

# **At the Intersection of Politics & Consumption: A Research Agenda for Investigating the Effects of Fair-Trade Marketing Claims on Ethical Shopping Behavior**

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*Despite the mainstreaming of fair-trade products and the increasingly routine presence of fair-trade certifications on consumer goods, relatively little is known about the true ability of fair-trade marketing claims to influence consumer purchases or impact brands. While a number of large companies have stepped forward to alter their procurement or production processes to claim fair-trade status for their brands, there has been little significant academic research to validate these decisions. This paper details a pragmatic research agenda designed to assess the effectiveness of fair trade marketing claims on consumer behavior and long-term brand equity.*

## **INTRODUCTION**

The purchase of fair trade-labeled products has increased dramatically in the United States over the past half decade. According to the Fair Trade Federation (the trade association that “strengthens and promotes fair trade in North America”), sales of fair trade products surpassed the four billion dollar mark in 2009 and more than doubled (102% growth) in the United States and Canada since 2005 (<http://www.fairtradefederation.org>). The sales expansion is attributed to increased product mainstreaming, (more widespread distribution penetration in traditional retail outlets) and the increased presence of labels (Doran, 2009). Fair trade products have moved beyond the limited realm of niche markets that existed when the movement first began and are now extensively available in mainstream shopping venues like supermarkets and big-box chain stores. Fair Trade USA, the leading third-party certifier of fair-trade products in the United States, states that as of April 2011, there are 9,500 Fair Trade Certified™ consumer products offered by approximately 700 industry partners at more than 60,000 retail locations in the United States (<http://www.fairtradeusa.org>). These latter statistics signal that fair trade consumption has been stimulated by the proliferation of non-governmental (NGO) labeling and certification programs that help consumers recognize and identify fair-trade products. The two most prominent NGOs that certify fair trade goods sold in the United States are Fair Trade USA and the Fair Trade Federation (see above for URLs).

To date, a few very large mainstream companies including Nestle, McDonald’s, Starbucks, and Whole Foods have experimented with fair-trade labeling and marketing initiatives (Davies, 2007). But what will be the result of these initiatives? Recent qualitative evidence suggests a growing number of consumers perceive that corporations embrace fair trade ideology in their procurement and production activities for profit motives and capitalistic ends rather than out of any true sense of corporate social responsibility (Hamilton, 2008; Botterill & Klein, 2007). Ideologues fear that if fair trade becomes tantamount to nothing more than a business strategy, the movement will stall. Thus, changing consumer

attitudes have raised questions about the effectiveness of the strategy when applied on a large-scale commercial basis (Pharr, 2010; De Pelsmacker & Janssens, 2007). This raises several questions: Can the increased availability of fair trade products from mainstream companies cause backlash among ethical shoppers? If so, what kind of long-term brand effects can companies who promote and/or sell their products using fair trade claims expect to achieve? Can fair trade marketing produce sufficient sales and brand equity to warrant adopting the practice as a comprehensive marketing strategy?

As the popularity of fair-trade-labeled products grows, questions like these need to be systematically addressed. This paper outlines a three-step research agenda for generating empirical data to help bridge the gap in knowledge concerning the brand effects of fair trade marketing. The paper reviews the extant literature and offers a pragmatic research program based on the unique nature of the fair trade movement as a dual issue of corporate social responsibility versus profitable business strategy. The paper is intended to foster a more comprehensive theory of ethical marketing.

## BACKGROUND ON THE FAIR TRADE MOVEMENT

*Ethical shopping* is the term used to denote the practice by consumers of including moral, societal, or environmental factors in everyday purchase decisions. Brinkman (2004) describes ethical shopping in this manner:

“Every day we choose between different products. Our purchase decisions do not only affect us ourselves; the way the products have been produced can make a big difference to other people, to nature, the environment, and to animals. Ethical purchasing is about taking responsibility for the influence we ourselves wield through our buying choices.”  
(Brinkman, 2004, p. 129)

Thus ethical shopping invites consumers to consider how other natural entities are affected by both the production and consumption of products and take personal moral responsibility for the consequences of their buying behavior with regard to these products.

Although ethical shopping can encompass choices surrounding green or environmentally friendly products, organic and natural products, products that have not been tested on animals or that avoid animal cruelty, and vegan products, it has come to be associated primarily with products that are made by people whose human rights as workers are protected (Brinkman, 2004). Companies that make (or sell) fair trade goods must ensure that they and their suppliers meet certain production goals and standards for workers. Among these goals are:

- Employment is freely chosen and not coerced
- The right to organize and bargain collectively is respected
- No child labor is used
- No harsh or inhumane treatment is practiced
- Safe and hygienic working conditions are ensured
- Working hours and production shifts are not excessive
- Regular, reliable, and living wages are paid
- No discrimination is practiced

Given these goals, ethical shopping has also been called “shopping for human rights” (Micheletti, et. al., 2007). It is more specifically associated with avoiding products whose manufacture disregards human rights than are the other forms of ethical consumption like veganism, green shopping, or organic shopping (Wilkinson, 2007).

It is important to note here that fair trade consumption is but one form of *political consumerism*. Political consumerism is a broad social movement (Wilkinson, 2007) defined as “actions by people when

making choices among producers and products with the goal of changing objectionable institutional or market practices” (Micheletti, et. al., 2007). Several different quasi-political instruments have been developed to galvanize the fair trade movement. These include product labeling and certification programs, corporate codes of conduct, voluntary production standards, deliberative democratic initiatives such as citizen juries, consensus conferences, and neighborhood councils (Klintman, 2009), alternative business and trade systems (Davies, 2007), social alliances, “boycotts” and boycotts, and shareholder activism (Bakker, et. al., 2008). Instruments like these permit consumers to more easily identify fair trade products and practice ethical consumption.

Despite these convergent impetuses to fair trade, the issue of brand-building via fair trade marketing is embryonic. As yet, there is little significant academic research examining the long-term organizational or product effects of fair trade marketing programs. While marketers seem anxious to discover the extent to which fair trade claims can be used to promote or enhance brands (De Pelsmacker & Janssens, 2007), empirical research is sorely needed. The following agenda outlines some basic steps necessary for investigating whether and to what extent fair trade marketing can be purposefully employed to impact consumer behavior and brand viability.

### **STEP 1—DESCRIBE AND PROFILE THE FAIR-TRADE CONSUMER**

A comprehensive theory of ethical shopping should be grounded in reliable information about the fair trade consumer; unfortunately, data on fair trade enthusiasts in the United States is sparse. In particular, little is known about what motivates fair trade consumption or whether demographic data can significantly contribute to a meaningful profile of ethical shoppers. In Europe, where the fair trade movement is considerably more mature and institutionalized, demographic research is equivocal. Numerous studies have yielded no consistent demographic characteristic other than education level with the ability to discriminate between fair trade and non-fair-trade buyers (Wilkinson, 2007). In one of the few studies to focus on American shoppers, age, gender, marital status, race, and even education level were unable to significantly explain variance in patterns of fair trade consumption (Doran, 2009).

To probe more deeply, personal values were also examined. Using the 10-category Schwartz Value Survey (SVS)<sup>1</sup>, researchers found that more frequent and committed ethical shoppers were singularly controlled by *Universalism*<sup>2</sup> while less loyal ethical shoppers were multifaceted. The latter group displayed significantly different levels of *Benevolence*,<sup>3</sup> *Achievement*,<sup>4</sup> and *Self-direction*<sup>5</sup> than the most loyal ethical shoppers. *Power*<sup>6</sup> values were the least important in explaining ethical shopping in either group. These findings suggest loyal ethical shoppers have a more holistic worldview than do intermittent ethical shoppers who exhibit greater in-group (e.g. family) loyalty and less universal social concern.

Research uncovering such discriminant values of loyal ethical shoppers suggests other psychographic variables like motives, opinions, interests, attitudes, and lifestyles may hold special significance in explaining why people engage in fair trade consumption. A more comprehensive theory of ethical marketing could be advanced if researchers were to better understand and document what deeply held beliefs or attitudes motivate individuals to participate in fair trade consumption.

### **STEP 2—IDENTIFY MOTIVES AND OTHER ANTECEDENT STATES OF FAIR-TRADE CONSUMERS**

The key to understanding ethical shoppers may lie in understanding *why* individuals seek out fair trade goods in the first place. So, what factors do indeed seem to motivate consumers to purchase fair trade-labeled products? Preliminary research indicates environmental as well as personal variables may be at play in drawing individuals to fair trade goods.

Cross-cultural researchers have recently demonstrated the importance of national environmental factors in explaining differences in the way individuals assume various roles and responsibilities as ethical shoppers (Jacobsen et. al., 2007). In countries where political consumerism had advanced from a grassroots effort to a more organized and cohesive movement, people were more likely to attribute moral

significance to their everyday purchases and be more committed to ethical shopping (Kjaernes et. al., 2007). Similar research confirmed a link between the number of NGO fair trade institutions present in a country and the extent to which consumers in that country said they were interested in and motivated to buy fair trade products (Hartlieb & Jones, 2009). Empirical data has also correlated individuals' rates of media usage and media exposure with participation in social movements like political consumerism. For example, Shah et. al. (2007) found respondents' desire and intent to express political concerns through consumer behavior significantly higher as their rates of both conventional and online news use increased. Altogether these findings imply ethical shopping behavior can be conditioned and is somewhat predicated upon information availability and the salience of the issue within the public realm.

As shopping choices become increasingly subjected to moralization, political motivation may hold promise as an important variable in explaining why individuals partake in fair trade consumption (Micheletti, et al., 2007). Jacobsen et. al. (2007) argues that the increasing attribution of moral significance to the choice of everyday consumer goods has not only moralized but also *politicized* the act of shopping. Through “voting” at the checkout, consumers are able to make political statements. When people refuse to purchase (i.e. “buycott”) a certain good, corporations are held accountable for their choices and personal consumption becomes an exercise in political statement-making (Halkier and Holm, 2008). This implies the political leanings of individuals should be studied in conjunction with their consumption patterns.

Pharr (2008) contends that political affiliation may well be the key to predicting how consumers in the United States feel toward fair trade. Since previous research has shown conservatives and liberals appear to differ in the ways they *conceptualize* morality (Haidt & Graham, 2007), Pharr argues that different notions of what it means to “act morally” lead to differences in moral judgments. Issues that conservatives view as moral topics (e.g. gay marriage), liberals see as amoral and overly politicized, and issues that liberals view as moral topics (e.g. free trade) conservatives see as amoral and overly politicized. Moreover, problem solutions seen as morally expedient by one group (e.g. free trade promotes human rights; the choice of marriage partner is an autonomous human right) are perceived as immoral by the other (e.g. free trade exacerbates and perpetuates social and economic injustice; gay marriage undermines society). Pharr (2008) further demonstrates how “religiosity” (as measured by the frequency of church attendance) can serve as a surrogate measure of political affiliation and is superior to the more common measure of religious denomination in predicting how individuals view fair trade.

Table 1 summarizes the discussion of these variables and their predicted association with fair trade consumption.

**TABLE 1**  
**VARIABLES AND THEIR HYPOTHESIZED RELATIONSHIP TO FAIR TRADE CONSUMPTION**

<b>VARIABLE</b>	<b>CORRELATION WITH FAIR TRADE CONSUMPTION</b>	<b>PREDICTED ASSOCIATION</b>
Personal Values	Significant	+
Media Usage	Significant	+
Nationality	Significant	+
Political Affiliation	Significant	+
Religiosity	Significant	+
Demographics	Non-Significant	-

In the United States, where fair trade initiatives are just beginning to more widely diffuse, marketers need to better gauge the ability of psychographic and other lifestyle variables such as media usage, political affiliation, and religiosity to distinguish ethical consumers from shoppers that display no ethical concerns. Increased study of the link between moral worldview and participation in political consumerism

acts such as ethical shopping will also help to ascertain whether the fair trade movement holds promise in North America as a tool of public policy and social change.

### **STEP 3—INCREASE CONTROLLED STUDIES OF HIERARCHICAL BRAND EFFECTS AND MEDIATORS**

A more thorough understanding of the factors influencing buying behavior with respect to fair trade products and the structure of the buying process is necessary. Studies of ethical consumption in general, and fair trade buying behavior in particular, are often implicitly or explicitly embedded in models of reasoned action or planned behavior. Consequently, these models emphasize constructs such as knowledge, attitudes, and buying intentions and seek to relate them to independent ethical marketing practices. Unfortunately, few to no studies have directly assessed the effects of fair trade claims on buying constructs such as brand attitudes or purchase intentions. In addition, few studies have examined the ability of extraneous marketing factors such as product type, price, or corporate image to mediate the effects of fair trade claims on buying behavior or related structural constructs such as brand attitude.

Both *push* and *pull* market dynamics are at work in the fair trade movement and may relate differently to ultimate buying behavior in ethical shoppers. Push is evidenced in the actions of producers, their supply chain partners, and licensing organizations to avail end users of goods that meet fair trade standards. Pull is evidenced when end users demand fair trade products from the producers and retailers with whom they trade. At issue is the relative efficacy of each of these market dynamics in fostering purchase intentions. Micheletti and Follesdal (2007) question whether consumer pull is a “fair weather option” that loses its appeal in economic downturns when consumers are financially pressed and find it harder to take the moral high road. Recent statistics lend credence to this argument. A large-scale trade study of food shopping conducted in the United Kingdom reports that fewer than one in five British shoppers buy ethical products no matter the cost (*The Grocer*, 2008). The top three reasons given by intermittent ethical shoppers—who comprise the overwhelming majority of British consumers—for their sporadic behavior were (in order of importance): (1) high price, (2) lack of availability, and (3) lack of trust in the product.

As intermittent ethical shopping becomes more widespread, researchers wonder whether economic and functional criteria will mediate personal ethics when making purchase decisions (Hartlieb et al., 2009). Shoppers’ concerns with the price and availability of fair-trade labeled products signal this potential eventuality. Meanwhile, the recent tendency among corporations to “self certify” their products as fair trade has led shoppers to question the integrity of increasing numbers of fair-trade-labeled products (Micheletti, et. al., 2007). A recent study found that as many as two-thirds of Americans already suspect some companies merely pretend to be ethical because of the effect of corporate social responsibility claims on brand image (*Strategic Direction*, 2007). Consequently, researchers must concern themselves with the effects of labeling on brand attitudes and purchase intentions as ethical certifications proliferate and compete for buyers’ consideration amongst other product factors like price and quality. Recent labeling research suggests fair trade claims become another “utility” among brand traits as the number of certified products increases (Hartlieb, et.al., 2009) and that the nature of the product itself has an impact on the efficacy of a fair trade claim. For example, price, quality, and style carried much greater weight in apparel purchases than did either country-of-origin information or fair-trade-label claims (Iwanow, et.al., 2005) although this finding could not be generalized to products without a style dimension, such as food products like coffee.

The mainstreaming of fair trade-labeled products may also moderate the effectiveness of ethical claims to positively influence brand attitudes and purchase intentions for these products. Some hard-core activists think mainstreaming has largely transformed fair trade from an ideological alternative movement to a market-based competitive approach (Micheletti, et.al., 2007). Qualitative data from various case studies suggests corporations embrace fair trade practices in pursuit of profit impact rather than out of any genuine concern for social responsibility (Hamilton, 2008; Botterill & Klein, 2007). Consequently, serious fair trade activists (who can be distinguished from more casual fair trade consumers) increasingly

believe action must be regulatory rather than voluntary (Tormey, 2007). Hardliners advocate international laws that incorporate human rights obligations be applied directly to businesses and corporations in all aspects of sourcing, production, and trade. Only then will they purchase products from certified fair-trade producers or sellers. Other research (Wilkinson, 2007) confirms a growing contingent within the Fair Trade movement that believes human rights abuses are problems that transcend market solutions. This group advocates a new kind of push, one that comes from governments instead of private producers or citizens. Consequently, research is needed to determine how the various instruments of political consumerism differ in effectiveness or may moderate purchase as the movement progresses and changes.

Aside from the effects of market dynamics on buying behavior, little is known of the effects of fair trade claims on the brand. A number of questions proliferate in this area alone. What empirical evidence is there that fair-trade marketing claims can be used to effectively build a brand? In what ways does fair trade marketing lend itself to the brand building process? Does fair trade marketing hold any unique branding abilities that recommend it beyond other forms of ethical marketing (e.g. green marketing)? Are certain products or product categories better suited to fair trade marketing than others? What is the best model and set of measures for recording and assessing the branding power of fair trade marketing? Researchers must move beyond descriptive studies of ethical shoppers and measure the ability of fair trade marketing claims to produce hierarchical brand effects under controlled experimental conditions. It is only by advancing the level and rigor of study taking place in the field that marketers can hope to achieve a more comprehensive theory of ethical marketing.

## **SUMMARY AND CONCLUSIONS**

While concerns about fair trade have been around for decades in both the United States and Europe (Botterill & Klein, 2007), empirical evidence suggests the fair trade movement is more mature and institutionalized in Europe than in the U.S. (Wilkinson, 2007). And, despite the mainstreaming of fair-trade products and the increasingly routine presence of fair-trade certifications on consumer goods, relatively little is known about the true ability of fair-trade marketing claims to influence consumer purchases or impact brands. While a number of large companies have stepped forward to alter their procurement or production processes to claim fair trade status for their brands, there has been little significant academic research to validate these decisions. This paper details a pragmatic research agenda designed to assess the effectiveness of fair trade marketing claims on consumer behavior and long-term brand equity.

First, additional research is needed to develop the profile of ethical shoppers and supply information on the demographics, lifestyles, and values of individuals who engage in fair trade consumption. To date, little research on the American fair trade consumer has been conducted, although recent study (Doran, 2009) indicates the loyal and committed ethical shopper in the United States can be distinguished by her universal and holistic (out-group) values rather than by more traditional benevolent (in-group) values or any consistent demographic profile. Second, because buyers' motives and other antecedent states (like residing in a country where the fair trade movement is more institutionalized) have the potential to moderate the effectiveness of fair trade marketing claims, researchers must understand what prompts individuals to buy and/or consume fair trade-labeled products as well as what discourages them from doing so. Psychographic measures such as values, moral worldviews, and religiosity show promise in helping to ascertain the basis for motivation. Additional research is needed to determine the extent to which media usage, political affiliation, and religiosity distinguish ethical consumers from shoppers that display no ethical concerns, especially since all these variables have been linked by previous research to involvement in political consumerism.

Finally, as the Fair Trade movement evolves in the United States and becomes more mainstream, as evident in the growing number of fair-trade-labeled products and retailers that carry them, more rigorous study of the consumer's commitment to ethical shopping and the extent to which this loyalty can be mediated by economic and functional product factors like price, quality, and availability is needed. More widespread but less intense levels of personal commitment to ethical shopping are apparent in Europe as

the movement has mainstreamed and splintered into various factions. European shoppers now say that price is the single biggest reason they don't buy ethical products more often or consistently over non-fair-trade-labeled brands. To advance the field, researchers must move beyond descriptive studies to controlled experimental designs that test the ability of fair trade marketing claims to affect brand awareness, attitudinal change, purchase intentions, and, ultimately, purchase in the real world. This critical information will not only contribute significantly to a more comprehensive theory of ethical marketing but will help practitioners develop actionable strategies that properly capitalize on the qualities of the fair trade movement that make it so appealing to certain consumers.

## ENDNOTES

[1] The 10 SVS values are *Achievement, Benevolence, Conformity, Hedonism, Power, Tradition, Security, Self-direction, Stimulation, and Universalism.*

[2] *Universalism* was comprised of the value of inner harmony, broadminded equality, protecting the environment, social justice, unity with nature, wisdom, a peaceful world, and a world of beauty.

[3] The *Benevolence* values are forgiving, helpful, honest, loyal, responsible, mature love, true friendship, and meaning in life.

[4] The *Achievement* values are ambitious, influential, capable, successful, and intelligent.

[5] The *Self-direction* values are freedom, creativity, independent, choosing one's own goals, and self-respect.

[6] *Power* was comprised of the value of social status, wealth, authority, social recognition, and public image.

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