation, respectively. In Argentina and Honduras, marketplace literacy was championed by motivated field team members. In Mexico, marketplace literacy was championed by two women who care deeply about women's autonomy and financial literacy, respectively, with collaboration beginning because of a grant from the US State Department. In India, marketplace literacy was also offered by partner organizations with the purpose of providing marketplace literacy, working with women individually or through self-help groups in urban and rural settings. Diffusing marketplace literacy has the downstream effect of shaping markets in each context. Franco, the field coordinator of the project in the Honduras who was motivated to initiate marketplace literacy in his country after taking a massive open online course on subsistence marketplaces, noted how his work is different from how marketplace literacy is offered in other countries (Web Appendix, Table W3, quote #2).

The same is true of the nature of stakeholder engagement supporting MLP's activities in different geographies. For example, in India, marketplace literacy conducted by one entity was completely funded by personal donations. Another partner in India was a large microfinancing institution, which led to the development of video-based marketplace literacy educational modules. In Tanzania, marketplace

literacy was initially supported through a small field team with personal donations and with funding from outreach at a public university, followed by a large grant to the partner, a conservation organization, made by a multilateral donor agency. The partner was convinced that over time offering marketplace literacy education would help forest-dwelling communities use natural resources efficiently. In Mexico, marketplace literacy was initially supported through a grant from the US State Department, with funding then transitioning to outreach by a public university. In the United States, funding was through a grant from a public university's extension program, but other opportunities have emerged such as a grant for a program for correctional facility inmates. Dave, the team leader in the United States, explained why understanding the local social and economic environment is useful to garner resources (Web Appendix, Table W3, quotes #15 and #16).

Convergence versus divergence in the “what” of diffusion

Convergence: Baseline platform for innovation The baseline educational platform developed in the early stages involved gaining insights, design, delivery, deployment, scaling, and assessment. The broad expanse in each aspect provided a platform of options from which to begin when diffusing across geographies: (1) extensive research using wide-ranging methods in gaining insights and a variety of configurations of detailed content in design; (2) a delivery continuum from face-to-face to video-based; (3) deployment ranging from formation of self-help groups to direct recruitment in urban and rural settings and diffusion in urban and rural settings; and (4) assessment of ability, self-reports, behavioral reports, consumer savings, and enterprise start-ups and earnings. This platform served as a baseline for achieving social innovation and shaping marketplaces and then expanded into all countries in a common and convergent way.

Marketplace literacy comprises four basic components, typically offered in the following order and with a built-in logic of a bottom-up sequence: generic marketplace literacy, consumer literacy, entrepreneurial literacy, and sustainability literacy. Each component has a series of education modules, designed as a semi-structured program. In general, these components and their modules follow a sequence, guided by the bottom-up in all geographies (e.g., learning to be a consumer before being an entrepreneur).

In some countries, such as Mexico, Isabella, one of the field coordinators, mentioned that she felt entrepreneurial literacy was being offered “too early in the program. It's a big jump from being a consumer to being an entrepreneur.” However, over time, she believed that the components flowed seamlessly and should be maintained as they are.

Isabella added, “There is a structure and reason for keeping the modules in this structure. Why change it when we have seen proven results elsewhere?” Team members from different geographies conveyed a similar impression (Web Appendix, Table W3, quotes #20 and #21). Thus, prior insights are pitted against bottom-up realities in determining pathways forward, iterating here between the bottom-up and the macro level.

MLP has key commonalities across all countries of its operation. First, the program’s selection criteria are clearly determined in terms of individuals with a wide range of low income and low to moderate literacy. Second, the design of the program developed from bottom-up experience provides baseline elements, such as a focus on the know-why covering consumer and entrepreneurial aspects and an emphasis on delivery through a bottom-up mode of education. The mode of delivery of marketplace literacy is fine-tuned through multiple pilot tests for what best suits the specific context. A broad set of assessment tools test the marketplace literacy of participants before and after the program in terms of skills and knowledge, self-confidence, awareness of rights, behavioral changes as customers and entrepreneurs, and savings as customers and earnings as entrepreneurs. We note, however, that such impact measurement should also be bottom-up and evolve with contexts and time. Such a baseline platform enables outcome and impact measurement across countries with bottom-up re-creation, regardless of who is facilitating or delivering the program. Alice, a field coordinator in Tanzania, recalls the challenges associated with adapting these assessment tools to the organizational process of her own non-profit (Web Appendix, Table W3, quote #21).

It was difficult initially. We are a conservation organization. Our goals are different, and we have different metrics for evaluating the success of the program. It was challenging to use the standards of MLP and match our own project’s logical framework with it. It took a lot of back and forth. But we understood that these standards [of MLP] were time-tested and were probably the best way to ensure that the program was being delivered in an effective manner. Over time, we integrated that into our own logical framework. We are now using the same framework to evaluate the Masai women who have taken MLP trainings.

Divergence: Re-creating innovation across geographies Some elements of marketplace literacy are re-created (not just customized) to suit the local requirements of the partner organization and the community being served. Beyond the language of course content, marketplace literacy education involves the use of metaphors and localized examples to make the content more vivid and relatable

to local audiences. These elements are also unique to the cultural context of the country. For example, instructors in India explained how they tie marketplace literacy to day-to-day operations of farming, as some of their beneficiaries are involved in agriculture. The content may be modified or new content added to reflect the social purpose of the partner organization. In Tanzania, where the primary mandate of the partner organization is environmental conservation, a module on sustainability literacy was developed. Similarly, local teachers in Mexico used examples from the social setting to add elements of women empowerment to the educational program. As Martina, an instructor in Mexico, said (Web Appendix, Table W3, quote #22).

We have to make the content interesting for women, many of [whom] have been beaten by their own husbands. They are afraid to speak up. So, all our examples are of local women who have been successful, without depending on their families or spouses. After some time, women start seeing themselves in these examples. It makes them feel more powerful, as if you know, they can become powerful too. It may seem ordinary, but in that situation, it is life-changing. It is those examples which help us achieve such results.

The program in the United States is most distinctive in this regard, re-created to an advanced economy and having a detailed version of sustainability literacy, as well as consumer literacy, in an advanced economy. Moreover, it has been coupled with three-dimensional printing and maker literacy as teaching tools. With the overarching social vision of low-income beneficiaries of marketplace literacy, the program includes a broad range of individuals based on their social and cultural backgrounds even within each country. The participants were determined by the partner organizations according to their region of influence, domain of interest, organizational mandate, and requirements of the funding agency (Web Appendix, Table W3, quote #26).

In the United States, Argentina, and Honduras, in addition to the general population of adults, school-age children and youth have been participants. In Mexico, the target beneficiaries, as mentioned previously, were women or girls who were potential or actual victims of domestic abuse. To a great extent, this selection of beneficiaries guides the other divergent elements of marketplace literacy in Mexico, such as an additional emphasis on autonomy. In Tanzania, marketplace literacy aimed to reach men and women from the Masai community. In India, the organization used a differentiated strategy for beneficiary selection in rural and urban areas, based on operational efficiency. In rural areas, the team found reaching out to women and explaining the benefits of marketplace literacy education easier. In urban areas,

the program was exclusively designed for female members of self-help groups.

The mode of delivery of marketplace literacy depends on needs of beneficiaries, scale of the literacy education, available infrastructure, and the local technology ecosystem. In India, the program diffused to different villages and among urban communities, with a video-based mode that required the presence of a facilitator. In Mexico, the education stressed maximizing participation of the beneficiaries, so that they feel confident speaking in a group setting, with a video-based mode. In Tanzania, Argentina, and Honduras, the presence of a teacher/facilitator familiar to the beneficiaries was an essential component of the learning environment. In Uganda and Tanzania, marketplace literacy was offered through a mix of classroom sessions, simulated shopping experience, activities, visits to marketplaces, and slideshows on the computer (see, e.g., Web Appendix, Table W3, quote #24).

The local technology ecosystem is also an important determinant of how marketplace literacy education is offered. Running the educational program in a classroom-like setting requires a blackboard, an enclosed room, and seating arrangements. However, in remote villages in Tanzania, for example, such an arrangement was difficult and less suitable, as the education was often more conversational and in an outdoor setting. Meeting underneath trees was sometimes the alternative used, though extreme heat was an obstacle. In turn, meeting in the evening after dark could bring the danger of roving elephants. Similarly, the use of slideshows requires electricity, a projector, and a white screen, all of which can be difficult to find in rural or remote areas without prior arrangement. In some cases, the mode of delivery was determined by the instructor on the spot, depending on the size of the group and the facilities available at the time (Web Appendix, Table W3, quote #25).

Summary We have described general elements of the bottom-up marketing approach (Fig. 1). In doing so, we used notions of convergence and divergence in terms of the why (vision for change and customized purpose, respectively), the how (organic growth and grounded diffusion, respectively), and the what (baseline platform and re-creating and adapting innovation, respectively).

Study 2: Implementing the bottom-up marketing approach

Framework

We now develop the granular elements of the bottom-up marketing framework demonstrated through a study of five social enterprise firms. Continuing the description of the

framework in Fig. 1, we present four elements of the shift in mindsets: embracing unfamiliarity, exploring new ideas, co-evolving with collaborators, and perspective-taking. For each element, we elaborate on the contrast with the top-down approach. Embracing unfamiliarity means that all levels of leaders willingly immerse themselves in the ground reality of their organization. Organizational routines must be crafted and integrated to support this quest. Changing one's mindset is a challenging task, demanding proactive and sustained effort. Likewise, the approach of exploration (vs. exploitation) necessitates adopting a marketplace-oriented mindset rather than a traditional market-based one. Doing so allows new information to filter in before specific courses of action are determined. Co-evolving is central in charting out pathways bottom-up with collaborators. Closely aligned with this is perspective-taking rather than premature narrowing. We provide specific implications in Web Appendix, Table W6.

We also present three phases of interweaving the bottom-up with the macro level: iteratively immersing, empathizing, and framing. For example, the immersion phase begins with a micro-level unlearning and new-learning process undertaken by members of the organization and then moves to a collective macro-level systems thinking and abductive reasoning stage. Similarly, the empathizing phase begins with field-level actions of showing compassion to and eliciting contemplation from participants and then moves to abstracting narratives and having them validated by a diverse range of stakeholders.

Method

Study 2 examines five separate social enterprise start-ups with which we are unaffiliated. We trace how an organization's journey starts from the moment of initial setbacks, progresses through a fundamental shift in the mindsets of the founders or leaders of the organization, and then achieves its aims when it attains a seamless interweaving of the bottom-up and macro level in a complementary manner. When extended to marketers, the moment is one of reflection and reinvention rather than failure. We unpack at a more granular level the process by which an individual organization may undertake a journey of the bottom-up marketing approach. Observing social enterprises also allows us to draw closer parallels to mainstream businesses and marketers. Although social enterprises' primary mission is to solve social problems, they do so by using market methods and a market-based organizational form.

We take an emic approach to define setbacks of the sampled ventures in their initial stages; that is, the market performance of the ventures did not meet the expectations and aspirations of the principal founders. Therefore, they had to voluntarily discontinue marketing initial solutions

(i.e., products or services) to consumers. Note that failure in this study does not mean that the ventures shuttered their operations or that teams disintegrated; rather, the ventures faced a setback in their initial attempt to solve a social problem in a subsistence context and had to rethink the strategy, tactics, and approaches toward working for the betterment of consumers in subsistence marketplaces. The interviews and field visits took place during these phases of resilience, after the founders and team members decided to start afresh following the setback. Thus, we gain unique insight by focusing on “what changed” (rather than on past mistakes) in the marketing approach of the sampled social enterprises.

Research context We employed a discovery-oriented, multi-case study approach (Eisenhardt, 1989) in line with prior theory development efforts in marketing (e.g., Challagalla et al., 2014). We chose an early-stage start-up incubator attached to an Indian business school for selecting cases. This incubator provides early-stage capital and operational support to more than 50 start-ups per year, across three separate funds. We chose the start-ups supported by a fund that focuses on “transformational entrepreneurship” to solve pressing global challenges in rural India. The start-ups in this fund are at the early stages of ideation, which the incubator supports until the launch of their solution in the market through seed and Series A stage funding. The engagement of this incubator with start-ups goes beyond capital investment; it extends to product development support (e.g., makerspaces, design labs), operational support (e.g., training, advisory services), and logistical support (e.g., office space, access to databases). More important, the incubator recognizes that social entrepreneurship is challenging given the complexity of problems being addressed. Thus, if a venture’s solution fails in market trials, the incubator extends its support for testing new ideas as long as the ideas are pitched to the incubator’s board anew.

One of the authors has been associated with the incubator as an adviser for a few years. This provided the research team ready access to the start-up teams and their mentors. To create a contrast between top-down and bottom-up approaches to marketing, we purposively selected start-ups that had failed in their initial marketing trial and attributed their failure to a poor understanding of their consumers’ needs and social realities.

Data collection We combined interviews, archival data, and observations. To understand the context before the study, we conducted five interviews with “mentors,” who are experts with an advisory role in the incubator (see sample in Web Appendix, Table W4). These interviews helped us understand the incubator’s portfolio of start-ups and identify 14

start-ups that were in the “pivoting” stage.² We then interviewed the founders of these start-ups to understand their reasons for initial failure and pivoting. We purposively sampled five new ventures from the initial set of 14 using three criteria: (1) the venture’s solution was exclusively targeted to subsistence consumers; (2) the venture’s initial setback, as perceived by the founders, was due to a lack of product-market fit (Gimmon & Levie, 2021) rather than a lack of infusion of investments; and (3) the venture’s team was actively working on designing a new solution or changing the business model through customer research. This approach aligns with prior studies in marketing that use cases for theory building (e.g., Coviello & Joseph, 2012). We recruited respondents who either had an important role in the selected ventures or were stakeholders (e.g., mentors) who closely observed the venture’s functioning. Our sample consisted of five cases, each representing a venture from one of the following domains: education, clean energy, agricultural finance, health services, and sanitation. We interviewed 16 team members (including founders) and five mentors (Web Appendix, Table W4).

We explored a granular version of our overall research goal of evolving the bottom-up marketing approach: How do ventures use the bottom-up marketing approach to solve social problems? We began the first phase of data collection by conducting unstructured interviews with start-up founders and team members. These interviews began with grand-tour questions (e.g., “What is your venture’s ambition? How does this translate to your short-term goals?”) and moved on to questions focused on respondents’ current product development and business model development efforts. We also asked about how they conducted market research and the process they used to translate consumer problems into market solutions. All the interviews, which lasted between 1 hour and 30 min and 2 hours, took place in a cafeteria located on the incubator’s campus. In this phase, we also asked the founders to share internal documents (e.g., anonymized email correspondence, grant proposals) that would help inform the research questions.

In the second phase, we participated in seven team meetings by silently observing discussions. These meetings took place during various stages of the venture’s pivoting journey. The topics discussed in these meetings included taking stock of past failure, creating a plan for market research, collating team members’ insights from consumer interviews and field visits, brainstorming for new product and business ideas, and discussing feedback from mentors. During this phase, we also made three field visits along with team members;

² “Pivoting” is a term the incubator uses to describe the phase at which start-ups redefine their products and/or business models because of problems identified in their previous market trial.

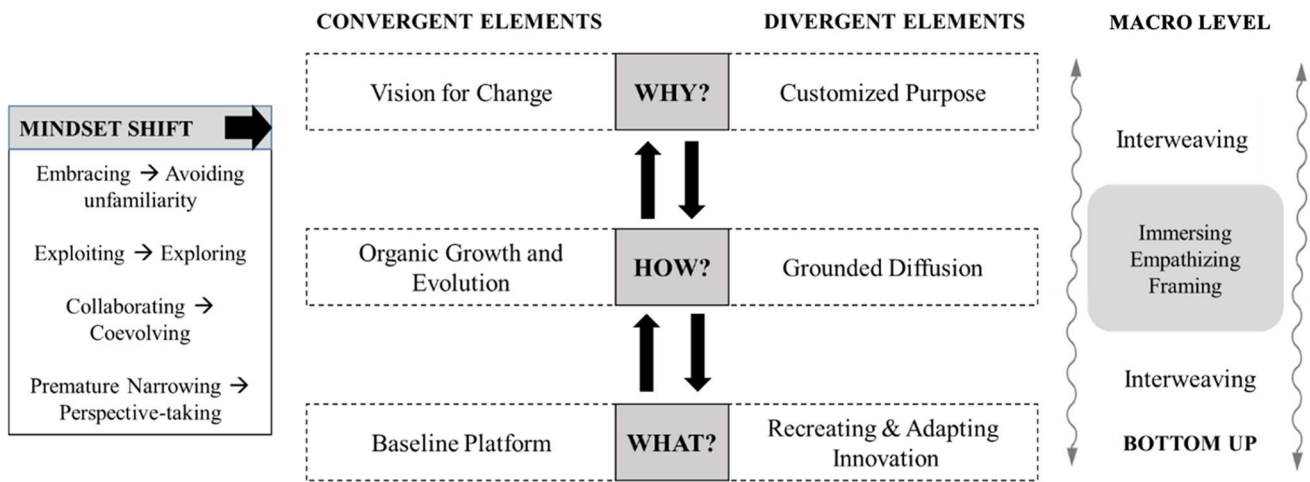


Fig. 2 General and granular elements of bottom-up marketing framework

these visits involved 10–14-day-long immersions in villages, with activities ranging from unobtrusive observation to depth interviews with subsistence consumers. During the visits, we played the role of passive observers, shadowing the venture’s team members during the day. We maintained extensive field notes during these visits.

Data analysis Our unit of analysis is the venture’s team and its associated mentors. We began with an in-depth reading of archival documents, such as reports, slide decks, project proposals, and email communications. The goal of this process was to contextualize the remaining data and develop an understanding of each venture’s motivation during the pivoting process. This is line with Eisenhardt’s (1989) recommendation that theoretical development relies on its connection with empirical reality. We then moved to the interview transcripts, notes from attending venture meetings, and notes from the field visits. During the first round of coding, we paid attention to recurring topics of discussion that captured the key questions of the interview and our own research question. We also allowed new codes to emerge generatively from the data that were not necessarily connected with the questions asked in the interview. Next, we coded field notes to find support or to challenge our findings; we repeated this process until no longer generating new insights.

We used axial, second-order coding to search for relationships between codes and converted them into higher-order categories. To make sense of the categories, we returned to the academic literature in some cases, particularly the streams of literature on entrepreneurial ideation and subsistence marketplaces. Finally, we performed selective coding (Strauss & Corbin, 1998) to identify the core construct of bottom-up marketing. To validate our findings, we used member checks, asking venture team members and mentors

if our findings corresponded to their experience. After these discussions, we revisited and revised details in the findings.

Findings

Our data suggest that the journey toward resilience and ideation with a fresh perspective begins with a change of mindset. We summarize this mindset shift as a process involving four key elements: unfamiliarity embracing (vs. avoiding), exploring (vs. exploiting), co-evolving (vs. collaborating), and perspective-taking (vs. premature narrowing) (Fig. 2). We overlay these granular elements on either side of the general themes from Fig. 1 to provide the complete framework, including general and granular elements. These elements combine to form the bottom-up marketing journey, which is a reflective and iterative process rather than a linear and sequential one. These mindset shifts later manifest in collective decisions by the ventures’ founders and team members as they move forward from the setback. Although the anchors of the themes represent extremes, the mindsets of venture founders and team members were heterogeneous (Web Appendix, Table W5).

Embracing versus avoiding unfamiliarity All interviewees noted that a major reason for their initial failure was that the teams had made incorrect assumptions about the context of subsistence marketplaces and the behavior of subsistence consumers that became evident over time. These assumptions initially made by founders became more entrenched as team members worked on developing products and business models through five interrelated phases: (1) specifying the challenge to solve in a particular facet of subsistence consumers’ lives (e.g., lack of teaching aids for low-literate

parents of primary school-age children), (2) creating a solution to this challenge (e.g., pictorial teaching aids for parents), (3) articulating the impact of the solution (e.g., parents becoming more involved in their children's education), (4) determining the distribution model (e.g., school teachers introducing the teaching aids to parents), and (5) identifying implementation partners (e.g., government-run primary schools). Team members stated that, even when opinions from external stakeholders indicated that the assumptions were misplaced, the founders would dismiss or ignore them. Most of the founders acknowledged that they were aware of the social and cultural complexity in subsistence contexts, but they nevertheless chose not to address it in initial phases because of their confidence in the solutions their teams had developed. This represents a top-down imposition of product or solution (see Web Appendix, Table W5, quote #1).³

After their initial failure, teams realized that their pre-conceptions of subsistence marketplaces were erroneous. As the founder of the venture in Case 2 said, "More than a change in our approach, we had to change our mindset" (i.e., embracing market unfamiliarity rather than avoiding it). Market unfamiliarity refers to the extent to which the founders are unfamiliar with the usage environment of their product/service solution in the market space. It is similar to, though qualitatively of a different order of magnitude than, the notion of "problem unfamiliarity" in new product development. In the latter case, a new product development team lacks precise knowledge of product users' environment and their latent needs (Nagaraj et al., 2020). As markets become more unfamiliar, cognitive inertia becomes a barrier, in that unfamiliar situations are interpreted as familiar ones and new and surprising information becomes normalized (Weick, 2006). In other words, the typical fallback or default is to be top-down.

Embracing market unfamiliarity begins with acceptance of the distinctiveness and complexity of subsistence marketplaces as a source of new ideas rather than as a threat to preconceived ideas. The shift in mindset from avoiding to embracing unfamiliarity manifests in three ways. First, teams form a problem statement that allows flexibility in revising the problem and expanding the solution space. For example, early documents of Case 4 articulated the central problem as a "lack of credible nutrition and health-related information available to pregnant mothers" (Web Appendix, Table W5, quote #2). Second, ventures expand the boundaries of their

solution space. Founders and team members brainstorm about the new resources and capabilities they are willing to develop if the problem statement evolves significantly. Case 2 was a technology-focused venture until its initial failure. It then decided to include a behavioral scientist and a marketing specialist in the team to gain the flexibility to work on innovative business models instead of improving the technology as it learned from unfamiliar subsistence marketplaces. Third, ventures realize the need to take a user-centric approach to change their perspectives on the realities of subsistence marketplaces. To do so, they shift from reliance on surveys, secondary information, past experiences, and advice from mentors to immersion in subsistence marketplaces to understand the unknown aspects of the culture, society, and consumer behavior. This immersion is the foundation of the bottom-up marketing approach.

Exploring versus exploiting Our data suggest that, after the initial failure, venture founders lean toward marketing exploitation rather than exploration.⁴ The reasons for this inclination are threefold. First, exploration is costly because it requires adding new capabilities and changing routines. The additional costs after a failure necessitate scouting for new investors, increasing borrowed capital, or investing founders' resources, all of which are challenging immediately after solution failure. Second, exploration is a time-consuming process and thus is in direct conflict with founders' sense of urgency to solve pressing problems in subsistence marketplaces. Founders may also believe that team members' dedication to the venture may wane during the exploration process. Third, exploration is non-directional without a well-defined outcome. As the founder of Case 5 said, "I had to constantly question myself, what if nothing comes out of our new search for consumer problems. Will we have to shut down? Will we have the room to pivot?" Exploration as described here is akin to a broad bottom-up immersion articulated in the stream on subsistence marketplaces (Viswanathan, 2016).

However, when mentors get involved, founders' thinking undergoes a significant shift from marketing exploitation to exploration. Mentors achieve this in two ways: reminding founders of their overarching vision and structuring the process of marketing exploration. Quotes from mentors

³ This process is also emblematic of the "entrepreneurial hustle" – an entrepreneur's urgent, unorthodox actions that are intended to be useful in addressing immediate challenges and opportunities under conditions of uncertainty (Fisher et al., 2020). Though equally relevant to all situations of entrepreneurship, the entrepreneurial hustle is even more pronounced in subsistence contexts, driven by a sense of immediacy in solving what is perceived as a pressing societal challenge.

⁴ We refer to the marketing strategy learning approaches of exploration and exploitation as explained by Kyriakopoulos and Moorman (2004). Marketing exploitation strategies involve making incremental changes to existing marketing strategies, such as the marketing mix, by leveraging existing capabilities and processes. By contrast, marketing exploration involves making radical changes to prior marketing strategies by generatively learning new knowledge and skills from the external environment.

exemplify their role in the shift of ventures from exploitation to exploration (Web Appendix, Table W5, quotes #3 and #4).

Mentor (Case 5): I set a limit for [the founders]. Six months. That is how long the incubator could continue to support them. Take the first two or three months to go to the grassroots and understand how people store and get drinking water. Another couple of months to get back on the drawing board. And then find partners and get some pilots running by the sixth month.

Co-evolving versus collaborating Co-evolving versus collaborating represents the “how” of the bottom-up marketing approach. Conventional wisdom suggests that social enterprises benefit from partnerships with local value-chain stakeholders, such as small and medium-sized enterprises, non-governmental organizations (NGOs) and community-based organizations (Rivera-Santos et al., 2012). When the focal problem and solution are predetermined, ventures search downstream markets for partners that are willing to collaborate to promote or market the solution to subsistence consumers. The process of collaboration involves back-and-forth conversations between the venture and the potential partner on the nature of the solution and on aligning business interests and operational processes. An email exchange between the founder of Case 2 and a local NGO sheds light on collaboration (Web Appendix, Table W5, quotes #5 and #6). As illustrated, the nature and scope of the solution and its intended customers are already decided at the outset. The outcome of the collaboration effort depends on how well a venture’s solution and business model are aligned with the mandate and resources of the potential partner. With a focus on costs, benefits, and operational aspects, there is little scope for mutual learning between the venture and the partner.

A shift from a top-down to a bottom-up approach involves approaching partnerships as co-evolving opportunities rather than business collaborations (Viswanathan, 2016). Local stakeholders are valuable sources of knowledge about how cultural traditions, institutions, and social norms influence the behavior of subsistence consumers. Gaining such knowledge is necessary at the ideation stage of the venture’s product or service, not just at the implementation stage when marketing functions are outsourced to collaborating partners. Ventures in our sample needed to include local stakeholders in ideation and brainstorming discussions at the stage of developing a new product after their initial failures (Web Appendix, Table W5, quote #7).

Perspective-taking versus premature narrowing Embracing unfamiliarity, exploring contexts, and co-evolving with partners gradually help the founders become comfortable with taking a clear perspective of problems and solutions. This

perspective taking is in contrast with what is referred to in the literature as “need for cognitive closure” (i.e., a desire for a quick and firm answer to a question) (Kruglanski & Webster, 1996). Situational factors prevalent in subsistence contexts, such as high environmental uncertainty, and individual differences can drive a founder’s need for cognitive closure. When this need is high, the perceived benefits of closure are foregrounded, its perceived costs become de-emphasized, and, as a result, premature narrowing to a specific set of ideas ensues. The bottom-up marketing approach enables managers to challenge assumptions and shift their marketing perspective by immersing themselves in unfamiliar contexts. However, an initial obstacle to this approach is the lack of appreciation for subjective experiences and learning from immersion (vs. reliance on narrower insights from quantitative data). Important here is to both converge and diverge rather than remain in one mode or prematurely converge. An informant noted the nature of this challenge faced by her team members (Web Appendix, Table W5, quote #8).

Summary Each of the four subthemes helps move an organization along the bottom-up journey (Fig. 2).⁵ A shifting mindset is essential, as subsistence contexts are unfamiliar to an external organization, and thus allows it to transcend beyond what it already knows. Such a mindset reflects the essence of the bottom-up orientation evolved in the subsistence marketplaces research stream. What then follows is exploring (vs. exploiting) what has been labeled “marketplaces” in this research stream. An organization adopts a learning mindset to determine whether and where it fits in the overall problem-and-solution space. This then paves the way for co-evolving with other entities as one among several value creators. Conventionally, marketing strategy has been conceptualized as a focal firm’s complex set of efforts to develop markets in its self-interest while outdoing its peers (Hunt & Morgan, 1997). In such a paradigm, any collaboration between firms tends to be instrumental, and its parameters and success indicators are tightly pre-defined. For example, the idea of cooptation (i.e., limited collaboration between competing firms) emerged in the literature but remained driven by self-interest (Ho & Ganesan, 2013). By contrast, we describe co-evolving as collaboration that is driven by collective interest and consumer well-being.

⁵ However, the journey cannot begin in the first place without the recognition and tolerance of an initial failure. Recent views in marketing emphasize a “failure-tolerant organizational culture” in which failures are openly addressed and treated as learning episodes (Vomborg et al., 2020). Such a norm of constructively handling initial failures is necessary for an organization to engender the mindset shifts we describe. Lacking such a norm, organizations may endlessly tinker with marginal improvements in solutions without a more fundamental shift in mindset (Fig. 1).

This description substantially moves the marketing strategy dialogue along the direction of collective strategy making, adding to emerging ideas of collaborative market driving (Maciel & Fischer, 2020).

A final subtheme related to perspective taking is giving pause so as to connect the dots. The proverbial “dots” here are issues and opportunities, and the mindset requires avoiding prematurely zeroing in on predetermined issues, as doing so would neglect the multitude of issues and their interconnections. In other words, this theme is about determining what the dots are and can be before connecting a subset of them. The literature commonly uses related terms such as “collaboration,” “customization,” and “co-creation.” However, in our view, such terms are outcome-focused rather than process-focused and embody a top-down flow of strategy, in contrary to a bottom-up journey of exploration and co-evolution.

We asked mentors how the shift in mindsets that emerged from our data may apply to other ventures within the incubator’s transformational entrepreneurship program. The general view was that when ventures seek to develop solutions for markets that are either unfamiliar to the founders or volatile and evolving by nature, a top-down approach to marketing has high chances of failure. Conversations within the incubator that were started during the author’s engagement with mentors for this research emphasized the need to rethink the nature of support provided to start-ups that aim to address complex social problems.

Mentor (Case 5): You will observe here [in the incubator] that all founders are in a hurry, mostly because of the “win fast or lose” culture that is being promoted. This approach does not work for start-ups working on radical ideas to solve real, hard problems. We need to slow them down, allow more exploration, more experimentation. Merely giving them advice or mentoring is not enough to change how they approach social problems.

Shifting mindsets by exploring, co-evolving, and perspective-taking were recognized as requiring deep engagement with the context of intervention. The incubator’s leadership acknowledged that start-up founders need to have the time, space, and opportunities to develop a grounded perspective of the problems they intend to solve. These discussions were intended to rectify the “worryingly high failure rates of social ventures that are working on misidentified problems and learn from the ones that did well” (Mentor, Case 1). A few months after data collection for this research ended, the incubator instituted a generously funded “discovery fellowship program” for start-up founders to spend six months in the field to interact with multiple stakeholders before developing solutions.

Interweaving bottom-up and macro levels

A key moment of transition following the shift in mindsets is when iterative interweaving occurs between the bottom-up and macro levels. Research has referred to this as a dance between the bottom-up and top-down in the subsistence marketplaces stream (Viswanathan, 2016). The literature in this stream reiterates that neither approach is superior but that the bottom-up approach is more difficult and often neglected in unfamiliar contexts filled with uncertainty. Although respondents reported shifts in their mindset toward the former after their initial setback and reflections, during interviews and field visits we did not observe a complete abandonment of the latter. Instead, we found that founders and team members preserve both upward- and downward-flowing ideas and allow them to reciprocally influence each other in designing eventual interventions.

Founder (Case 4): When you don’t understand the situation in the villages well enough ... the complexities involved in that situation ... the starting point itself is wrong. We tried to generalize the problems without understanding the peculiarities. But that doesn’t mean that we only focus on peculiarities, because that will mean developing something for a very small target group. I guess it is a mix of both understanding peculiarities and generalizing simultaneously.

Our data show that the interweaving of micro and macro levels occurs through three interrelated rather than sequential processes: (1) immersing, (2) empathizing, and (3) framing.⁶

Bottom-up immersion The learning process starts with founders and team members selecting a few sites that present extreme forms of the challenge that the venture aims to address. The site may be a single village or a cluster of villages, where the team members make multiple visits over the course of a few months. The selection of these “learning” sites is guided by information available from the internet, founders’ own experiences, recommendation by mentors, and recommendation by founders of other ventures operating in the same domain. For example, if the focal challenge

⁶ Interweaving in another context has been described as a means to integrate research and practice: “Our problem is to find a way by which the specialist’s kind of knowledge and the executive’s kind of knowledge can be joined” (Follett, 1924, p. 70). Follett explains that knowledge about a new situation is cocreated through a process of interweaving situation-specific knowledge and an individual’s specialist knowledge. Rather than merely aggregating these two diverse strands of knowledge, interweaving involves understanding the situation holistically by reciprocally and continuously relating contextual understanding to specialists’ insights (Stout & Love, 2015).

the venture wants to solve is the poor quality of primary education in rural areas, the founders may choose a cluster of villages with high rates of dropout from the local primary school.

Founder (Case 1): We looked at reports of learning assessment surveys published by various NGOs and also consulted district-level data of primary school completion. After identifying a few potential places, we zeroed in on villages where we could travel in a day and where we could stay in a hotel not farther than five to six kilometers. I travel(ed) alone a few times to a few villages, maybe three to four times, to meet people there and see if they were willing to let us be there. It took me a month to finally decide where we wanted to go as a team.

During these learning trips, team members spend the first few days acquainting themselves with the local leaders and village elders to gain their support. For the first few days, they make their presence felt by participating in community gatherings, weddings, festivals, and places where villagers frequent. As a team member of Case 4 said, “After two visits, the villagers knew us by name, and we knew them by theirs. We waited till there was such a level of comfort that natural conversations did not get disrupted by us being present.” Team members also use the initial days to understand the cultural and social milieu of the learning site. Almost all interviews affirmed the importance of developing such understanding to contextualize the behaviors of individual consumers observed later.

After developing initial familiarity, team members selected individual consumers and households to observe more closely. The team discussed and determined the consumption situations that could be of potential interest for observing behaviors. For example, for a venture that aims to solve the lack of scientifically validated information available to pregnant mothers (Case 4), consumption situations may include visits to the health center, interactions with elders in the household, visits to the market to purchase medicines and grocery, cooking food at home, and using smartphones to watch health-related videos. When the team is back at the learning site, they embed in spaces where these consumption situations are performed. They view observation not as an opportunity to conduct an interview or collect data but as a means for unlearning what they know about consumer behavior and for shifting their perspectives about how behaviors are shaped and performed (Web Appendix, Table W5, quote #9).

Macro-level synthesis of immersion On average, we found that the teams in our sample conducted five visits to immerse themselves in subsistence contexts to observe consumers

without intrusion. After the first or the first few visits, team members who have gone through the immersion exercise meet to synthesize their observations. At this stage, the teams may consult with experts’ about their observations. During the process of synthesis, the aim is to take a systemic or “gestalt” view of the problems observed. The focus is on examining not only the specific problems but also the environment in which that problem exists. Discussions revolve around what the consumers’ needs connected with the problem are, how these relate to the consumers’ environment, what the observed social factors influencing or causing the problem are, and how the local market addresses, ignores, or exacerbates the problem. This process of synthesis involves abductive reasoning (Martin, 2010) that uses experts’ and team members’ specialist knowledge to find explanations for the observed problems.

Team member (Case 2): It surprised us to see that despite the amount of smoke in kitchens, there was hardly any ventilation in those spaces. Making a hole to their temporary walls is easy ... it is not difficult to make windows even after houses are built. One of our team members observed that some women were cooking food outside. Back in our office, when we put these two observations together, we realized that cooking indoors mostly happens in extreme weather, when the women would like to keep the kitchens protected from rain or cold. In pleasant weather, women tend to cook outside. Hence, we learned that our cookstoves should be portable. Connecting to a power source will not work outside.

As evident from the quote, the process of abduction is not necessarily analytical; it also blends intuitive thinking at the time of synthesis. The process of observation and synthesis is iterative and repeats until team members feel confident that they have understood the problem to design the form and features of their new solution. There is a wide range in the number of iterations and the duration of each iteration across teams. In Case 5, the founders and team members conducted 14 field visits, each lasting for about three days, punctuated by synthesizing observations in between. The team of Case 3, by contrast, conducted only three field visits, with each visit lasting about three weeks.

Bottom-up deep empathizing In the next phase, members of the venture return to the community to present their findings and assumptions from the synthesis process. A team member described the process of conducting the second round of interactions (Web Appendix, Table W5, quote #10):

This form of “deep listening” involves paying attention to layers of meaning and emotion that are entrenched in conversations, as opposed to simply hearing words on the surface

(Hart, 2023). Deep listening involves developing an emotional connection with the experiences of the speaker. When interacting with the community after developing familiarity with members during the observation phase, we found that the conversations tend to be emotionally rich; expressions of frustration are as common as expressions of surprise and curiosity when community members respond to the venture team's observations. These reactions and personal accounts of community members help the venture team develop a deeper cognitive and emotional understanding of the situation, the problems, and the practicality of potential solutions. Venture team members respond to such emotionally rich accounts by expressing sympathy (e.g., "We observed this in other villages too; this is a big problem") and empathy (e.g., "I am already experiencing how your eyes burn in that kitchen"). In this regard, the subsistence marketplaces literature has described immersion as the process of moving from sympathy to informed empathy (Viswanathan, 2016). At the same time, the venture team also must tactfully encourage the speaker to contemplate more deeply about the causes of the problems described. A team member of Case 1 described this process of moving back and forth between expressing compassion and encouraging contemplation as follows:

What some women said how their own children had to suffer because of water-borne diseases was deeply moving. As she spoke, we held a glass of that dirty, brown water in our hands. One can get so captivated by such accounts that it becomes challenging to ask anything more. We just kept silent for some time. Gradually, we started asking, "How could this be avoided?" "What would you have done differently?" Because, we have to zoom in [to] their struggles and also zoom out at some point to create the bigger picture.

Respondents noted that they often heard conflicting perspectives from community members. As each conversation has personal stories and experiences as the focal point, contradicting or questioning the interviewee's perspectives became challenging for the interviewer. In such situations, empathetically narrating others' accounts helped prompt community members to explain why their own experience may differ from others'. As a team member said, "We cannot resolve conflicting statements, because we have simply not lived their lives. We let individuals [community members] do it themselves by telling other individuals' stories." By doing so, the venture team motivates community members to reconsider their own experiences and piece together a generalized view of the situation and problems in a bottom-up manner.

Macro-level validation of empathizing Distilling opportunities from observations, emotion-laden stories, and

descriptions of the situation in the community's voice can be formidable. In the words of a mentor, the venture team seemed "directionless and confused, but also emotionally charged" after conversations with community members. At this point, the venture team uses a variety of techniques such as personas and storyboarding to create "problem-potential solution" models based on the previous phases. A team member of Case 4 described this process as follows:

We first shorten the stories we heard to [their] capsule form—just retaining the main content that can inform the final solution and its connection with the problem. Next, we look at the emotions associated with the problems as people narrated their stories to us. The sentiments and emotions are like a guide. They help us identify triggers of problems and points of intervention. Sometimes, the emotional elements around pain points are subtle. We have to magnify them through discussion and reflection.

As the quote indicates, abridging narratives of community members helps the venture team create a heuristic model of the problem to be addressed. Identifying points at which emotions escalate paves the way for devising potential solutions to problems by pinpointing the triggers of current behavior. As a next step, the teams met stakeholders who hold influence over consumers' behavior in subsistence contexts and presented their identified problems and potential solutions. There was considerable diversity in the nature of these stakeholders among our respondents. They included local NGOs, religious institutions, public institutions such as schools and health centers, the local administration, merchants and retailers, and elected representatives.

The purpose of speaking with stakeholders was not just to validate ideas but also to ensure that the ventures' understanding was inclusive and encompassed diverse perspectives of the community. For example, the founder of Case 3 noted in initial visits to villages, of having missed out on interviewing migrant laborers who owned small parcels of farmland, because they were away during the season of the year when the visits were made. These migrant laborers tend to be excluded from the conventional finance system because of the lack of identification documents. The team later realized that these consumers could benefit the most from their mobile credit application, as long as a literate intermediary was involved. Without macro-level validation with local agricultural input retailers, this important source of opportunity would have been overlooked by the team.

Bottom-up interactional framing After the process of ideation within the team and visualizing potential reconfigured solutions, the ventures introduce them to members of the community who they consider potential early adopters or

opinion leaders. Before introduction, the team members spend a significant amount of time deciding on how the solution should be presented to the community members. In doing so, the solution is presented in its concrete form, focusing on its features, rather than explaining the rationale behind the addition of features or how the solution can benefit consumers. “We pare down the solution to its barebones, stripping it of all other explanations or the design logic,” one of the founders explained. The community members are then allowed time to reflect on the solution and think of its potential uses for them. In cases in which ventures designed a prototype (e.g., Cases 2 and 5), it is installed in select village households, and community members are encouraged to use it for a few weeks. After this initial introduction, team members go back to the community members to understand how they used the solution and why it could be useful to them. In effect, the ventures allow the community members to create meaning for the solution through their own experience and social interactions. This is akin to the process of interactional framing (Gray et al., 2015), which suggests that social interaction aids in constructing, reinterpreting, and transforming meanings through the process of framing. As one respondent explained, personal stories are essentially meanings that household members assign to the solution through their own experiences and through interaction with others in their household and neighborhood (Web Appendix, Table W5, quote #12). Venture team members interpret these subjectively constructed meanings and then introduce their own logic for designing the solution and how they intended it to be used. This is usually done with the assistance of community leaders who can help individuals understand the ventures’ frames in simple language. In one of the field visits, we observed the process of interactional framing among venture members, community members, and community leaders, as illustrated in the following discussion related to Case 3:

Farmer: It doesn’t feel like a loan. It is like advance payment given to the agricultural retailer. We already do that.

Team-member (Case 3): The idea is that the loan is now linked to the products. We will pay the full amount to the retailer, and you will pay it back to us after harvest.

Community leader: It is like borrowing from one and then paying back to another. And those two have some agreement between them that we don’t need to worry about.

The frames evolve through interactions sometimes sequentially focusing on the “what,” “how,” and “why.” In the first interaction, venture members and potential

consumers discuss what the solution does, without discussing the rationale behind the solution or how it can be useful. The second set of interactions involves how consumers intend to use the solution, and venture members explain how they intended the solution to be used. The final set of interactions deliberate on why the solution can be useful for the community in the short and long run.

Macro-level incorporation of framing Repeated conversations with the community on the “what–how–why” of the intended solution lead to the emergence of an interactionally framed meaning. The frames often differ between consumer groups within a village and across villages with different cultural and social environments. The venture team members then present these frames to mentors, business partners, and potential investors to obtain their opinions and feedback. Experts advise the team on the feasibility of solutions based on aspects such as market trends and climate, differentiation from existing products, resources and capabilities needed to implement the solution, and its long-term viability. In these meetings, team members enact the role of advocates of subsistence consumers, persuasively arguing in favor of each solution from a consumer-centric perspective and, at the same time, inviting experts to critique their arguments (Web Appendix, Table W5, quote #13).

We term this process of selecting solutions and infusing marketing acumen and logic into consumer-driven ideas as “incorporation.” In this stage, we found that teams make efforts to retain the voice of the consumer during the incorporation process. Cases 2, 4, and 5 identified “champion” consumers from the initial immersion stage, who the teams regularly consulted even as they were considering and incorporating experts’ feedback into the final solution. In some cases, the views of experts can be in direct conflict with the motivations behind the solutions presented to them. In such cases, champion consumers are necessary to triangulate feedback before arriving at consensus within the team. In another case, a team member who had spent the most amount of time with subsistence consumers during the previous two phases took on the consumers’ “voice,” as evident in the following quote:

Team member (Case 1): I had spent so much time with children, teachers, and parents that I had almost started thinking like a parent of a child going to a village primary school. I became the de facto customer specialist in the team. On one occasion, our mentor suggested that operating a call center is not financially feasible. I had to pitch in and say that for an illiterate parent who cannot read WhatsApp chats, talking to a real person is the only practical option.

Table 1 Implications of the bottom-up marketing approach for practice

General elements	Implications for practice
Why Convergence: vision for change Divergence: customized purpose	<ul style="list-style-type: none"> • Conduct sensemaking workshops to evolve shared vision of the identity orientation of the firm (“who we are”) and market/social innovation (“what we are here for”) • Conduct brainstorming to evolve purposes across geographies or marketplace distinctions, sharing macro vision/identity • Conduct periodic immersive meetings to revisit the purpose(s) to remain alert and adaptable to changes in ground realities
How Convergence: organic growth and evolution Divergence: grounded diffusion	<ul style="list-style-type: none"> • Evolve and organize field teams by highly localized marketplace distinctions (e.g., language, community, tribe) • Engender organic culture in teams by marketplace distinctions, including norms of autonomy, interaction, and communication • Co-evolve exploratory and emergent contextual implementation • Leverage stakeholder resources and partnerships with failure-tolerant logic and offerings with contextual understanding
What Convergence: baseline platform Divergence: re-creating social innovation	<ul style="list-style-type: none"> • Build a platform ecosystem: products, information, delivery, experiences • Design a core market/social innovation platform atomized to discrete firms • Re-create unique offerings on demand across geographies or marketplace distinctions (built on a single platform ecosystem)
Mindset shifts	Implications for practice
Embracing vs. avoiding unfamiliarity	<ul style="list-style-type: none"> • Provide deep context immersions for senior managers in unfamiliar contexts • Conduct localized, context-embedded design thinking workshops for project managers • Conduct unlearning and mindfulness bootcamps to unlock mental space boundaries
Exploring vs. exploiting	<ul style="list-style-type: none"> • Develop mentoring relationships for senior managers to encourage open and non-directional exploration through immersion • Conduct “discovery” workshops for creative expression and negotiating complexity • Form collaborations with academia and social enterprises to co-design time-intensive and non-directional exploratory projects
Co-evolving vs. collaborating	<ul style="list-style-type: none"> • Conduct “ideation” workshops with stakeholders with complementary vantage points; “mutualism” sessions at senior levels to de-emphasize instrumental win-wins • Conduct joint field visits to help identify convergent interests; break down processes and hierarchies – genuine co-adaptation barriers and limit co-evolution in instrumental collaboration; empower diverse stakeholders to provide insights for co-evolution
Perspective taking vs. premature narrowing	<ul style="list-style-type: none"> • Conduct “perspective” workshops when onboarding project staff (including follow-ups); broad immersion sessions for staff before embarking on specific deep dives • Expand diversity of stakeholder relationships to foster perspective-taking; “conceptualization” exercises to articulate problem and solution spaces
Interweaving	Implications for practice
Bottom-up immersion Macro-level synthesis	<ul style="list-style-type: none"> • Provide immersive learning experiences during onboarding (virtual/in-person); phased visits for teams to enable gradual perspective taking • Conduct workshops on iterating bottom-up and macro-level to generate insights; development of outcomes/assessments based on grounded insights • Interweave and aggregate ground-level learnings (e.g., counterproductive consumer behavior) and high-level understandings (e.g., literacy challenge) into a seamless middle ground (e.g., need for marketplace literacy)
Bottom-up deep empathizing Macro-level validation	<ul style="list-style-type: none"> • Conduct empathic revisits to share learnings and engage in deep listening as communities discuss satisfactions and contradictions; abridging narratives to distil opportunities • Develop models of problem–solution
Bottom-up interactional framing Macro-level incorporation	<ul style="list-style-type: none"> • Gather bottom-up responses to solutions or prototypes; understand what–how–why from potential users • Frame solution interactionally; develop interactional framed meaning of solution; seek input from top-down sources

And call centers are cheaper to operate than having a person on [the] ground.

For the mentors and other experts consulted by the teams, subsistence contexts are an unknown terrain. Continuing the process of interweaving the macro level with the bottom-up

frame helps balance business priorities with the ventures’ motivation to do good for society. Incorporation also serves as a stepping stone for ventures to finalize their business model and pitch it to potential investors for funding. Interweaving with the bottom-up at this stage helps them realize

multiple benefits, with both financial and social outcomes being critical.

Discussion

We explicate a bottom-up marketing approach that developed in the context of identifying and solving marketing problems of subsistence marketplaces by researchers, NGOs, and social enterprises. Nevertheless, the theoretical principles contained in this bottom-up marketing approach can make a useful contribution in virtually any marketing context. The typical marketing activity of identifying consumer needs by conducting market research and designing products and services based on those needs is driven by a firm's strategic priorities and bound by its resources and thus is top-down by nature. Recent trends have advocated infusing bottom-up elements within an overall top-down management process, such as crowdsourcing ideas through open innovation contests in the consumer community (Hofstetter et al., 2018) or having lead users co-create emergent product and service ideas (Lilien et al., 2002). The framework representing the bottom-up marketing approach can systematically advance the discipline.

At the same time, the strategic priorities of firms and policymakers cannot be neglected if a reimagined marketing framework for subsistence marketplaces is to have any practical value. Indeed, the rich stream of literature on base-of-the-pyramid marketing has significantly influenced businesses primarily because of its focus on the opportunities for profitability through market-based solutions for low-income markets (Dembek et al., 2019). The bottom-up framework, through its processes of immersion and emersion, helps ensure that managerial priorities are not sidelined in the efforts to remove inequities in subsistence marketplaces.

Marketing scholars have lamented that social marketing has been a major missing player in the global quest to find solutions for the grand challenge of poverty (Lee & Kotler, 2009). The bottom-up marketing approach we evolved herein (see Fig. 1 and 2) offers a transformational journey toward greater effectiveness and impact on both counts. The approach promotes a fundamental “inside-out” mindset shift, encouraging organizations to treat the marketplace as a set of discoverable original phenomena rather than as a context in which to apply or even customize their rules and tools, adopting the iterative steps depicted in Fig. 1 and 2. Implications for practice are presented in Table 1.

We demonstrated that customer-driven elements are embedded within a top-down approach and thus are not sufficiently bottom-up. Our bottom-up marketing approach provides a complementary counter-perspective, while also interweaving the macro level. In doing so, it addresses larger

issues that need a comprehensive view of social, institutional, and cultural elements of grand challenges at different levels of analysis and the interplay between these levels. In addition, it addresses immediate, concrete issues consumers face in their daily lives. As the primary discipline from which the stream of subsistence marketplaces has emerged, marketing can become a catalyzing “hub” to evolve and apply the bottom-up marketing approach, creating a bridge to sustainable development.

Supplementary Information The online version contains supplementary material available at <https://doi.org/10.1007/s11747-024-01022-z>.

Funding Open access funding provided by SCELCL, Statewide California Electronic Library Consortium.

Declarations

Competing interests The authors declare that they have no conflict of interest.

Open Access This article is licensed under a Creative Commons Attribution 4.0 International License, which permits use, sharing, adaptation, distribution and reproduction in any medium or format, as long as you give appropriate credit to the original author(s) and the source, provide a link to the Creative Commons licence, and indicate if changes were made. The images or other third party material in this article are included in the article's Creative Commons licence, unless indicated otherwise in a credit line to the material. If material is not included in the article's Creative Commons licence and your intended use is not permitted by statutory regulation or exceeds the permitted use, you will need to obtain permission directly from the copyright holder. To view a copy of this licence, visit <http://creativecommons.org/licenses/by/4.0/>.

References

- Achrol, R. S., & Kotler, P. (2012). Frontiers of the marketing paradigm in the third millennium. *Journal of the Academy of Marketing Science*, 40, 35–52.
- Anderson, S. J., Chintagunta, P., Germann, F., & Vilcassim, N. (2021). Do marketers matter for entrepreneurs? Evidence from a field experiment in Uganda. *Journal of Marketing*, 85(3), 78–96.
- Challagalla, G., Murtha, B. R., & Jaworski, B. (2014). Marketing doctrine: A principles-based approach to guiding marketing decision making in firms. *Journal of Marketing*, 78(4), 4–20.
- Chandy, R. K., Johar, G. V., Moorman, C., & Roberts, J. H. (2021). Better marketing for a better world. *Journal of Marketing*, 85(3), 1–9.
- Coviello, N. E., & Joseph, R. M. (2012). Creating major innovations with customers: Insights from small and young technology firms. *Journal of Marketing*, 76(6), 87–104.
- de Ruyter, K., Keeling, D. I., Plangger, K., Montecchi, M., Scott, M. L., & Dahl, D. W. (2022). Reimagining marketing strategy: Driving the debate on grand challenges. *Journal of the Academy of Marketing Science*, 50(1), 13–21.
- Deaton, A., & Dreze, J. (2009). Nutrition in India: Facts and interpretations. *Economic and Political Weekly*, 44(7), 42–65.
- Dembek, K., Sivasubramanian, N., & Chmielewski-Raimondo, D. (2019). A systematic review of the bottom/base of the pyramid literature: Cumulative evidence and future directions. *Journal of Business Ethics*, 165, 365–382.

- Deshpandé, R., Farley, J. U., & Webster, F. E., Jr. (1993). Corporate culture, customer orientation, and innovativeness in Japanese firms: A quadrad analysis. *Journal of Marketing*, 57(1), 23–37.
- DiMaggio, P. J., & Powell, W. W. (1991). *The new institutionalism in organizational analysis* (Vol. 17). University of Chicago Press.
- Eisenhardt, K. M. (1989). Building theories from case study research. *Academy of Management Review*, 14(4), 532–550.
- Fisher, G., Stevenson, R., Neubert, E., et al. (2020). Entrepreneurial hustle: Navigating uncertainty and enrolling venture stakeholders through urgent and unorthodox action. *Journal of Management Studies*, 57(5), 1002–1036.
- Follett, M. P. (1924). *Creative experience*. Longmans, Green and Company.
- Franke, N., Keinz, P., & Steger, C. J. (2009). Testing the value of customization: When do customers really prefer products tailored to their preferences? *Journal of Marketing*, 73(5), 103–121.
- Gau, R., Ramirez, E., Barua, M. E., & Gonzalez, R. (2014). Community-based initiatives and poverty alleviation in subsistence marketplaces. *Journal of Macromarketing*, 34(2), 160–170.
- Gimmon, E., & Levie, J. (2021). Early indicators of very long-term venture performance: A 20-year panel study. *Academy of Management Discoveries*, 7(2), 203–224.
- Gray, B., Purdy, J. M., & Ansari, S. (2015). From interactions to institutions: Microprocesses of framing and mechanisms for the structuring of institutional fields. *Academy of Management Review*, 40(1), 115–143.
- Hart, D. (2023). COVID times make ‘deep listening’ explicit: changing the space between interviewer and participant. *Qualitative Research*, 23(2), 306–322.
- Hart, S. L., & Christensen, C. M. (2002). The great leap: Driving innovation from the base of the pyramid. *Sloan Management Review*, 44, 51–56.
- Hill, R. P. (1991). Homeless women, special possessions, and the meaning of “home”: An ethnographic case study. *Journal of Consumer Research*, 18(3), 298–310.
- Ho, H., & Ganesan, S. (2013). Does knowledge base compatibility help or hurt knowledge sharing between suppliers in co-opetition? The role of customer participation. *Journal of Marketing*, 77(6), 91–107.
- Hofstetter, R., Zhang, J. Z., & Herrmann, A. (2018). Successive open innovation contests and incentives: Winner-take-all or multiple prizes? *Journal of Product Innovation Management*, 35(4), 492–517.
- Hosany, A. S., & Hamilton, R. W. (2023). Family responses to resource scarcity. *Journal of the Academy of Marketing Science*, 51(6), 1351–1381.
- Humphreys, A., & Grayson, K. (2008). The intersecting roles of consumer and producer: A critical perspective on co-production, co-creation and prosumption. *Sociology Compass*, 2(3), 963–980.
- Hunt, S. D., & Morgan, R. M. (1997). Resource-advantage theory: A snake swallowing its tail or a general theory of competition? *Journal of Marketing*, 61(4), 74–82.
- Kruglanski, A. W., & Webster, D. M. (1996). Motivated closing of the mind: “Seizing” and “freezing”. *Psychological Review*, 103(2), 263.
- Kyriakopoulos, K., & Moorman, C. (2004). Tradeoffs in marketing exploitation and exploration strategies: The overlooked role of market orientation. *International Journal of Research in Marketing*, 21(3), 219–240.
- Lee, N. R., & Kotler, P. (2009). Ending poverty: “What’s social marketing got to do with it?” *Social Marketing Quarterly*, 15(4), 134–140.
- Lefebvre, R. C. (2011). An integrative model for social marketing. *Journal of Social Marketing*, 1(1), 54–72.
- Lilien, G. L., Morrison, P. D., Searls, K., Sonnack, M., & Hippel, E. V. (2002). Performance assessment of the lead user idea-generation process for new product development. *Management Science*, 48(8), 1042–1059. <https://doi.org/10.1287/mnsc.48.8.1042.171>
- Maciel, A. F., & Fischer, E. (2020). Collaborative market driving: How peer firms can develop markets through collective action. *Journal of Marketing*, 84(5), 41–59.
- Madan, S., Johar, G. V., Berger, J., Chandon, P., Chandy, R., Hamilton, R., John, L. K., Labroo, A. A., Liu, P. J., Lynch, J. G. Jr., Mazar, N., Mead, N. L., Mittal, V., Moorman, C., Norton, M. I., Roberts, J., Soman, D., Viswanathan, M., & White, K. (2023). Reaching for rigor and relevance: better marketing research for a better world. *Marketing Letters*, 34, 1–12.
- Martin, J. (2001). *Organizational culture: Mapping the terrain*. Sage Publications.
- Martin, R. (2010). Design thinking: Achieving insights via the “knowledge funnel.” *Strategy & Leadership*, 38(2), 37–41.
- McCracken, G. (1988). *The long interview (qualitative research methods series, no. 13)*. Sage Publications.
- Mick, D. G. (2007). The end (s) of marketing and the neglect of moral responsibility by the American Marketing Association. *Journal of Public Policy & Marketing*, 26(2), 289–292.
- Nagaraj, V., Berente, N., Lyytinen, K., & Gaskin, J. (2020). Team design thinking, product innovativeness, and the moderating role of problem unfamiliarity. *Journal of Product Innovation Management*, 37(4), 297–323.
- Nenonen, S., Storbacka, K., & Windahl, C. (2019). Capabilities for market-shaping: Triggering and facilitating increased value creation. *Journal of the Academy of Marketing Science*, 47, 617–639.
- Prahalad, C. K. (2005). *The fortune at the bottom of the pyramid*. Wharton School Publishing.
- Quinn, R. E., & Rohrbaugh, J. (1983). A spatial model of effectiveness criteria: Towards a competing values approach to organizational analysis. *Management Science*, 29(3), 363–377.
- Radjou, N., & Prabhu, J. (2014). *Frugal innovation: How to do more with less*. Profile Books.
- Rivera-Santos, M., Rufin, C., & Kolk, A. (2012). Bridging the institutional divide: Partnerships in subsistence markets. *Journal of Business Research*, 65(12), 1721–1727.
- Schrodt, P. (2002). The relationship between organizational identification and organizational culture: Employee perceptions of culture and identification in a retail sales organization. *Communication Studies*, 53(2), 189–202.
- Sherry, J. F. (2007). Fielding ethnographic teams: strategy, implementation and evaluation. In *Handbook of Qualitative Research Methods in Marketing* (eds) Belk, R. W., Edward Elgar Publishing, Massachusetts, USA, (pp. 268–278) .
- Sheth, J. N. (2011). Impact of emerging markets on marketing: Rethinking existing perspectives and practices. *Journal of marketing*, 75(4), 166–182.
- Stout, M., & Love, J. M. (2015). *Integrative process: Follettian thinking from ontology to administration*. Process Century Press.
- Strauss, A., & Corbin, J. (1998). *Basics of qualitative research techniques. Techniques and Procedures for Developing Grounded Theory*. SAGE Publications.
- Viswanathan, M., & Rosa, J. (2007). Product and market development for subsistence marketplaces: Consumption and entrepreneurship beyond literacy and resource barriers. In J. Rosa, & M. Viswanathan (Eds.), *Product and market development for subsistence marketplaces: Consumption and entrepreneurship beyond literacy and resource barriers*, Advances in International Management Series, Joseph Cheng and Michael Hitt, Series Editors (1–17). Elsevier.

- Viswanathan, M. (2013). *Subsistence marketplaces.ebookpartnerships*.
- Viswanathan, M. (2016). *Bottom-up enterprise: Insights from subsistence marketplaces*. ebookpartnerships.
- Viswanathan, M., Rosa, J. A., & Harris, J. E. (2005). Decision making and coping of functionally illiterate consumers and some implications for marketing management. *Journal of Marketing*, 69(1), 15–31.
- Viswanathan, M., Rosa, J. A., & Ruth, J. A. (2010). Exchanges in marketing systems: The case of subsistence consumer–merchants in Chennai, India. *Journal of Marketing*, 74(3), 1–17.
- Viswanathan, M., Sridharan, S., Gau, R., & Ritchie, R. (2009). Designing marketplace literacy education in resource-constrained contexts: Implications for public policy and marketing. *Journal of Public Policy & Marketing*, 28(1), 85–94.
- Viswanathan, M., Sridharan, S., Ritchie, R., Venugopal, S., & Jung, K. (2012). Marketing interactions in subsistence marketplaces: A bottom-up approach to designing public policy. *Journal of Public Policy & Marketing*, 31(2), 159–177.
- Vomberg, A., Homburg, C., & Gwinner, O. (2020). Tolerating and managing failure: An organizational perspective on customer reacquisition management. *Journal of Marketing*, 84(5), 117–136.
- Viswanathan, M., Umashankar, N., Sreekumar, A. & Goreczny, A. (2021) Marketplace literacy as a pathway to a better world: Evidence from field experiments in low-access subsistence marketplaces. *Journal of Marketing*, 85(3), 113–129.
- Weick, K. E. (2006). 5 managing the unexpected: Complexity as distributed sensemaking. In *Uncertainty and surprise in complex systems: Question on working with the unexpected* (pp. 51–65). Springer.
- Wilkie, W. L., & Moore, E. S. (2003). Scholarly research in marketing: Exploring the “4 eras” of thought development. *Journal of Public Policy & Marketing*, 22(2), 116–146.
- Williamson, P. J. (2010). Cost innovation: preparing for a ‘value-for-money’ revolution. *Long Range Planning*, 43(2-3), 343–353.
- Woolcock, M., & Narayan, D. (2000). Social capital: Implications for development, theory, and policy. *World Bank Research Observer*, 15, 225–249.

Publisher's Note Springer Nature remains neutral with regard to jurisdictional claims in published maps and institutional affiliations.