



# HANDBOOK OF Qualitative Research Methods in Marketing

Edited by  
**Russell W. Belk • Cele Otnes**

**SECOND EDITION**



# HANDBOOK OF QUALITATIVE RESEARCH METHODS IN MARKETING

*This book is dedicated to our students – past, present and future.*

# **Handbook of Qualitative Research Methods in Marketing**

**SECOND EDITION**

*Edited by*

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## Introduction

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This is a completely new edition of the well-received original *Handbook*, which was published in 2006. Only one chapter carries over that is nearly intact from the first edition. The remaining chapters are evenly divided between thoroughly revised chapters and entirely new chapters. One reason for this revamp is the fact that qualitative research methods have changed substantially in the past two decades, thanks largely to dramatic developments in technology. The other reason for so much new content is that the first edition neglected to provide an entry ramp for those who are new to qualitative research. In this edition, the first seven chapters are devoted to *getting started*. The next eight chapters lay out different *paradigms* from which qualitative research in marketing might be conducted. The next twelve chapters present different *qualitative methods* in detail. We follow this with six chapters detailing different *applications* of these methods in practice. And we close with eight chapters on the *tactics* that can be employed in gathering, analyzing, presenting and writing up qualitative research. As a result, we believe we have achieved our goal of covering each stage of qualitative research thoroughly. Thanks to an impressive cadre of the world's leading scholars in qualitative research, we offer innovative methods and perspectives for the reader to ponder and enjoy.

*Data collection methods* in the *Handbook* now include diary methods, archival data, ethnmethodology, netnography, videography, depth interviews, autoethnography, projectives, ZMET, automated textual data collection, observation, and the use of team research. Special *paradigms* discussed include participatory action research (PAR), feminist studies, literary analysis, historical research and visual analysis. *Contexts and consumers* requiring new perspectives and methods that are outlined include vulnerable consumers, posthuman consumers, nonhuman actants, the metaverse, advertising effects, brands, innovations and services. The volume gives special consideration to issues pertaining to diversity, equity and inclusion (DEI), theory-building, reflexivity, ethics, critical visual analysis and crisis contexts. Experts also illuminate issues such as the use of coding software, assuring research rigor, managing field notes, conducting multi-sited ethnographies and writing up and presenting qualitative research.

Together, these chapters show a breadth of qualitative data collection and analysis methods, contexts and topics, as well as a depth in providing insightful, impactful and theoretically meaningful qualitative research in consumer and marketing contexts. Because of its comprehensiveness, innovativeness and breadth, we believe the *Handbook* will also prove useful in non-marketing contexts and fields. To that end, the methods discussed here leverage the digital revolution in terms of data gathering, analysis and presentation. The chapters also show how we can study consumers' digital activity involving artificial intelligence (AI), virtual reality (VR), augmented reality (AR), gaming, smart devices and virtual worlds. The result, we are pleased to note, is a very up-to-date and forward-looking *Handbook*.

Whereas a qualitative researcher once entered the field with little more than a pencil and notepad, contemporary researchers – and research participants as well – are likely to carry smartphones or other smart devices. This means the researcher likely carries a sound recorder, a camera, a video recording device, a display screen with which to show stimuli for visual elicitation and a communication device with which to ask participants to capture and send us

still photos, videos and elements of their social media. We can ask them to search the internet for images and create a visual collage to send us. We can conduct remote interviews anywhere in the world; we can conduct virtual focus groups; and we can use the same device to code our data, engage in systematic analysis and prepare a textual or visual presentation, including a broadcast-quality film. Nowadays, we can even invoke generative AI at various stages along the way. But despite the possibilities stemming from using such technological affordances, the quality and insightfulness of the research still depends on the prepared mind of the researcher. We hope the *Handbook* will prove useful in nurturing the use of both the latest technological possibilities and the basic human inquisitiveness and insightfulness that has long been the bedrock of qualitative consumer and marketing research. We thank our contributors profusely for providing such intriguing and insightful content, and look forward to hearing about how their chapters spurred projects of use to academics and practitioners in marketing – and beyond.

*Russell W. Belk, Keswick, Ontario, Canada  
Cele Otnes, Urbana, Illinois*



## PART I

# GETTING STARTED

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# 1. From a blank piece of paper: starting a research project

*Tonya Williams Bradford and Mary C. Gilly*

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## INTRODUCTION

Any research project starts with a phenomenon. What are you curious about? Are there consumer behaviors, management decisions or public policy choices that you want to know more about? Do you see something that inspires you to figure out how it happens, or why? No matter what piques your research interest, qualitative research plays an integral role in understanding and explaining consumer behavior and marketplace activity.

This chapter offers a blueprint for scholars to follow when starting a qualitative research project. We start with choosing a phenomenon and identifying possible sources of data and data collection processes. We then discuss moving from phenomenon to research questions that will guide the research. Human subjects research requires Institutional Review Board (IRB) approval, which includes protection of those human subjects. Finally, we consider starting the work and overcoming any obstacles to launching a qualitative research project.

## WHAT WILL YOU STUDY? CHOOSING A PHENOMENON

Given that the research process (from idea inception to ultimate publication) takes years, it is important that you choose to study a phenomenon that truly interests and excites you. As MacInnis et al. (2020) state in their article on boundary-breaking consumer research, ‘current consumer research is often inspired by existing academic literature’ (1) rather than real-world phenomena. Though the literature can certainly inspire research ideas, it is always worthwhile to explore what is happening around you for inspiration. One of the advantages of qualitative research is that it need not be designed to fill a gap in the literature. For example, Arnould and Price (1993), in their article on extraordinary experiences state, ‘The story we tell is emergent. We did not find it in the literature, but we can document theory and research that support the importance and plausibility of our account’ (25).

How do you find the right phenomenon to study? It helps to read widely, both the academic literature and the popular press. This will aid in understanding what is known and assist in identifying opportunities to extend and expand upon what is theorized. When assessing what is happening around you, consider what is taking place and how it relates to markets or consumption. For example, the twenty-first century ushered in numerous technological innovations. Qualitative research has examined changes in how consumers share information (Kozinets, 1999), mobilize (Bradford, 2021), interact with brands (Russell and Schau, 2014), or engage one another (Ertimur and Gilly, 2012). Such research creates additional opportunities for scholars to consider the various relationships between consumers adapting to and

adopting technology, managerial considerations related to technological investments to reach consumers, and policy implications related to consumer protections.

Reading widely and observing, as the technology example illustrates, are rich avenues for identifying phenomena. Additional fruitful approaches for inspiration include talking to people in other academic areas, observing behavior as you go about being a consumer, and watching consumer and management behavior portrayed in the media. Be sure to keep something handy to jot down research ideas – anything that makes you say, ‘hmmm’.

The choice of a phenomenon may be made easier given your area of expertise or relative ease of access to a context for research. This is especially important for more junior researchers who will want to consider what expertise or qualification they have that other researchers do not. Be sure to consider your unique experiences, skills or talents – those capacities that may allow you to bring novel insights to your scholarship. For example, Akaka and Schau (2019) used a surfing context to study consumption journeys because their experience as surfers enabled them to contact surfers and credibly discuss surfing with them. One of the co-authors in Cross and Gilly (2014) is herself in a binational family, providing personal experience and contacts for their study of spousal influence in binational families’ decision-making. Arnould and Price (1993) decided to study extraordinary experience in the context of river rafting when one of them ‘had a memorable experience with rafting that left an impression that satisfaction ... is complex. How could so many awful things add up to a positive experience?’ (28).

Regardless of how the inspiration for a phenomenon to study comes to you, it is just the beginning of a research process. You will spend a lot of time thinking about the phenomenon, so choose something that will continue to interest you over the research and writing process.

## WORKING SOLO OR WITH COLLABORATORS?

Employing qualitative methods can certainly be an individual effort. However, there are often reasons to seek collaborators. For example, you may identify a phenomenon that is of great interest, but one where you may not have the tools needed to successfully complete the project on your own. Most academic research involves collaborators, because of the complexity of the work and the value of having another perspective on the data. Working with collaborators is often something senior scholars mention as the most rewarding and enjoyable part of their research careers.

Selecting collaborators is something that should be thoughtfully considered. Workstyles, partnership preferences, project management approaches and even where the project is on others’ priority lists should be thought through. It is important to conduct a personal assessment of your own approach to research so you can honestly share it with potential collaborators. This insight will also assist with identifying what is needed from a collaborator. Once you understand what is needed for the project, you can begin identifying potential partners.

Identifying possible collaborators can be accomplished in various ways. For example, you can consider those individuals who work in a related theoretical area or who have studied similar phenomena. There may be someone who has access to a context that would expedite the start of data collection. When thinking about the research, you may recognize that another individual may have skills that would complement your own. Or it could be that you get along well with someone and you decide you want to work on a project together. Whatever the criteria, be clear about who will do what work within the collaboration. In addition, deciding

authorship is an important discussion that may influence what work is being done, as well as how much each author is contributing. Having these conversations early can make for less conflict later in the project. Without a doubt, when chosen with careful consideration, collaborators make projects more enjoyable, while also contributing perspective, time, intellect or access. It is important for junior scholars to consider that, when reviewed for tenure, they may need to demonstrate they have assumed leadership roles in their research. Collaborating with peers or doctoral students will assure reviewers of that leadership, while only having senior collaborators may be seen as problematic.

There are certainly efficiencies gained after the first collaboration that may make it possible to pursue additional projects. This is most often possible when collaborators have a clear understanding of how they will work together and what they wish to accomplish. As with any relationship, open communication is imperative.

## CONTEXT AND PHENOMENA: ORDER DOESN'T MATTER

Context is a specific instance in which a phenomenon takes place. Phenomena can manifest in various ways, with the possibility of multiple research projects emerging from one study. The qualitative researcher may observe various relationships within a specific context. For example, consider tailgating, a social activity prior to a sporting contest, as a phenomenon. Bradford and Sherry (2015) examine this phenomenon within the context of one university's tailgating traditions to theorize placemaking rituals, and how such rituals influence experiences of brand community (Bradford and Sherry, 2018). Within the same context, they also develop a more nuanced understanding of temporal dimensions of rituals (Bradford and Sherry, in press). Further, the co-authors explore the ways ritual artifacts shape behaviors within rituals (Bradford and Sherry, 2017). When considering a specific context, be sure it offers enough depth and breadth – participants, interactions, occurrences – so the research has a chance to develop. That is not to say particular events are not of interest, although focusing on a one-time-event may be more challenging for researchers when it comes to amassing data, than when a context offers continuity or repeat occurrences.

You might begin with a familiar context, perhaps one in which you have been an active participant (and therefore have some expertise). In that context, you may observe an interesting phenomenon, as was true when Arnould and Price (1993) noted that satisfaction with the river rafting experience did not fit what was known about consumer satisfaction in other contexts. Alternatively, you may begin by observing a phenomenon and then consider an appropriate context for studying it. For example, Cross and Gilly (2017) wanted to study binational households and family decision-making and decided to use Thanksgiving as the context to determine how the traditional meal was negotiated between the American and non-American spouse, and modified to meet the needs of both.

Table 1.1 offers examples from the literature of research on the dimensions of phenomenon/context/theorizing topics where the order in which these emerged did not matter. So, whether you begin with a phenomenon and move to context or vice versa, the next step is to determine the research questions you intend to address with your study.

*Table 1.1 Examples of phenomenon/context/theorizing topics*

Phenomenon	Context	Theorizing Topics
Wellness	Weight loss	Compliance (Dellande et al., 2004) Social support (Bradford et al., 2017)
Spending	Monetary choices	Mental budgets (Bradford, 2009, 2015) Credit and debt (Bernthal et al., 2005; Dellande and Saporschenko, 2004; Peñaloza and Barnhart, 2011) Unintended value transfers (Campbell and Schau, 2019)
Identity regeneration	Retirement	Identity invigoration (Schau et al., 2009) Identity projection and trial (Weinberger et al., 2017)

## MOVING FROM PHENOMENON TO RESEARCH QUESTIONS

Once you identify the phenomenon of interest, it makes sense to engage in exploratory data collection. This activity will help to refine the area of focus and its importance. For example, in addition to the experience of river rafting, Arnould and Price (1993) had ‘serendipitous conversations with an outfitter’ that provided them an entrée to conduct their research, and insight into the ways river rafting is an ‘extraordinary experience’, unlike other more mundane services.

At this stage, engaging with the literature helps identify what we already know about the phenomenon and what is left to be explained. It may be that the literature explains the phenomenon in a way that doesn’t make sense, given your observations. In the Arnould and Price (1993) paper, the literature purported that a service transaction needs to meet or exceed consumer expectations. But the authors find that, in river rafting, consumers didn’t know what to expect, and when aspects of the experience went wrong, these were often the most memorable parts of the experience. Similarly, Cross and Gilly (2014) find that the literature on family decision-making focused on the division of labor by gender in different categories (e.g. financial decisions or choosing children’s schools). Being in a binational family, this did not fit Cross’s experience. They find instead that whichever spouse possessed the cultural capital to understand the purchase situation dominated the decision. Finding a phenomenon at odds with the existing body of knowledge is an opportunity to make a contribution with qualitative research.

Knowing your target journal will help you to shape your research questions. It is useful to start with the end goal in mind – what contribution do you intend to make? Answering this question will impact what journal or journals you target for submission of your work. Some require that research offer managerial implications, while others are more focused on theoretical or public policy implications.

The methods employed for a study should be related to the research question you are striving to address. The first step is to understand what is happening – and while your initial research question(s) may consider some relationships you believe are salient to the phenomenon, it is likely the question will be refined as you learn more. The best way to do so is to immerse yourself in the phenomenon. Such immersion is possible in various ways – including accessing archival data (e.g. news articles, blogs, social media posts) as well as through participant observation. When learning more about the phenomenon, create field notes that may aid you in honing the focal area for research; in addition to focusing on a particular aspect of

the phenomenon, what is of particular interest to you and what may be relevant to add to the literature will become clearer.

To better understand the phenomenon, it may be helpful to sketch (verbally and perhaps visually) the relationships observed. It will likely be informative to you to consider what participants are present, and the interactions that emerge between them. Importantly, you will want to consider factors at the macro, meso and micro levels that influence the focal phenomenon. For example, if the study considers family rituals, it will be important to consider whether those performances are related to cultural and national rituals, the interactions of the marketplace, and what constitutes a ritual performance. Consider studies of American Thanksgiving (e.g. Cross et al., 2017; Wallendorf and Arnould, 1991) where the macro level influences emerge through cultural norms (e.g. NFL games) and national observances (e.g. holiday), meso level influences are found in marketplaces (e.g. turkeys in grocery stores, homemade vs. convenience offerings), and micro level influences are evident through ritual actors and artifacts (e.g. side dishes, attendees, décor). Alternatively, family rituals may include possessions that are transmitted apart from national or cultural events and more aligned with family milestones. Consider intergenerational transmissions of possessions (c.f., Bradford, 2009; Price et al., 2000; Türe and Ger, 2016) where the macro factors may be of lesser consequence. Still, sketching out where and how those factors may be present will provide a more comprehensive understanding of the phenomenon and influences upon it. Understanding these influences will enable you to assess the research questions that will be pursued, and the relevant unit of analysis that will inform the data needed to answer those questions.

## IDENTIFYING DATA COLLECTION PROCESSES

With a better understanding of the phenomenon, the identification of a particular context, and refined research questions, the next step is developing a plan for data collection. Given the relationships of interest, what is the appropriate unit of analysis? It is important to understand this question at the onset to ensure you strategize the most relevant data collection plan. Understanding the unit of analysis will also shape where you are most likely to find the necessary data. Identifying where the data is that you need will then inform how to gain access. For example, Wallendorf and Arnould's (1991) study of familial Thanksgiving includes regional and cultural differences that influence ritual performances. To capture such variations, the authors built the training and fielding of a team of undergraduate research assistants into the data collection plan to support the broad collection of data (for example, see the methods in Bradford and Sherry, 2015; Wallendorf and Arnould, 1991). Broad samples may also include other types of data that do not require such an extensive team, such as data from archival sources. In a study exploring the Thanksgiving phenomenon, Cross and her colleagues (2017) explain how market practices and players support the evolution of consumer rituals through archival advertisements. No matter the research questions and required data, considering where and how data will be collected is a critical task.

Gaining access to data sources is a varied process. However, the process should be carefully considered, particularly if the phenomenon is not one in which you are a regular or likely participant. There will often be different considerations when data is part of the public record versus that held closely within individual experiences. If people are part of the process of accessing data – whether as community gatekeepers, librarians or participants – you will want

to craft a clear, brief pitch that can introduce individuals to your research interest and convey the importance of their (ideally convenient) participation. You may want to develop a script resembling a quick ‘elevator pitch’ that is orally deliverable in 10 to 20 seconds, or in a few sentences sent by text, direct message or e-mail. For example, in a study of the phenomenon of consumption journeys, Akaka and Schau (2019) chose to study this topic in the context of surfing communities, given the evidence of such journeys in this context via surfing practices and their own ability to access this community because of their experience as surfers. To gain access to the needed data, they asked individuals ‘if they would be willing to share their experiences of surfing over time for a research project’. Such an approach is likely to garner more takers than asking those same individuals to ‘participate in a study on recursive practices that support consumption journeys’. Simply put, your pitch should use language that makes it easier for individuals to understand what is being asked of them and quickly ascertain if they will participate.

When the data resides with people – individuals or groups – you need to consider where to find them. If you are seeking access to a group, there may be an organizer to contact; if to individuals, you will need to network your way to identifying participants. Snowball sampling (recruiting future participants from early participants) is a useful strategy for identifying group members, as Schau et al. (2009) demonstrate when researching elderly consumers. For archival data, access may require permission through a gatekeeper (e.g. forum moderator) or financial outlays to acquire materials (e.g. magazines). Importantly, you will want to cast a wide net in order to garner enough participation to achieve theoretical saturation and to ensure your data set reflects an appropriately broad set of perspectives. Rest assured that gaining access will likely take longer than you imagine, even if you share characteristics (e.g. expertise, involvement, identity) with your potential informants (individuals or groups) in the chosen context.

The preliminary data collection needed to flesh out the proposed study is likely to unearth new questions. For example, you may find the approach you initially employ enables you to access some understandings, but still others remain inaccessible or hidden. That is when you may wish to consider incorporating additional methods for data collection. This decision will be informed by the new information you believe is needed. Perhaps it is necessary to include supplementary ethnographic methods to better understand the lived experience. For example, when asking people to describe what something feels like, they may be unable to do so without prompts. Thus, including alternate modes of data collection may be helpful – such as projective tasks like user diaries, pantry tours, cartoons or asking people to create relevant images (Bradford, 2009; Bradford and Sherry, 2013; Coupland, 2005; McGrath et al., 1993). In addition, there may be a causal relationship you seek to test that may involve experimental methods. For example, LaTour and Deighton (2019) follow their interviews with Master Sommeliers, where they identified their process of learning to taste, with experiments with enthusiasts, to test the role of narrative and visual imagery in holistic processing in taste. Remain open to what may be needed to address the questions within the study.

A data collection plan should reflect an understanding of the best opportunities for amassing the necessary data. Thus, be sure to consider when the phenomenon of interest occurs. For example, it may be cyclical (e.g. linked to a holiday like Thanksgiving or a sports season like tailgating), have timeframes with higher participation (e.g. graduations tend to have more participants in May or June than in December; family vacations are often in summer; snowboarding occurs during winter seasons), or occurs on some days more than others (e.g. children’s

sports tournaments vs. workday commutes). It will be important to plan data collection for those times when you are most likely to obtain participation.

This body of information is necessary for a key milestone in conducting scholarly research: obtaining IRB approval.

## GAINING APPROVAL: SUCCEEDING WITH THE INSTITUTIONAL REVIEW BOARD (IRB)

The IRB of your institution will require that you obtain permission to collect data on human subjects. The need to oversee research involving humans can be traced to abuses of individuals in medical research conducted by Nazi doctors in the 1940s, and the 1972 public disclosure of the 30-year government-supported Tuskegee Syphilis Study, where African American men were left untreated for a treatable disease without their knowledge (Brandt, 1978). The documentation of the most extreme instances of mistreatment occurs with research related to medical programs; so, it is not surprising that institutions that house medical schools tend to have more extensive requirements for the documentation of research protocols for IRB approval. That does not mean social scientists cannot do harm with studies; however, the types of harm are different than those possible in medical research. The Milgram experiments on obedience to authority figures in the 1960s are early examples of the damage nonmedical research can inflict upon human subjects. More recently, Francis J. Flynn, a Columbia business professor, wrote to about 240 New York restaurants in 2001 claiming to have contracted food poisoning. Professor Flynn said he wanted to study how the restaurant owners handled complaints. Ten of the restaurateurs sued him, and the *New York Times* covered the research story.

The broader IRB standards tend to reflect an awareness of prior atrocities that made IRBs necessary. Efforts have been made to streamline the process for social scientists, but researchers will find the process takes time and effort that must be factored in (and completed) before data collection can occur. If IRB approval is not received prior to data collection, universities will not allow the ensuing data to be used in publications.

The IRB exists to ensure the protection and safety of individuals who choose to participate in your research. While your research endeavor is likely respectful and considerate, the IRB exists to ensure that all human research participants are well informed about the study they are being asked to participate in, as well as any potential impacts due to participation.

The IRB classifies research that includes people – that is ‘human subjects research’ – in one of three categories: exempt, expedited or requiring full committee review. Most qualitative research involves communication or interpersonal contact between researchers and participants; thus, IRB approval is needed. Typically, qualitative research in the social sciences falls under either the exempt or expedited category. Different universities have different expectations for exempt and expedited human subjects research, so it is best that you consult with your IRB early on. In addition to the research protocol, they will consider the characteristics of participants, with closer review of research involving children or other vulnerable populations.

Some qualitative data collection does not require IRB approval. Publicly available information scraped from websites does not require IRB approval, although if real names are used, identifiers should be disguised or deleted. Further, be sure that data is in fact publicly availa-

ble. If data is maintained within groups that require an invitation or login, the researcher must obtain permission from the group to participate in the study.

For all research involving interviews, informed consent is required, and an IRB will have forms for this purpose that provide disclosure of the study's purpose, study procedures, expected duration, risks of participation, benefits of participation and benefits to others and society. The form will make clear that participation is voluntary.

## STARTING THE WORK

Launching the project in earnest is where the real fun begins. You have a plan for data collection and initial ideas to begin. As you delve into data collection, you will likely revisit your research questions and your work plan, which may need to be adjusted as you learn more about the phenomenon, the literature and the relationship between them.

Our plans do not always work as intended. Access to the field may not yield the results you expect and you may have to craft a new strategy. The data you hoped to obtain may not materialize. The literature you were so sure of at the start may no longer seem relevant. As you continue the project, you will no doubt need to adjust your plans – that is expected and perfectly fine. You may also encounter false starts – the selected context does not appear to be representative of the phenomenon of interest, you are having difficulty accessing contacts that have the information you seek, the season has passed. The key with any project is to remember why you wanted to pursue this research.

When launching the project, you will want to assess what tools you need to effectively and efficiently collect data. There are now so many tools in our pocket – e.g. smart phones allow photos, videos, voice recordings, note taking – that data collection can occur more readily when an opportunity presents itself. Though electronics are an easy way to capture data, you may want to also keep a small notepad handy to capture notes, make a quick sketch of a layout, or simply write notes when a participant refuses to be recorded. The tools you need will depend on the data you plan to collect. If specialty tools are needed, take time to practice with them prior to starting data collection.

One of the exciting aspects of qualitative research is that it often leads to a stream of studies that can sustain your interests for further projects. For example, the presence of an 80-year-old woman in a focus group who was enthusiastic about on-line shopping (Gilly and Wolfinbarger, 2001) led to a research project on identity in retirement (Schau et al., 2009). The surprises experienced in qualitative research often lead to more research questions to pursue.

Remember that any research worth doing will take time, effort and persistence. The most important part is simply to get started!

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## 2. Making contexts matter: selecting research contexts for theoretical insights and substantive importance

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### INTRODUCTION

A difficult task for social scientists is to negotiate the links between theoretical ideas and the concrete instances of those ideas, as tensions always arise between theoretical concepts and their empirical manifestations. Examples abound of researchers who devise experiments, select field settings or interpret contexts in ways that traverse the gulf between theory and data. However, relatively few guidelines exist for researchers attempting to pry understanding and explanation from the contexts in which they study, or to align theories and contexts. Context can be broadly conceived of as ‘the surroundings associated with a phenomenon which help to illuminate that phenomenon’ (Johns, 2006, 386). That is, a context is a holistic environment within which phenomena are studied (Stremersch et al., 2023). Attention to context means recognizing the complex ecosystem that surrounds any observation. Context is multifaceted and can be examined at various levels of analysis, from macro to micro (Price et al., this volume).

Choosing what, why and how to study contexts remain thorny problems that deserve scholarly concern. Unfolding myths around consumer culture theorists, Arnould and Thompson posit: ‘First and foremost among these myths is that consumer culture theorists study particular contexts as ends in themselves’, going on to paraphrase Geertz (2008), ‘consumer culture theories do not study consumption contexts; they study *in* consumption contexts to generate new constructs and theoretical insights and to extend existing theoretical formulations’ (2005, 869). Since then, much has changed, including our own evolving perspectives on the role and importance of contexts. In this chapter, we emphasize that the goal of generating both theoretical and substantive insights should motivate the choice of contexts, restricting our discussion to selecting contexts for interpretive research. However, our view is broader: all marketing researchers who seek to do relevant research should attend carefully to their choice of context.

### THE IMPORTANCE OF CONTEXT

Researchers rely on contexts to develop, test and extend theories (Burawoy, 1998) – stories about why behaviors, events, structure and thoughts occur (Sutton and Staw, 1995). Contexts give theoretical stories veracity and texture. Contexts yield critical substantive insights for practitioners (Cayla and Arnould, 2013; Stremersch, 2021). Practitioners care about theory too, as there is nothing quite as practical as a good theory derived from real-world stakeholder problems (Christensen and Raynor, 2003; Zeithaml et al., 2020). Moreover, the explosion of data and textual analysis tools that are available at little cost further fuels practitioner and

academic interest in contexts, partly by vastly enhancing access to context-based observations (Berger et al., 2020).

Exactly how contexts enable theoretical and practical insights often remains implicit. The role of contexts in developing a better understanding of consumer behavior and marketing practice is difficult to articulate. Contexts that engage our emotions, imaginations and senses may be opportune for ‘revelatory incidents’, or help clarify boundary conditions with ‘negative cases’ (Emigh, 1997; Fernandez, 1986). The power of contexts to engage our emotions and our senses affords them potential power to transform our lives and the lives of others through explication.

Simply paying attention to provocative natural occurrences is one of the most useful heuristics for generating research questions (Becker, 2008; McGuire, 1997; Wells, 1993). Contexts and occurrences that seem puzzling or paradoxical move us to search for explanations or resolutions, stimulating discovery (Fiske, 2004). Part of the pleasure and fascination of contexts is that they excite comparison in ways with things we already know, which can lead to more comprehensive theory (e.g. Burawoy, 1998). While contexts are vital research tools, the whats, whys and hows of selecting and leveraging contexts remain understudied and underappreciated. The remainder of this section underscores the importance of context for enhancing stakeholder relevance and addressing societal grand challenges (<https://sdgs.un.org/goals>).

## CALLS FOR A RETURN TO CONTEXT

Many forces converge to direct attention to the impact of context in consumer behavior, marketing management, public policy and related disciplines (Janiszewski and Osselaer, 2022; Johns, 2006; Stremersch et al., 2023). Pressures to publish research with societal impact outside of disciplinary silos has dramatically increased across business schools (Ozanne et al., 2017), reflecting academic recognition that ‘the route to good theory leads not through gaps in the literature but through an engagement with problems in the world’ (Kilduff, 2006, 252). Van Heerde et al. advocate for what they term ecological value as a criterion for evaluating research, or ‘the degree to which research reflects and is relevant to marketing as it exists and evolves among marketing stakeholders and marketing ecosystems’ (2021, 1). They urge researchers to consider the real world at each step of the research process.

Disillusionment with rigorous research that lacks interestingness and practical relevance has intensified, with calls to do research differently (e.g. Lehmann, 2020; Pham, 2013; Zeithaml et al., 2020). Prominent experimental researchers voice concern that the dominant theory-first, deductive approach limits discovery and encourages incremental research with limited relevance to marketing stakeholders (Golder et al., 2023; Lynch et al., 2012). In addition, there is a developing sense that emphasizing surprising and novel theoretical insights, regardless of pragmatic utility, diverts attention from understanding and identifying practical interventions for vexing societal problems (Corley and Gioia, 2011; Stremersch, 2021). Calls for non-deductive ‘empirics-first’ research occur across paradigmatic silos to understand contexts critical to stakeholder needs. Arguing for learning from data, Golder et al. (2023) define this approach as encompassing non-deductive approaches (inductive, abductive) that need not lead to theory.

Paralleling the disillusion of other marketing scholars, some CCT scholars argue that, of late, the field has moved too far from an empirical approach that recognizes the ‘time- and

context-specific nature of interpretive research to generate novel theoretical insights and [instead] favor[s] a more deductive approach where researchers...begin with a theory and seek to demonstrate its relevance to a particular empirical context' (Belk and Sobh, 2019, 491). Many studies offer evidence that enabled theory-building is fruitful (Dolbec et al., 2021), but like experimental research, an overemphasis on it can devolve into research that do not serve the field. These include, but are not limited to: an anxious, theory-of-the-month approach, where theories are quickly adopted and abandoned in a misguided search for novel contribution; zealots who reject research that ignores, mixes, or modifies their pet theories; and research so devoid of context that its substantive implications are lost.

MacInnis et al. provocatively posit that marketing scholars have 'handicapped ourselves by adhering to a set of implicit boundaries or defaults about what we study, why we should study it, and how we communicate the significance of our work' (2020, 1). They argue marketing academics eschew 'unstructured real-world phenomena' and 'substantive ... issues pertinent to marketplace stakeholders and academics in other disciplines' (2020, 2). Attention to context-choices can help alleviate myopias and transcend the implicit boundaries that constrain the importance and impact of our work. That is, while marketing academics study *in* contexts, some contexts are more important to engage with and study *in*, because of the problems foregrounded and the potential value of derived theoretical insights for pragmatic action.

## CONTEXTS INFORM SOCIETAL GRAND CHALLENGES

Some contexts are more important to understand than others. In seeking to tackle societal grand challenges, attention to the contexts marketing researchers study becomes increasingly important (e.g. Chandy et al., 2021; George et al., 2016). Researchers must study contexts that foreground them, using a problem-centered approach to select phenomena for study. That is, contexts should help drive *what* we study. Simply put, to render insights into the most important problems facing the world – problems such as 'persistent poverty, inequity, illiteracy, disease, climate change, pollution, human trafficking, among many others' – we must 'broaden the set of outcomes we study' (Chandy et al., 2021, 1). Moreover, we need to commit to seeking solutions to these problems across time, contexts and actor entanglements, using various theoretical perspectives. This will require resisting a conclusion that we have already satiated our need to study a particular problem or setting.

Qualitative researchers are trained and predisposed to embrace grand challenges through contextual immersion. Eisenhardt et al. (2016) enumerate characteristics that make inductive methods especially promising for addressing grand challenges, beginning with the argument that 'they excel in situations for which there is limited theory and on problems without clear answers' (1113). Bansal et al. note, 'as we face more wicked problems in our world, scholars are increasingly adopting qualitative methods to unpack these complex challenges' (2018, 1189). Within marketing and management, papers employing varied qualitative approaches are among the most cited, offering insights that address real-world problems, challenge taken-for-granted theories, and expose new substantive and theoretical directions.

CCT researchers often study what surprises, bewilders, enchant and/or engages. Researchers do not want to lose that spark. As noted, contexts engage emotions and senses, stimulate discovery, invite description and excite comparison. Contexts judged as unworthy because they occur in small markets, or unusual or extreme consumption settings, can render rich theoretical

insights. At the same time, there are many challenges demanding understanding and solutions. A key question for selecting contexts should be: can we orient our craft around the urgent issues facing consumers and societies; that is, can we strike off on new paths emboldened by the ‘issues that comprise the landscape – and horizon – of today’s world’ (Howard-Grenville, 2021, 4)?

Using a problem-centered approach to select phenomena still allows for the use of many useful tools for *how* to study those contexts. For example, the tool of ‘going to extremes’ can be useful in exploring thorny problems as well. Eisenhardt et al. (2016) emphasize the value of extreme cases for studying grand challenges, noting they ‘can create broad awareness of the focal challenge’ (1118). Moreover, extreme cases ‘can make it easier to generate insights that would otherwise be obscure or even absent from a “typical” case’ (1118). However, Eisenhardt et al. (2016) posit the value of investigating modal contexts as well, seeking to leverage context choices for transportable insights about substantive consumption-related problems. Observation of mundane, everyday life reveals insights around substantive consumption problems (Ehn et al., 2015).

## THE DANGERS OF CONTEXT

Evocative, surprising, engrossing contexts can be fraught with danger for researchers. In this section, we briefly overview some cautions for CCT researchers when choosing contexts.

### Burning Questions

Young scholars are often told ‘study what you are passionate about’, and this is not entirely wrong, but it is woefully imprecise. In truth, passion is not an adequate reason to choose a context; rather, the driving passion should be the *burning questions* a context evokes, not how much it may personally resonate with the researcher. Echoing Fiske’s sage advice (2004), Price encourages scholars to let their own vexing problems be their guides (2015), choosing fellow travelers who share a passion, determination and persistence to answer a shared burning question (2020). A burning question is one that, if answered, would make a big difference in the researcher’s own beliefs and behaviors. If widely shared, an answer to a burning question can result in substantial change (Zaltman et al., 1982). Price (2022) elaborates ‘a burning question provides direction [and] motivates and accelerates action to reach a goal’. The push for increased relevance in research, combined with the dire condition of our planet, provide motivation to probe questions that pertain to grand challenges. Burning questions are situated in nuanced contexts, and while all contexts possess their own burning questions, a person’s beloved context does not mean it is suited to addressing burning questions. Furthermore, the taken-for-granted ease with which we engage with our passion-laced contexts can make it difficult to attain the analytical distance necessary to understand them (Zaltman et al., 1982).

Of course, there are cases where consumer and market researchers can leverage their craft and honed curiosity, turning their *love of being in a context* into a compelling query that leads to provocative theoretical insights. For example, using the context of surfing, researchers uncover how consumers construct a life-long identity journey (Akaka and Schau, 2019), how a social practice diffuses and changes over times and places (Akaka et al., 2022) and how consumers assemble romantic experiences of nature (Canniford and Shankar, 2013).

Unfortunately, while some scholars can successfully leverage a beloved context, other scholars wallow in a beloved context absent any personal burning questions.

### Balancing Context Immersion and Theoretical Distance in Fieldwork

Researchers can become over-absorbed in contexts. This tendency can waste resources by keeping researchers in the field too long and hinder theoretical insights because of an inability to manufacture distance from informants' lives (McCracken, 1988). Moreover, researchers who are caught up emotionally in a context may be unable to recognize the elements and processes contributing to experiences in the context. To trace reactions of others and examine how experiences are patterned requires a degree of researcher distance. Researchers walk a fine line between 'going native' (e.g. absorption in a context; maintaining the analytical distance needed to develop theoretical and practical insights) and wrestling with the inevitable paradox between need for intimate familiarity with and distance from context (Arnould et al., 2006).

Leveraging the tactic of developing diverse bi-gender, biracial, and bi-disciplinary research teams (see Sherry, this volume) can help provide analytical distance by fostering differing perspectives. Such general collaborations help researchers 'to tackle the challenges of contextualizing without essentializing, generalizing/extrapolating while appreciating specificity (Ger et al., 2019, 13). Although published research rarely indicates whether and how specific collaborations benefit the research, interpretive research draws on such teams. For example, Maciel and Wallendorf (2021) make use of bi-gendered perspectives in their study of knitting to uncover how consumers use space to valorize marginalized and devalued gender identities and subvert hierarchies. Examining the process by which masculine dominance persists in the video gaming culture despite women's efforts to subvert gendered boundaries (and even though women represent nearly half the market) may have benefitted from a bi-gender, biracial team (Drenten et al., 2023). Implications from this research speak to the cultural legacy of tokenism with relevance to broader systems of domination. A biracial team was used to uncover the effect of financial service providers' mistreatment on minority (Black, Hispanic) customers' autonomy and self-esteem (Bone et al., 2014). A biracial, bi-gender, bicultural team investigated how Ghanaian converts to Pentecostalism experience personhood, unpacking a state of being caught between a desired and undesired individuality (Appau et al., 2020). Further, Barnhart et al. (2023) leverage a bi-disciplinary team (marketing and law) with different personal experiences of gun culture to investigate consumers' moral appraisals to armed protection scenarios. This study nuances theoretical discussion of consumer responsibilization (Barnhart et al., 2023). This is just a sampling of interpretive consumer research that reflects potential strengths emergent from employing diverse research teams (see also Arsel et al., 2022). However, as with other tactics, use of a research team does not guarantee analytical distance.

Balancing immersion with theoretical distance is challenging for interpretive research. Growing recognition of voices left out in marketing scholarship heightens the imperative to recognize omissions and commissions of a given perspective (Eckhardt et al., 2022). Regardless of the specific strategy researchers adopt, a full appreciation for their own subject position and how that perspective *both* enables and constrains investigation is critical. Overall, consumer research needs deeper explorations of subject positions at various intersections, with due attention to the subject position(s) of the researcher(s) and study informants (Ger, 2018).

### Balancing Context Immersion and Distance in the Write-up

As interpretive researchers, we have grappled with how much and where to write about context for over 30 years. Too much emphasis on context leads to over-descriptive accounts – metaphorically, presenting all trees and no forest. Theoretical insights can be shrouded or lost. At the same time, too much theoretical distancing loses the nuances of why the context was chosen and dilutes the elements that give it theoretical power. It is essential to be transparent about significant features of engagement with the context, but extraneous detail or formulaic templates likely wastes precious journal space and is unproductive (Eisenhardt et al., 2016; Bansal and Corley, 2012). At a minimum, researchers must demonstrate that emergent theoretical and substantive insights are well-grounded in data and related to the chosen context. As such, presenting data in formats that help readers understand the chain of evidence is crucial (Eisenhardt et al., 2016). Beyond this, guidelines on how much and where to present information on context are sparse.

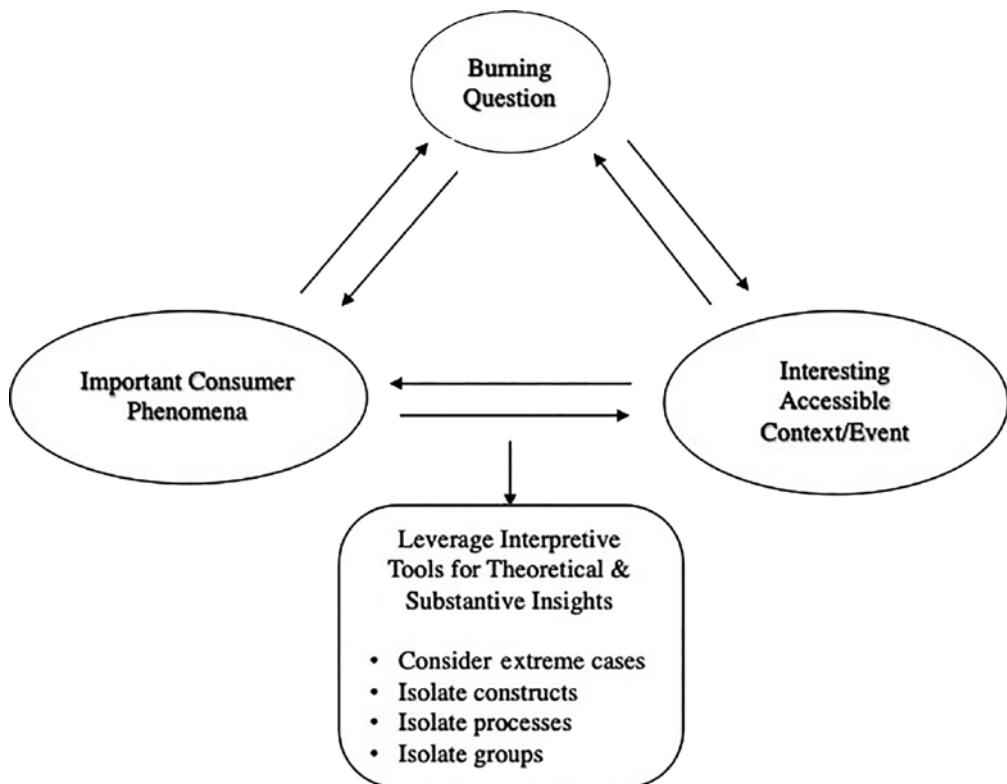
It is crucial to attend to the balance between theory and context, as too much focus in either direction makes grounded interpretive research inaccessible and irrelevant. However, there is no magic formula. We posit the value of apprising readers early of the key theoretical and substantive insights informed by the distinguishing characteristics of the research context. Unfortunately, many interpretive papers published in the last two decades in top marketing journals do not hint at the context until the method section, where it is often inserted awkwardly, implying it is mere background to the study's findings. In our opinion, this strategy obscures the substantive value of the findings for real-world problems, privileging those readers who are well-versed in a specific theoretical conversation. Conversely, reviewers exhibit impatience with descriptions of context, which they mistakenly opine detract from the theoretical heart of the story. As such, researchers should leverage contexts for theoretical and substantive impact.

## HOW TO IDENTIFY A STUDY CONTEXT

Structured choices around what, why and how to study contexts can result in more theoretically and substantively insightful research on global grand challenges. In this final section, we suggest guidelines for identifying interesting and accessible contexts that brings together a researcher's burning questions with important phenomena. We hope to encourage simultaneous consideration of theoretical and substantive insights in choice of context. Choice of context is just the first step. Next, qualitative researchers determine what arguments to foreground and background and draw on a set of useful tools to leverage that context/event for theoretical and substantive insights (Price et al., this volume).

As with any project, researchers can begin anywhere – *if* they iterate, repeatedly moving back and forth between question, phenomenon and context. As illustrated in Figure 2.1, researchers can begin with a burning question, an important consumer phenomenon they want to understand, or an accessible context or event that they assert is an example of something important. When all three come together through this process of iteration, research can bring understanding and theoretical insights to important consumer phenomena.

To illustrate, researchers could begin with a passion to address a major grand challenge (e.g. sustainability, hunger, water, health, loss of biodiversity, wellness), then ask what contexts



*Figure 2.1 How to select a study context*

exemplify this phenomenon, and among those contexts, which ones are accessible and how. Godfrey et al. (2022) began their project on consumer repair this way; they wanted to study the topic, then considered what type of repair contexts were accessible, and which of those illuminated something some people choose to do, and others do not. Godfrey et al. (2022) focused on shoe repair, and later added data on mountain bike repair to highlight consumer maintenance and self-repair of objects. Many other projects begin this way – with a problem researchers identify as deserving of empirical attention. Theory often emerges later to provide a broader framework and understanding of the phenomenon.

Sometimes, a more straightforward place to begin is with a local or accessible context. Researchers can ask: Which local contexts are exemplars of important consumer phenomena that demand additional study? Do these local contexts highlight consumers, responses, and/or processes that are understudied and important to understand? How interesting and puzzling is a particular local context to the researcher? Can it inform one of the researcher's own burning questions? In our experience, local actors are motivated to provide insights and welcome researcher help. Examples of this approach abound; we offer a sample below.

Weijo et al. (2018) provide insights into how consumer movements are mobilized through collective creativity in the Restaurant Day movement (a resistant response to Finnish food regulation). The title informs the reader of the theoretical conversation the authors join, the contribution they make and the context that enables it: 'Consumer movements and collective

creativity: The case of Restaurant Day.’ Lots of academic research focuses on consumer movements, but understanding them is needed to address grand challenges. As such, they are worthy of additional research. While the authors use assemblage theory, they background this in their study write-up, focusing instead on the consumer phenomena (consumer movements) and how an understudied process (collective creativity) can change the marketplace. In this research an event – the introduction of Restaurant Day and surrounding media attention and consumer participation – provoked the inquiry.

Local events can be a great place to identify a context. Phipps and Ozanne (2017) study how Australian consumers responded to the longest-lasting drought then recorded. Data collection spanned the drought’s peak, when water scarcity was at the forefront of consumers’ and the public’s attention. Neither the title or abstract mention anything about the context – it is backgrounded to highlight a theoretical story about consumers’ responses to sweeping threats to their security and routine practices. The theoretical story is compelling, but the context is perhaps even more significant. It highlights a thorny problem – e.g. that numerous parts of the globe are experiencing drought and water scarcity (Boretti and Rosa, 2019).

Gonzalez-Arcos and her research team’s focus (2021) was a local event. They sought to understand consumer resistance to a nationwide ban on plastic bags in Chile in 2019. The authors show that when interventions aim to change individual behaviors rather than social practices, they unsettle those practices and place undue responsibility on them. The title quotes an informant trying to figure out how to get groceries home – ‘How Do I Carry All This Now?’ – that captures consumers’ emotional reaction to the unwanted additional responsibility for systemic sustainability. Their research makes a theoretical contribution to understanding practice chains, but this is backgrounded, with the authors instead highlighting directions for practice-based sustainability interventions.

Beyond investigating a local event, local contexts offer rich sites to grapple with big problems. For example, Gollnhofer et al. (2019) investigate how consumer movements can fight food waste in Germany by partnering to build alternative paths for waste. Brunk et al. (2018) analyze the East German ‘Ostalgia’ marketplace that emerged after German reunification. It identifies how socialism inspired critiques of capitalism are transformed into ‘a thriving market for nostalgic consumer identity resources’ (1326). Bradford and Sherry (2015) look out of their office window to observe ‘tailgating’ on the Notre Dame campus lawns in advance of a home game and set out to investigate the tailgating ritual as a site of popular communion and public intimacy. Is this a big problem? The reader can decide, but by uncovering ‘how tailgaters personalize public place and publicize personal place’, the authors ‘demonstrate how individuals negotiate two of the fundamental consumption ideologies of public space’ (148). The limits on and control over personalizing public place have numerous implications for sustainability and landscapes, from homeless encampments in public parks to livestock grazing rights on public land (e.g. Peck et al., 2021).

When a burning question, a consumer phenomenon that researchers want to understand and an accessible context or event that seems to be an exemplar come together, research can bring understanding and theoretical insights to critical consumer phenomena. As interpretive researchers, we can bring our skills and curiosity to *any* context, so why not select those while attuned to ‘what needs attention and repair’ (Howard-Grenville, 2021, 9)? In addition to the examples given above we summarize a few more examples in Table 2.1.

**Table 2.1** *Illustrations of consumer phenomena, ‘burning’ question(s) and accessible contexts and events*

Study	Important consumer phenomena	‘Burning’ question	Interesting, accessible context/ event	Key insight for theory and practice
Bradford and Boyd, 2020	Organ donation	How can organizations mitigate donor experiences of sacrifice?	Co-authors are kidney donor and recipient	Using the marketing mix (not just promotion) can mitigate the three types of sacrifice donors experience
Bhatnagar et al., 2023	Lactose intolerant consumers	How do consumers learn how and what to eat in a hostile learning environment?	Finland top dairy producer and consumer, difficult food landscape for managing LI	Grappling with an impaired body consumers’ transition with unguided experiential pathways in an unsympathetic environment
Kozinets et al., 2017	Digital image sharing	How is desire changed by contemporary technology?	Rise of ‘food porn.’ Over 60% of 13- to 32-year-olds have shared images	Networks of desire create a passionate new universe of technologically enhanced desire
Rosenberg et al., 2023	Fashion	How do access-based and ownership consumption coexist?	Finnish Clothing Library	How shifting desires determine access-based and ownership consumption
Weinberger and Wallendorf, 2012	Community response to disasters	How does a community come together and create a path to recovery following a disaster?	First Carnival celebration after Hurricane Katrina	Ritual intracommunity gift-giving helps repair social damage and provide a path forward

As foreshadowed in Figure 2.1, iterating to a study context is just the first step. Researchers next need to decide which arguments to foreground or background. Specific enabling interpretive tools, including isolating constructs, isolating process, isolating groups and going to extremes can help researchers leverage context for theoretical and substantive insights (Price et al., this volume).

## CONCLUSION

This chapter encourages researchers to harness the potential of contexts by selecting them for theoretical and substantive value. Culture theorists are uniquely equipped to address grand challenges and thorny problems. Ultimately, a thoughtful use of research contexts can contribute to better understanding of our lives as human beings and consumers, and advance an agenda to create a better world. Identifying the right study context involves engaging with important consumer phenomena; accessible, contexts that seem pregnant with interpretive potential; and researchers’ own burning questions.

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### 3. Understanding inclusive research in marketing: empowering participant voices

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#### INTRODUCTION

Understanding diverse consumer perspectives has emerged as pivotal in driving business success and has garnered increased attention from marketing scholars. The size and diversity of modern markets, coupled with changing consumer composition and the globalization of business, necessitates a comprehensive understanding of diverse perspectives. Gaining a deeper insight into the experiences of people from diverse populations requires the use of alternative and more inclusive research models. Inclusive research is an approach that is relevant to the people concerned – it matters to and benefits them; an approach that provides access, represents their views and experiences and treats them with respect (Walmsley and Johnson, 2003, 6). Inclusive research, by its very nature, tends to yield positive societal and institutional changes. This chapter focuses on defining inclusive research, understanding the process of conducting inclusive research, considering who is affected by inclusive research and making recommendations for expanding the utilization of the inclusive research approach.

Inclusive research represents an important shift towards partnering with underrepresented populations to produce work that contributes to the population in many ways. Through collaborating with the population of study at various points in the research process, researchers can have a positive impact by answering research questions that serve the population's needs and interests. Researchers can also facilitate a renewed sense of participant agency, which is particularly important for populations that historically may have been ignored or harmed by research (Scharff et al., 2010). Further, research methodologies become sites of struggle for underrepresented groups who often have little control or ownership of the research process (Tuhuiwai-Smith, 1999). By working together with informants, researchers can more accurately support and provide a voice to people in diverse populations working towards positive change.

#### DEFINING INCLUSIVE RESEARCH

Inclusive research has its roots in the field of learning disability research and can be thought of as research that changes the dynamic between research *on* people to research *with* or sometimes *for* people (Nind, 2014). Inclusive research embraces a range of approaches traditionally termed 'participatory', 'emancipatory' and 'participatory action' research (Walmsley and Johnson, 2003, 10). The term 'inclusive research' has the advantage of creating a sense of interconnectedness between these three terms; as an umbrella term under which all forms of inclusive research reside. Participatory research is a form of inclusive research defined as research that invites those being researched to be involved in the research process (Bigby et

al., 2014; Nind, 2014). Emancipatory research is defined as research that politically confronts social oppression (Bigby et al., 2014; Nind, 2014). Participatory action research is defined as research that invites those being researched to be involved in the research process, and politically confronts social oppression (Bigby et al., 2014; Nind, 2014). All forms of inclusive research have a deeper connection to the studied population, either through partnering with the population, engaging in activism alongside the population, or a combination thereof.

The term inclusive research shares commonality with qualitative research more broadly because of its concern with grounding research in the experiences and viewpoints of informants (Nind, 2014). However, most qualitative research maintains that the researcher is the person who defines the questions, owns the data, controls the interpretation of the data and communicates the conclusions. These aspects and more of the research process are problematized in inclusive research, which intends for agency to flow between the researcher and informants.

In general terms, inclusive research cannot be translated into one way of doing things, as the options and permutations of this approach are extensive (Walmsley and Johnson, 2003). However, it is possible to identify principles and characteristics underlying inclusive research. Walmsley and Johnson (2003) highlight principles related to conducting inclusive research with *underrepresented groups* in their research with people with learning disabilities:

- The research problem should be one that is owned (not necessarily initiated) by *the population*;
- It should further *the population's* interests; non-population people should be on *the population's* side;
- It should be collaborative – people in *the population* should be involved in the process of doing the research;
- People in *the population* should be able to exert some control over process and outcomes;
- The research question, process and reports must be accessible to people in *the population*.

Thus, inclusive research is a collective term that encompasses participatory, emancipatory and participatory action research. These approaches are linked together by their emphasis on incorporating the population of study into the research process (participatory and action) and driving social change in partnership with the population (emancipatory and action). For research to be considered inclusive, the population of study must be able to have a say over the research process and/or the research must have an objective to foster positive change in partnership with the population.

## INCLUSIVE RESEARCH IN MARKETING

In marketing, the need for inclusive research has been driven by the broader societal recognition of the need for diversity, equity and inclusion (DEI) across marketing organizations and in consumer marketplaces. In the research context, diversity refers to real or perceived physical or sociocultural differences attributed to people and the representation of these differences in research; equity refers to fairness in the treatment of people in terms of the opportunity and outcomes of research; inclusion refers to creating a culture that fosters the incorporation of diverse groups, as opposed to the exclusion or marginalization of such groups in the research process (Arsel et al., 2022). Taken together, DEI in a research context is typically

oriented toward procedural and distributive justice outcomes when conducting research in organizations and institutions (Arsel et al., 2022). This focus on social issues has fostered the development of marketing academic research organizations such as Race in the Marketplace (RIM), Transformative Consumer Research (TCR), and Gender, Markets and Consumers (GENMAC), among others, all of which are grounded in DEI initiatives and promote inclusive research as primary to their motivation.

Within the *Journal of Consumer Research*, Arsel et al. (2022) conducted a review of the DEI research published in the journal. Their review organized this stream of research by the following axes of difference: gender, age and body; race and ethnicity; social class and social status; and religion and cultural identity. Of the 54 articles highlighted in the curation, 28 were qualitative research projects. We utilized this set of qualitative DEI articles to help provide a snapshot of the level of inclusivity in the design of marketing research with underrepresented groups. Our review of this subset of research demonstrates the differing ways marketing scholars conduct inclusive research in this exemplar journal.

## WAYS OF DOING INCLUSIVE RESEARCH IN MARKETING

Our review of the diversity, equity and inclusion research in the *Journal of Consumer Research* helped us identify characteristics of inclusive marketing research. While none of the studies were specifically labeled as inclusive research projects, several studies were identified as adhering to principles or possessing the characteristics of inclusive research (Walmsley and Johnson, 2003). More specifically, our review revealed the importance of three characteristics of inclusive research, namely, (1) participant involvement, or the intensity of the collaboration between the researcher and the population, (2) participant agency, or the degree of agency the population informants have in the research process, and (3) participant access, or whether the population informants have access to the results of the research. These three characteristics connect directly to Walmsley and Johnson's (2003) inclusive research principles and were adhered to by marketing scholars in varying ways. Figure 3.1 highlights these characteristics and relates them to the three inclusive research approaches in marketing.

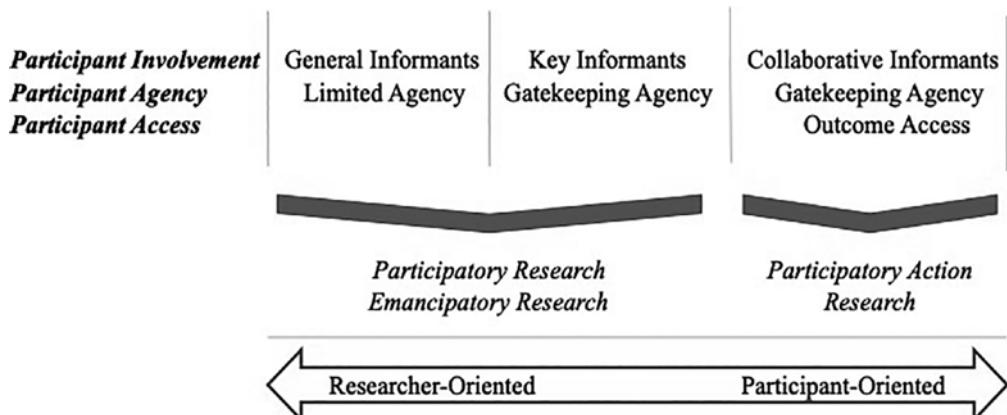


Figure 3.1 Inclusive research approaches in marketing

In the research reviewed, *participant involvement* represented the degree to which informants participated in the research project. Participant involvement ranges from shallow in terms of utilizing general informants, to deeper with the utilization of key informants, to deep engagement with collaborative informants. Ideally, key informants differ from general informants in that they have a more formal role within the community/population, and have access to the information desired (Creswell and Poth, 2016; Faifua, 2014). Collaborative informants differ from key informants in that their role in the research process extends beyond data collection. Several studies discussed the utilization and roles of key informants, describing them as 1) part of a snowball sampling frame to access more informants (Sandikci and Ger, 2010), or 2) participating in follow-up conversations to confirm the accuracy of the interpretive accounts (Luedicke, 2015; Schau et al., 2009).

*Participant agency* represents the amount of power informants have in the research process. This agency manifests in general informants having little to no agency in the research process, to key informants enacting gatekeeping roles, to collaborative informants being involved at various stages in the research process. For example, Izberk-Bilgin (2012, 667) described participant agency when discussing how her informants ‘served as gatekeepers and, once they approved of the study, allowed access to their husbands and other family members’. Importantly, such key informants can decline to collaborate with the researcher and block access. This affords informants necessary power in the process of inclusive research.

Appau et al. (2020) published a study investigating the religious experiences of Pentecostal converts transitioning from the secular world to a Pentecostalism one. To gain access to this community, the researchers had to balance holding outsider positions as researchers with the agency of members in the population. They discussed these inclusivity concerns in a subsection of their method section, titled, ‘Negotiating Researcher Positionality’ (see Peñaloza, 1994 for another example titled ‘Research Subjectivity’). Within this aptly titled subsection, the authors describe how they explained the merits of the study to a Pastor and his wife before meeting with church leadership to further discuss the nature of the inquiry. Concerns about interview questions were raised and addressed during these meetings and the following quote was included in the methodology subsection that captures the negotiation of the lead researcher’s positionality through building a common bridge of understanding:

I also presented myself as an insider, a fellow Ghanaian from a low-income family, who has been fortunate to gain the opportunity to study abroad and who is now looking for a place to collect data to earn my degree. This resonated well with them, and I could sense they were deeply satisfied by the realization that giving me access was an exercise of altruism toward someone they could identify with ... [Also, this insight] was important to make my participants see that I was one of them. (Appau et al., 2020, 173)

Informants played an active role in this study as collaborative participants. Since collaborative informants have a high degree of involvement with the research role, they also possess gatekeeping agency and can facilitate access to other members of the population. Collaborative informants in this study also gave feedback on the appropriate nature of interview questions. This engagement allowed the researchers to conduct research that was both mindful of the population’s culture and driven by members of the population.

*Participant access* represents the access informants have to the results or outcomes of the research. In the *Journal of Consumer Research (JCR)* studies we reviewed, participant access was represented only in Tian and her colleagues’ (2014) participatory action research project

(PAR) aimed at creating interventions for people with type 2 diabetes. Native-American and Hispanic informants, who represent a population hard hit by the disease, collaborated with the research team to develop information communication technologies to function as entertaining health education aids. The research conclusions focused on realizing the power of technology-enhanced narratives to build collaborative therapeutic communities and to provide impetus for affecting social change and action in health care systems (Tian et al., 2014).

Informants in Tian et al. (2014) not only had access to the results, but they were directly involved in developing tangible outcomes. It is important to note that granting action-oriented access to research results/outcomes often falls outside of the scope of many research objectives for studies in the *Journal of Consumer Research*. As a result, projects not specifically designed to be inclusive may not report action-oriented outcomes. Papers that consistently focus on inclusive access are more likely to be published in marketing journals such as the *Journal of Macromarketing* and the *Journal of Public Policy and Marketing (JPPM)*, or outlets where DEI efforts and positive societal impact are more of a primary focus. For instance, Hill et al.'s (2015) *JPPM* study ethnographic study that investigates restrictions on choices imposed by institutional forces in prisons is exemplary of advanced participant involvement, agency and access in collaborative inclusive research. In their method section, they outlined a discovery process that 'passed through three phases co-created by one of the researchers and (the informants)' (Hill et al., 2015, 158). They state:

This project was guided by tenets of ethnography whereby researchers occupy a locally appropriate role (Hill, 1991) as well as principles of PAR whereby community members are invited into research on their terms for the purposes of consciousness raising and institutional change (Ozanne and Saatcioglu, 2008). The sensitive nature of the men's subordinate position in the prison system required an initial period of trust building (Phase 1), while Phase 2 involved a shift in the power relationship away from the traditional researcher role to that of facilitator and active participant in the process. The final phase (Phase 3) required reversal of leadership, whereby the men used data and interpretations to press for collective agendas in formal settings and initiate novel methods of advocacy.

Participant access is achieved through the application of various analytical layers and the subsequent presentation of findings. In this study, the collaborative, co-researcher role of the informants advanced to a level that warranted co-authorship and the informants (the Gramercy Gentlemen) were listed in the study's byline. This study, and our review of the select *Journal of Consumer Research* articles, suggests research may be inclusive by context, in that it explores phenomena within an underrepresented population, but to be inclusive methodologically necessitates advanced levels of participant involvement, agency and access.

## INCLUSIVE QUALITATIVE RESEARCH APPROACHES IN MARKETING

Our review of the curated qualitative research offers different cases of participant involvement, agency and access across a spectrum of methodological scenarios. In addition, we explore how inclusive research approaches shape the depth and breadth of informant inclusion throughout the research process. Specific qualitative approaches, such as ethnographic and hermeneutic, as well as associated data collection practices, including participant observation and depth interviews, allow for informant inclusion in the research process.

First, ethnographic research goals and procedures are particularly suited to foster inclusivity in the research design, as the aim of this type of research is to understand a ‘culture sharing group’ of people (Creswell and Poth, 2016). Through participant observation and other procedures, ethnographic data collection approaches that often include prolonged engagement with the population in the field add inclusivity to a study. By meeting informants in their environments, research takes place where they feel most comfortable. Additionally, member checking offers one avenue for providing participant access to at least some results and/or outcomes of the research. By offering up something of value, researchers can not only learn more about the population of study but can wield a positive impact.

For example, in a study of social class hierarchies in North India, to gain access to informants, Vikas et al. (2015) participated in the village festivals, and the first author also taught village schoolchildren without charging a fee. ‘Since most of the villagers aspire to educate their children, they perceived his effort as a welcome offering to the entire village. This helped us to gain access at a deeper level’ (Vikas et al., 2015, 478). Methodological practices such as this assist in fostering inclusivity, building rapport and reducing informant anxiety about the study.

In their investigation of politicized identity projects, Maciel and Wallendorf (2021) engaged in an ethnographic study wherein the author describes becoming a buddy researcher (Snow et al., 1986), or a researcher who behaves as a friend but maintains professional distance. In addition, the authors’ methodological procedures involved multiple layers of data collection and analysis that included: experiencing through participant and online observation, inquiring through long interviews and contextual survey, and examining through archival data and confirmatory observation. This prolonged engagement, necessary to understanding the population, reduced the likelihood of researcher intrusion.

Second, hermeneutic research goals and procedures also encourage inclusivity in research design. A hermeneutic approach emphasizes how the subject-population relationship may be bridged by an interpreter engaging with the ‘other’ through a reading that is grounded in, but not determined solely by, the interpreter’s preunderstanding (Arnold and Fischer, 1994).

For example, McAlexander et al. (2014) outlined two key hermeneutic principles that guided their research, namely preunderstanding and dialogic community. Preunderstanding reflects the extent to which ‘the interpreter and that which is interpreted are linked by a context of tradition – the accumulation of the beliefs, theories, codes, metaphors, myths, events, practices, institutions, and ideologies (as apprehended through language) that precede the interpretation’ (Arnold and Fischer, 1994, 56). Researchers must advance their understanding by engaging with the population, in their case through participant observations and in-depth interviews. Then, through fielding and analyzing data, the research team formed a dialogic community (McAlexander et al., 2014). As Arnold and Fischer (1994, 57) explain, ‘a dialogic community shares [pre]understanding mediated through language. The community is characterized by a sense of collective identity and by voluntary participation in purposive social action.’ This collaborative research design recognizes the agency of informants, fostering meaningful, active engagement and dialogue and ensuring that the voice of the population remains central to the research process.

## NAVIGATING POWER IMBALANCES IN INCLUSIVE MARKETING RESEARCH

Several methodological procedures employed in the reviewed studies focused on mitigating power imbalances resulting from historical, social and structural inequalities that influence the dynamics between researchers and diverse populations. Managing researcher positionality plays a crucial role in this process, involving an understanding of the fluctuating agency between researchers and informants, the researcher's dual role as both an insider and an outsider, and the delicate balance required to integrate into a context while respecting its boundaries.

Crockett (2017) discussed these issues in his study investigating the management of racial stigma. He recognized that being a member of the Black middle-class himself facilitated entrée with his informant population. However, he noted that his

status as an interloper and stranger inquiring about their middle-class status allowed (him) to ask about the commonly taken for granted. It also at moments engendered apprehension. Although everyone tried to be helpful, some potential informants would not sit for a formal interview, preferring to speak only conversationally. (Crockett, 2017, 562)

This highlights the fact that participant agency includes the power informants have to exclude themselves from the research.

We believe that a fundamental objective of this research approach is to prevent researcher intrusion, which we refer to as an unwelcome presence created within the community or population through informant mistrust or unacceptable research practices. Distrust in research with diverse populations in some cases stems from a history of discrimination and exploitation. Many underrepresented communities mistrust research, and worry findings will be used to reinforce negative stereotypes about their population or will expose them to unnecessary risks (Scharff et al., 2010). To navigate distrust, it is crucial for researchers to avoid researcher intrusion by demonstrating cultural sensitivity, respect and transparency in their engagement with diverse populations. Researcher intrusion can be avoided by emphasizing advanced participant involvement, agency and access.

Researcher intrusion may also occur when research is conducted on a population without their consent, or when people in the population of study feel compelled to participate with limited choice (e.g. reduced participant agency). Thus, it is essential to consider the ease with which individuals can opt out from, or decline to participate in, the research. Differences between individuals who accept research invitations and those who decline them often lead to the exclusion of certain people from research participation. Notably, those who are more socially active or frequently involved in community interactions tend to be overrepresented. Unfortunately, this implies that the voices of underrepresented individuals are often overlooked and neglected across research contexts.

## INCLUSIVE BY CONTEXT: THE ‘WHO’ OF INCLUSIVE MARKETING RESEARCH

This next section focuses less on what inclusive research is or how researchers conduct it, and more on who the informants are in inclusive marketing research. As was mentioned previously, a study is inclusive by context when it explores phenomena within an underrepresented, overlooked or poorly understood population. In their DEI review of the *Journal of Consumer Research*, Arsel and colleagues (2022) incorporate work that focuses on the experiences of populations situated at less privileged locations along axes of difference such as race, gender and class. Thus, inclusive marketing research incorporates the lived experiences of groups of consumers that experience marketplace exclusion, stigmatization, discrimination or even mistreatment over a lack of understanding of their identities.

For example, Bone and colleagues (2014) identify the ways minority consumers experience marketplace exclusion and discrimination via restricted choice when attempting to access financial services. Historical and sustained racial bias and exclusionary treatment (RBET) in the marketplace has created different patterns of experiences among racial and ethnic minorities (Pittman, 2020). Inclusive marketing research approaches are necessary to rebuild trust among racial and ethnic minority consumers, understand the ways RBET creates qualitatively different marketplace experiences among such consumers, identify how RBET contributes to both short- and long-term impacts on consumer wellbeing (Geronimus, 2023), and highlight paths to destigmatization (Crockett, 2017). Inclusive marketing research approaches are also helpful in understanding the experiences of consumers who feel misunderstood and even mistreated due to stereotypes and cultural devaluation of their social identities. Examples include the stay-at-home fathers in Coskuner-Balli and Thompson’s (2013) study or the knitters in Maciel and Wallendorf’s (2021) study. This underscores the significance of acknowledging inclusion by context, as typical considerations of research inclusiveness revolve around who is being researched or affected by the research.

In marketing more broadly, the civil rights movement, feminist movements, lesbian, gay, bisexual, transgender, queer, plus (LGBTQ+) civil rights movement, and other social movements in the twentieth and early twenty-first centuries played a crucial role in challenging existing power dynamics, urging marketers to recognize the existence of diverse populations, and demanding equity and equality under the law. This prompted a shift in research methodologies, emphasizing the importance of cultural sensitivity, authenticity and inclusivity of previously underrepresented populations in the research process.

Consider African Americans, who represent a consumer market estimated at \$1.2 trillion in purchasing power in the US (McGirt, 2018) and who influence and set market trends through consumption practices and cultural displays (Pittman Claytor, 2019). Despite the importance of this market, a research study found that less than one percent of all articles published in the top marketing journals focus on African American consumer experiences in the marketplace (Pittman Claytor, 2019). Further, much of that research was written nearly 50 years ago, suggesting that an understanding of contemporary experiences or theories of racism are outdated and underrepresented. Thus, the exclusion of consumer experiences of particular racial groups persists in marketing research and contributes to the idea that Whites are the default subject of this research (Burton, 2009; Davis, 2018). Historically, this exclusion has resulted in a White middle-class identity that serves as the advertising industry’s ‘unmarked signifier for the average American consumer’ (Rosa-Salas, 2019, 21). The unspoken standard, or Whiteness

norm, within academic discourse is problematic considering the impending demographic shifts resulting in the White population no longer being in the majority (Pittman Claytor, 2019). Thus, it is important to recognize the significance of the context, or who is being studied, in addition to how we go about conducting the research inclusively.

Since the beginning of the LGBTQ+ civil rights movement in the mid-twentieth century, there has been an increased acknowledgement of members of the LGBTQ+ community and ‘the \$1 trillion blindspot’ they represent in the marketplace (Kantar Consulting and Hornet.com, 2018, 1). The community is made up of diverse sexual (e.g. gay, lesbian, bisexual, queer, etc.) and gender identities (e.g. trans, nonbinary, queer, etc.; Oakenfull, 2021), yet scant academic marketing research exists on these growing consumer segments. As a result of this growing diversity, the ways we conceptualize a population of study, such as the LGBTQ+ community, and even the words we utilize to describe them have shifted over time. These changes have implications for researchers; such changes necessitate taking a more inclusive approach.

Regarding gender, for example, asking others for their pronouns and not assuming their gender identity has grown in cultural importance. Feminist researchers have long instituted the practice of allowing informants to choose their own pseudonyms for the research project (Reinharz, 1992). This practice allows the informants to have buy-in to the research process as well as agency over and authenticity in how they are presented in outputs of the research. A promising extension of this practice is to ask informants for their pronouns and incorporate them into reporting on informant demographics, while building in safeguards to protect informant anonymity and confidentiality (see McKeage et al., 2018 for an example).

Regarding sexual identity, researchers can (and should) allow informants to define their identity on their own terms, as opposed to asking informants to select one option from an outdated set that most closely aligns with their identity (i.e. gay, lesbian or bisexual). For example, consumers who can experience attraction to more than one gender may label their identity as ‘bisexual’, or one of many other terms, or choose no label at all (see Nappier Cherup, 2020, for an example). Consumers continue to (re)define their gender and sexual identities, and researchers must acknowledge this diversity and rapidly changing context. Inclusive research approaches offer ways for qualitative marketing researchers to move away from considering such identities as binary (sex and gender) and narrowly categorical (sexuality) variables. Inclusive qualitative research approaches in marketing allow researchers and informants to come together and produce research that is more authentic to the informants’ identities and lived experiences. Practices like these are more important when studying underrepresented, and often marginalized, populations because they offer some agency to informants in the research process and preserve informant authenticity and voice.

## CONCLUSION

Thus far, this chapter has focused on defining inclusive research, understanding the process of conducting inclusive research that engages participant involvement, agency and access, and the importance of evaluating the context, or ‘who’ is affected by inclusive research. Yet, we also need to think about the circumstances or when following an inclusive research approach may be useful for scholars to pursue. As we conclude, we offer a few recommendations and

questions to consider when evaluating and expanding the usefulness of an inclusive research approach.

Our first suggestion is that researchers think about who they might be including or excluding in their initial study design, and why. Is this inclusion or exclusion intentionally based on the research question(s) and focus, or is it merely by default (that is what other researchers have done) or based on convenience? In today's diverse marketplace, is the mix of included or excluded informants logical? What could the excluded potential informants add to the study? If the targeted informants make sense given the context and access, then the researcher should be prepared to state who was included and why in the methodology section, and note who might have been excluded in the limitations or opportunities for future research.

Our second suggestion is for researchers to think not only about what level of collaboration is necessary and helpful to the research, but whether additional levels of collaboration could benefit both the researcher and the informant population. The resources of the researcher in terms of the financial and time costs would be key in this consideration, but the researcher should also evaluate the incremental costs versus benefits, both short- and long-term, for the researcher and the informants, of moving to that next level of collaboration. Researchers bring methodological tools and rigor, but they also need to ponder what informants bring to the table besides their data. Within the population being studied, can informants better help the researcher understand whose voices are being centered, and where researchers should be focusing their attention, and on what phenomena?

This may require a shift in researcher mindset from me or us as researcher experts versus you or them as passive informants, to a mindset of *we*. How can *we* work together to better understand the population, develop the 'right' research questions, answer those research questions and share insights to multiple audiences within academia and the wider population? Stakeholder audiences include members of the informant population and others whose actions may impact the informant population (such as marketers, business leaders, policy makers and activists). This sharing of insights often involves going beyond publication in a top academic journal as the end goal, as the researcher reflects on what other outlets would be appropriate to share gleaned research insights. What actions need to be taken as a result of those insights? What actions should not be taken or should cease? What else can the researcher do to assist the informant population and the broader community?

In essence, inclusive research is about ensuring that the successful culmination of the research project results in a win-win for all parties involved, researchers and informants.

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## 4. Fielding ethnographic teams: strategy, implementation, evaluation and prospects

*John F. Sherry, Jr.*

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### INTRODUCTION

Despite the heroic view of ethnography as a solitary pursuit by a maverick scholar, the enterprise has long been conducted as an extreme team sport. The holism espoused in data collection and analysis is often most effectively achieved by a group, rather than an individual. Arguably, even individual fieldwork and interpretation are best served by a multiphasic, extended self in constant conversation with that internal voice comprising the portfolio of literatures that guides the hermeneutic tacking that is the ethnographic quest. Remember, as Whitman observed, we contain multitudes, and this introjection of mentors and nemeses disposes us by nature to be team players. How much more interesting, productive and challenging to shift from psychodrama to actual teamwork in contemplation of consumer behavior.

I have written this chapter as an essay to reflect my personal experience of ethnographic teamwork and to offer some friendly advice to readers capable on their own of sourcing material on ethnographic methods and perspectives. While I have appended a few references to this chapter, my intent in these pages is practical rather than philosophical.

I have worked in ethnographic teams for over five decades across a range of countries, marketplaces, industries, categories and households. I have developed strong preferences and biases in the conduct of this work, many of which I share in this text. Principal among these, beyond the achievement of substantive understanding and the sheer enjoyment of the experience of fieldwork, is that the goal of any ethnographic undertaking is the acquisition and honing of portable skills. Insofar as ethnographic success is dependent upon the efficacy of the researcher as instrument, the cultivation and refinement of intraceptive intuition, as well as the expansion and deepening of the clinical repertoire, are opportunities and obligations resident in any field setting. Teammates are a powerful catalyst for professional and personal growth. Reverse mentoring has become an especially valuable practice. Thus, every team outing is a peripatetic seminar, whatever else it may accomplish.

In the following pages, I describe ways of selecting, building and maintaining an ethnographic team. I discuss the intricacies of managing group fieldwork. I develop a template for the interstitial strategy sessions that informs ongoing ethnography. I propose a framework for orchestrating interpretation as it emerges over the course of a project. I offer suggestions for crafting written accounts that capture the team's understanding of focal phenomena. Finally, I consider options for using the current team project as a platform for future endeavors. For convenience's sake, I write from the perspective of the Principal Investigator, the coach whose task it is to lead by example as an integral member of the team in both field and library.

## SELECTING, BUILDING AND MAINTAINING A TEAM

The success of any team ethnography depends upon the capabilities that group members bring with them and develop during the course of a project. In successful teams, these capabilities quickly become synergistic, inspiring group members to ever greater technical precision and ever more nuanced interpretation. For example, a teammate using an ethnic lens and an interest in social class in conversation with another teammate using a sportsman's lens and an interest in racial 'stacking' in professional sports produce a more dimensional account of sales floor behavior in a contemporary sports bar than either researcher alone might accomplish. Properly motivated, each team member becomes a coach in their own right, steadily raising the ante for contribution as the project progresses. Healthy competition informs any vital collaboration.

I recruit team members on the basis of several criteria. While most of these criteria are functional in nature, there are several that are more appropriately described as expressive in character. I begin this recruitment discussion with a consideration of the latter, to emphasize the importance of what might otherwise seem to be fairly trivial issues.

As I believe social scientific research to be at base a self-indulgent hedonic undertaking, the lived experience of *doing* research is important to me. I prefer to work with people whose company in the field I enjoy for more than the clinical expertise it provides, and whose engagement in hermeneutic discourse I enjoy more for the intellectual playfulness it liberates in me than in the brilliant insight it brings to bear upon a problem. Thus, a sense of humor, an appreciation of the ambiguities of social life, a willingness to achieve (in Burke's phrase) perspectives by incongruity, a work hard/play hard ethic, a tolerance for quirkiness, and a deep commitment to a common goal I find essential in a congenial teammate. Team ethnography is as much about family dynamics as it is corporate dynamics. Researchers are not just a work group, they're a play group as well. Insight often arises from the ability to play well with others. Riffing and ripping on one another are among the joys and strengths of ethnographic writing.

Clinically, I select team members on several dimensions. Chief among these is problem-focused expertise. I find it helpful for at least one team member to have research experience grounded in the focal phenomenon. This helps the team come up to speed more quickly in the literature search and evaluation, and facilitates access to informants earlier in the game. This particular team member may actually be a 'nonprofessional' key informant discovered in the prospecting phase of the inquiry, whose 'research', however informal or non-systematic, may be so thoroughgoing as to provide an anchor in the beginning, and a sounding board throughout the project. As we reposition the role of informant to one of consultant, such cross-sectional collaboration will become increasingly common. Ethnographers have always employed natives as researchers in their own right, whether in collecting aboriginal oral literary texts or photo/video documentation of contemporary New Age rituals. As consultants and peers, natives may even require proof of the researcher's professional identity before collaborating. I have been asked by citizens of Burning Man's Black Rock City to produce my anthropological union card (my AAA membership credential) before they would consent to an interview, in which subsequently they would hold forth on topics and literatures as competently as an Oxford don, enriching my understanding of the phenomenon and its hermeneutic context, before referring me on to other prospective occasions of enlightenment.

Methodological complementarity is another important recruitment consideration. While most ethnographers imagine themselves to be generalists, many likely rely on go-to techniques with which they feel most comfortable. Keen observers, game participants, flexible

moderators, subtle and tenacious interviewers, precise surveyors, sensitive projective analysts, accomplished photographers and videographers, and vigilant project managers should all be represented on the team, if not instantiated in individuals. Techniques more orthogonal to traditional ethnography – experiment, LISREL modeling, CAT scanning and the like – are more commonly being brought into the tent. Others will surely follow. Complementary skills abet the partnering of teammates to greater effectiveness.

Disciplinary diversity is a fellow traveler of methodological complementarity. An interdisciplinary perspective of the focal phenomenon leads to a deeper interpretation and a proliferation of managerial implications. Anthropologists, sociologists, political scientists, educational specialists, psychologists, ergonomicists, narrative analysts, historians, religious studies scholars and a host of other specialized disciplines have long incorporated ethnography into their folds. Other disciplines that have either not yet or only recently embraced ethnographic methods are usefully involved in the interpretation and analysis phase of team projects. A devotion to holism, however, can devolve quickly from synergy to faction fighting, if the negotiation of interpretations becomes a zero-sum game. Confrontation is an expected byproduct of high-energy analysis, and must be managed to help integration triumph over schism, as Victor Turner might imagine it. Keeping a team agenda foregrounded, emphasizing the prospect of multiple papers, and charging all researchers with stewardship of the stream are ways of encouraging cohesion.

Demographic heterogeneity is a final criterion I invoke during recruitment. I have found it most helpful to assemble teams whose members vary by age, gender and culture (whether national, ethnic, regional, etc.). This variance encourages greater diversity in sampling in the field, and produces a wider array of insight in the analysis and interpretation phases of a project. Properly motivated, diverse teammates inquire into one another's perspectives, intuitions, assertions and assumptions, treating their collaboration much like a field site and mirroring techniques employed in the current project.

Team building requires the Principal Investigator (PI) to pitch the project to prospects in a way that highlights the opportunities for both distinctive and holistic contributions, and holds out the promise of an almost acephalous governance structure of project management. Each teammate is apprised of everyone's indispensability, collegial equality and reciprocal obligation; the PI assumes the role of player-coach. Unlike the legendary herding of cats and confederacy of dunces, the team is a committee everyone has enthusiastically joined, and is ostensibly amenable to the wise counsel and unstinting example of the PI.

Obligations, expectations, timetables and deliverables are negotiated at the outset, and revisited throughout the project, given the emergent nature of ethnographic research. I try to assume the role of focus group moderator, building consensus and commitment by constantly polling and clarifying teammates' positions, and catalyzing forward movement by continually exploring the implications of current findings for future fieldwork. Helping each group member achieve greater instrumentality (in the sense of intrateptive intuition) throughout the project, and thus potentiating teammates' growth as well, is the key to group maintenance. Like creating a sustained nuclear chain reaction, the coach encourages the released energy of each individual to energize the group. Project beginnings and endings can sometimes be arbitrary and mechanical, sometimes reasoned and organic. I imagine such demarcations to be clinal zones in the polyvocal conversation researchers conduct with one another, but when tenure clocks and client deadlines are winding down, the team has got to make the trains run on time.

## MANAGING GROUP FIELDWORK

Fielding an ethnographic team is both an antecedent to and consequence of recruitment. Before I begin a group project, I request that each of my prospective teammates visits the field site on a solo reconnaissance exercise. A preliminary walk-through (or series of initial visits) contextualizes the problem for group members, and gives each an initial, tangible sense of the contribution one stands to make and of the fun likely to be had. Once the team is recruited and introduced, I encourage another solo walk-through, to allow for projective fantasies of collaboration and grist for the marketing imagination that will be engaged at the next team meeting.

At the initial group assembly, I facilitate open-ended discussion of first impressions of the context, the problem, preliminary minimal parameters, potential sources of theorizing, and prospective managerial implications. This discussion is geared to generating enthusiasm and camaraderie, rather than systematic, comprehensive insight. Teammates introduce themselves and speak briefly of their backgrounds and motivations for involvement in the project. Then I turn directly to a logistical overview of the project, a template I expect the group to modify as the project unfolds.

I project a schedule of the enterprise that identifies key dates for obtaining ethical clearance from an institutional review board, arranging permissions to inhabit proprietary sites, completion of sampling objectives, data archiving and sharing, progress reports, strategy sessions, draft writing, member checking, and final document and/or presentation preparation, again allowing for the emergent character of ethnographic research. I encourage the team to inhabit the field site with an immersive blanketing Geertz (1998) has described as deep hanging out. I set up a timetable to achieve pervasive coverage of the phenomenon to the extent possible, with teammates committing to particular times and dates of participation. Schedules are set so that everyone logs field time as individuals and as members of dyads and triads (and on rare occasions, population density permitting, even larger groups). Awareness of this schedule makes it possible for individuals to undertake additional ad hoc fieldwork without impacting the habitat.

I work rotations with everyone on the team, so I am able to assess core competencies and deficiencies, monitor potential conflicts, and suggest compatible group pairings. I request each team member to work a rotation with every other team member, to help insure complementarity, redundancy and state-dependent learning. By projects' end, everyone has worked a site with everyone else, and reaped the benefit of procedural and clinical instruction from everyone as a result. Polishing diamonds with diamond dust, as my own mentor advocated, the team teaches itself.

Interspersed with scheduled fieldwork are days devoted to strategy sessions. As ethnography involves constant tacking between field and library, and constant comparison such that data collection and analysis are inextricably intertwined, it is imperative that teammates discuss findings on a timely, regular basis. This requires preparation of epic proportions, since teammates must be familiar not only with their own field notes, but with those of everyone else as well. Early strategy meetings involve data sharing and the workshopping of methods and techniques, as well as habituation of teammates to one another's work styles. In initial meetings, I both elicit and model tentative interpretations of current findings, laying down the template for the negotiation of understanding that will ensue in later weeks. Early sessions contribute primarily to team building and maintenance, so it is important to engage all team members in discussions, as tentative as contributions may be.

As the project evolves, strategy sessions deepen as well as broaden in their scope. A division of labor is negotiated that involves player-controlled environmental scanning, information brokerage, and selective sharing of external readings. That is, each group member identifies a literature (both scholarly and managerial) of prospective theorizing, digests it for relevance, and brings a summary to the attention of the group. This broadens the team's perspective by tapping individuals' diverse interests. Simultaneously, each group member searches for compelling linkages to current and traditional disciplinary concerns. Because ethnography is a grounded theory enterprise, researchers can only sift a literature for potential relevance, bracketing their insight as they return each time to the field. By apprising teammates of relevant insights from various disciplines throughout the project, everyone's intellectual peripheral vision is enhanced (Zaltman, 2000). Thus, a retail spectacle focus may morph from an emphasis on cultural construction and ludic agency into a concern with kinship dynamics, and thence into a treatment of heroic feminism, as teammates blanket American Girl place over the course of several volumes of top-tier journals.

Hand-in-hand with literature sharing goes protracted discussion of cumulative findings. I model the proposing of interpretive themes from data, elicit contributions from the group, and work on constructing an exhaustive inventory of themes as the project emerges. The group quickly learns to negotiate interpretations, challenging and supporting views from data collected individually and communally. Early strategy sessions conclude with interpretive summaries of procedural and substantive learning, and a set of action steps to be accomplished prior to the next meeting.

## ORCHESTRATING INTERPRETATION

Then, as the shampoo label advises, 'lather, rinse and repeat'. Group members revolve from field to library, with past learning modifying current findings, which in turn guide future inquiry, until the team either achieves saturation and redundancy in its results, or encounters the limits of its clinical ability to elicit additional insight. At this point, the current project is tentatively concluded, and becomes a platform from which additional projects may be launched. Pending discovery of holes in the archive during final rounds of analysis and interpretation that might require additional data collection, fieldwork is suspended and the team convenes in the library for the winnowing work of interpretation.

Throughout strategy sessions, I revisit the inventory of emergent themes, soliciting both champions and devil's advocates for each of them, so that every team member is engaged in a constant contestation of our principal findings. This contestation produces penetrating and systematic discussion, which greatly enhances the coding process. I have used Spradley's (1980; 1997) developmental research sequence and Strauss' and Corbin's open/axial/selective process (1998), both in isolation and in hybrid formats, to guide coding; but any coding scheme selected will only be as good as the processed data upon which it is overlaid. That is why the contestation during strategy sessions must be so vigorously encouraged. This hermeneutic cycling of insight within the group sets the stage for the ultimate coding.

Once the team is comfortable that all the major themes have been identified, we begin the process of segregating, aggregating and integrating the themes into storylines that will eventually become narrative arcs for manuscripts. This winnowing process mirrors the fieldwork enterprise, insofar as we work as individuals, dyads, triads and complete group,

in part-to-whole fashion, in the reduction of our findings to manageable and compelling proportions. I've found it useful to work in conference rooms where the team has access to chalkboards and whiteboards, VCRs and computers, easels and sticky notes, and all of its data simultaneously, so that the built environment facilitates group process. When the group has tangibilized its understanding by getting its knowledge into the world, it can return to the field with discrete insights and elicit commentary on them by key informants. Member checking may or may not add additional grist for analysis, but it serves both as a reality check of sorts and as an ethical debriefing for participants in the study. Then, the serious work of writing is ready to be undertaken.

## WRITING, REPRESENTATION AND VOICE

Even (or especially) after 50 years of fieldwork, I find the parsing of findings to be the most difficult challenge I face as a consumer researcher. Ethnographers understand the fabric of their focal phenomenon to be of a piece, and chafe at the notion of a JPU (the infinitesimally incremental 'just publishable unit'). As an anthropologist, my inclination has always been monographic. My preference is to write up my analysis as comprehensively as possible, to capture the phenomenon as holistically as I am able, in one fell swoop. This tendency is dysfunctional in a field that values concise journal articles to the exclusion of other formats. I struggle mightily as a writer to produce accounts that amount to a mere 60 pages, which I find unbearably concise.

Imagine collaborating with other like-minded souls on a common project. A team ethnography might easily be expected to yield a document running to several hundred pages. Such a product would be fit to export to contiguous disciplines that value books, but, for junior professors, it is merely a white elephant impeding their progress toward tenure. Cognate articles are the holy grail of team ethnography. At least until senior scholars convince personnel committees that quality trumps genre and that style is substance.

Once a project has been running long enough to provide a glimmer of the focal phenomenon's minimal parameters, I ask group members to think about the kinds of outlets that would be amenable to prospective findings. Given the distinctive positionings of journals in our discipline, it is convenient to imagine the kinds of stories that might be told for particular audiences. Compartmentalizing findings by streaming during the research process also makes it simple to avoid idioplagicizing during the write-up phase, as the data set will be large and distinctive enough to be parsed over several publications with no duplication. As a PI with a big-picture perspective, I find it most helpful to work with teammates who have a more granular view and an appreciation of the discrete contributions to be made by particular components of the larger project. This interplay of perspectives makes it possible to plan for a series of articles fairly early during fieldwork. Just as philosophy of inquiry and team composition help ensure informant voices are authentically represented in interview verbatim and field note, so also must the PI work to ensure that teammates' voices resonate genuinely in the write-up.

Armed with a sense of what the group thinks is possible and reasonable, I outline the projected contribution by journal, and elicit ramrods for each manuscript (or sections thereof), whose charge it is to develop the nucleus around which the article will eventually be written. As drafts emerge, they circulate within the group for discussion, elaboration, clarification and, sometimes, outright argument. As in other stages of research, each group member brings

particular skills – eloquence, theoretical sophistication, concision, diplomacy and so on – to the crafting of documents that ultimately result in a manuscript draft ready for final editing.

Penultimate drafts face rigorous internal peer review, as well as more informal external peer review (via invisible colleges in which team members participate), before the decision is made to submit the manuscript to a journal. To prevent the draft from reading as if it was written by a committee, teammates delegate an editor(s) to harmonize the voices as closely as possible. In some cases, the voices may actually be amplified, if discordant notes serve a representational purpose. As opportunities arise and talent permits, individuals might even render insights in poems, short stories and other artistic genres.

Diplomacy and grace must be cultivated and practiced among teammates at this stage, as everyone has a large stake in the outcome. It's one thing for official journal reviewers to call your baby ugly; it is quite another when you are encouraged to take one for the team by sidelining your own brilliant ideas or prose. Here, the willingness of the PI to sacrifice as an exemplar is most effective. For example, I might reprioritize my set of themes, curtail my interpretation, or alter my rhetoric. Equally effective is the practice of cultivating a team *bricoleur*, who tries to ensure that anything left on the cutting room floor is recycled into yet another manuscript (or stimulus for a new project). A team study of ESPN Zone Chicago foregrounding gender as its initial issue of interest produced more theoretically compelling possibilities as it emerged, pushing a systematic treatment of gender to the periphery of early manuscripts; insights eventually were culled from these textual backwaters to create a stand-alone account of an issue the team was reluctant to abandon (Sherry et al., 2004). Finally, the negotiation of authorship order on the final manuscript should be public and decided by consensus. My rule of thumb has been to use alphabetical order in the case of equal contribution, and to rank authors by ramrod status in cases of communally-determined imbalances of contribution. Crucially, it should be communicated to the team that author order may often be readjusted during the revision process.

Once formal peer reviews are received and a revision is requested by the journal editor, the team handles the rewrite in the same manner as it negotiated the strategy sessions. Changes are agreed upon, additional data may be collected, theorizing may be reconfigured, and a ramrod shepherds the process to a revised manuscript. Outtakes and promising but unaccommodated reviewer suggestions are managed by the *bricoleur*, in the event that additional manuscripts might be produced. I describe several multi-manuscript adventures in the next sections.

## LONGITUDINAL TEAM PROJECTS: AMERICAN GIRL BRAND

Serendipity precipitated one of the most interesting team projects in which I have participated. A manuscript reviewer lamented the dominance of male-centered spaces in the servicescape literature, and speculated that a look at female-centric spaces was well worth taking. While beyond the scope of the revision at hand, I resolved to explore the issue in a future project.

After several false starts at other venues, and marveling at the perfusion of red American Girl shopping bags in greater Chicagoland area streetscapes, I followed the artifact back to its source one afternoon and was astounded at the rich research possibilities posed by the flagship brandstore. I rushed into conference with several like-minded colleagues to brainstorm a project.

We soon discovered that another team of local researchers was also considering the store as a field site. We agreed on a merger, and fielded a multigenerational team of domestic and international partners, including nonparents, parents and grandparents, whose marketing perspectives were seasoned by other social scientific and humanistic viewpoints, to conduct a multi-year study of the brand. The composition of the team mirrored the dimensionality of the servicescape, resulting in a more comprehensive investigation than a solitary researcher might manage.

Post-project, a subset of our hybrid team used the experience to synergize their inquiry into a complementary global flagship brandstore in Shanghai, thanks largely to one member's timely sabbatical. A carefully cultivated network of talented globe-trotting colleagues can be a catalyst to projects that a solo inquirer might not have the awareness, imagination, boldness, reach or resources to undertake on their own.

## TRAINING AND COLLABORATING WITH STUDENT TEAMS

Following a precedent established by Wallendorf and Arnould (1991), I have enjoyed training and working with student teams in pursuit of ethnographic knowledge. Students have served as apprentices on several projects leading to publication, such as a longitudinal study of North American tailgating (Bradford and Sherry, 2015) and a shorter-term study of North American bridal (Bradford and Sherry, 2013).

In the former case, I recruited undergraduates from marketing (with double majors in the social sciences and humanities for perspectival diversity) to enroll in my graduate qualitative methods course, where they learned a battery of techniques and analytic frameworks in the context of a field study they designed and executed, and which they presented in rolling debrief fashion to other student teams in the class. After close supervision in the pilot study, the team undertook a targeted investigation in collaboration with me and a colleague as Principal Investigators, where they were able to refine and extend their skills. This investigation was a multi-year project involving a number of teams. In the latter case, a methods training project begun with a doctoral student team later morphed into a collaborative study into whose regime just a single student was inclined to continue, as other interests had claimed the time and attention of the rest in the interim. She became Co-Principal Investigator and ramrod of the follow-up studies.

In each of the cases, distinctive skills were added to participants' professional portfolios, and they were cited in subsequent publications for their invaluable contributions. And I wound up with an extremely accomplished and highly motivated long-term co-author in the bargain!

## TEAMS IN AN ERA OF PHYSICAL ATTENUATION AND DISRUPTION

Advances in netnographic platforms and practices (Kozinets, 2019) as well as complications arising from catastrophes such as natural disasters and global pandemics demand that teams embrace the opportunities of virtual interaction with colleagues and informants. During periods of catastrophe and quarantine, virtual communication may be the only means of inquiry available to the team. These conditions may become ever more common. Acquiring

familiarity and facility with the wide range of netnographic methods during non-crisis times is both a present benefit and a hedge against future restrictions on physical access to field sites. Teams may opt to recruit a netnographic specialist, or distribute specific competencies across members; either strategy allows for skill-building among teammates.

What is sacrificed in the loss of immediacy of corporeal contact on social media sites may be partially offset by the merits of project continuity, distributed meetings, context-dependent insight elicitation, depth probing in virtual interviews and focus groups, and the networking of informants. Keeping in touch with informants is a huge benefit conferred by social media. The seductive convenience and comprehensiveness of archival records must be balanced with a creative search for occasions for observant participation. Deputizing informants to create digital accounts of their behaviors and experiences for subsequent joint unpacking is one such opportunity greatly enhanced by cell phone cameras and screen sharing technology. Finally, the visceral joy and entrainment of working and learning shoulder to shoulder must be approximated in the digital environment, an additional challenge the PI must incorporate into strategy sessions.

## WHITHER THE REGIME?

One of the pleasures of team ethnography, once all hands are rowing in the same direction, is the realization that everyone has a roving eye and is prone to sighting exotic new islands of research just off the main course. The lone ethnographer is accustomed to thinking of their own research regime in terms of rhizome or walkabout rather than a stream, and of following emergent interests as they present themselves. Amplify this nomadic questing by the current number of teammates and imagine how many side projects might delay progress on the focal group project.

I find it helpful to think of the current project as a platform for future research, whose outlines are dimly discernible at the moment, but promising nevertheless. Prospecting forays into this new geography are inevitable, but comprehensive exploration must await another day. I encourage teammates to keep a journal of these interesting prospects against the day that we get the band back together, or until fission and fusion among our ranks produce new coalitions of researchers and other teams. In this manner, research streams can be advanced ever more rapidly, and researcher enthusiasm can be greatly prolonged.

## CONCLUSION

Conducting ethnography in teams conveys some benefits that the lone ethnographer will find more difficult to reap. Teamwork allows for more ambitious projects to be undertaken. More comprehensive coverage of a phenomenon is possible with a group. Efficiency is an important benefit, with economies of scale and scope to be realized. Arguably, teamwork leads to more and deeper insights, in field and in library. For continuing education and updating of clinical and analytic skills, group ethnography is a powerful motivator. Finally, for the experience of collegiality, the sense of dwelling in a scholarly community, team ethnography delivers a *communitas* of the road that is difficult to replicate.

Graduate students in marketing are accustomed to working on solitary projects, often one-off exercises that flow from their advisor's research stream, the published result often co-authored with that mentor. This is a tag-team tradition at best, and does little to promote the rhizomatic, synergistic impulse of truly collaborative research. It is easy to imagine a joint project pursued by a team of doctoral students, whose output would be a set of dissertations comprising a mosaic of monographic proportion, reduced in turn to a discrete set of solo- and co-authored journal articles. Such an approach would deliver a learning experience to doctoral students of much greater power, intimacy and satisfaction than they are currently receiving. It would provide junior faculty aspiring to tenure a multidimensional coping mechanism, increasing their productive capacity and their resilience. The teamwork ethos is best laid down during graduate school. It is a challenge I hope some doctoral program will accept, and an opportunity I wish some academic department would extend.

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## 5. Representing consumer vulnerability through art forms

*Hilary Downey and Pilar Rojas-Gaviria*

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What we understand is intimately involved in how we learn it, while how we learn is intimately involved in what we come to understand.

– Amos (2019, 22)

### INTRODUCTION

This chapter takes the reader on a journey through an enabling artistic lens in straight contrast with the more usual enabling theories. This journey illustrates how the art form affects our embodied understanding of vulnerability, suggesting novel perspectives on our research. This journey will explore a small diversity of art forms and reflect on how their art represents contexts of vulnerability, capturing the attention of diverse audiences. Through the language of poetry, painting, theatre, photography and film, the chapter explores how consumer researchers navigate with wonder the terrain of the arts to amplify their understanding of vulnerability. In some cases, the researchers become art researchers when their curiosity leads them to try and practice some of these art forms. Within a myriad of different levels of artistry, experts and scholar-apprentices commune in these artistic spaces, bringing about new conversations to assist in understanding vulnerable spaces where lives have been restructured and reconfigured through the living of vulnerability.

Beyond elicited empathy and reflexivity, an artistic lens affords connections with those marginalized in society and creates the means to bring those lives in from the shadows to the light. In the following sections, we explore how these art forms can address various contexts of vulnerability. The sections draw on different geographical experiences to offer the reader innovative ways in which arts-based approaches have been used in consumer research to arrest and arouse wider stakeholder interest and elicit potential change within communities.

### POETICALLY PROPELLING VULNERABILITY

Poetic inquiry has made a mark within consumer research. From Stern's (1989) germination of advertising as a poetizing of consumer goods, a small and dedicated caucus of scholar-poets led by Sherry and Schouten (2002) reanimated the poetic pulse of the community, founding the annual CCT poetry book in 2010. Works by a dedicated cabal support the calling out of struggles, oppression and trauma encountered in research projects, finding a voice to enable reflection and capturing of lived vulnerabilities. In this sense, the empathetic vehicle provided through the auspices of poetic inquiry places the researcher-poet in the 'poet as witness' position, reflected in the words of Seamus Heaney:

‘poet as witness’ ... represents poetry’s solidarity with the doomed, the deprived, the victimised, the under-privileged. The witness is any figure in whom the truth-telling urge and the compulsion to identify with the oppressed becomes necessarily integral with the act of writing. (Heaney, 1988, xvi)

Putting down thoughts in poetic form can lead to fresh insights (Brown, 2020) and be a powerful medium for representing layered, nuanced, often invisible and unheard stories of marginalization. Poetry resonates with those seeking to build excluded voices emotionally and politically and invites activism and social transformation through an invitation to appreciate things otherwise (Reilly et al., 2018). As Denzin (2014, 86) notes, ‘The poet makes the world visible in new and different ways, ... is accessible, visible, and present in the text, in ways that traditional writing forms discourage.’ Researchers seeking new ways of disseminating their findings and who engage with social justice issues can use art forms to offer wider access to their ideas and initiatives outside of academia. The literary form, such as the poetic, provides an unconventional representational approach to disclosing vulnerability, which attends to the emotional. It nourishes social imaginaries, moving audiences with its emancipatory power into uncharted terrains.

To illustrate, Downey’s poetic inquiry to capture African American women’s incarceration experiences evolves from a context generally understood as the preserve of the man. Themes of distancing, silencing and masculinization recount women’s experiences of vulnerability, layered with citizens’ online commentary and the scholar-poet’s reflections. Concepts of gender, race and the incarceration experience were explored to capture critical moments, bear poetic witness (Canniford, 2012) and foster poetic expressions of these voices. Downey’s ‘Visual Incarceration and the “Other” Prisoner: A Poetic Inquiry’ (2021) calls out vulnerabilities experienced by the women and their need to retain an emotional distance from institutionalized structures, perceived as critical to the nurturing of a self, not a felon. A stanza, *Distancing of Self*, draws on a meld of incarcerated women, citizen commentary and researcher’s voice to craft a found and generated offering as potential for political moments (Edkins, 2022, 700).

The work of Rojas-Gaviria (2019; 2021) also speaks to those occasions that have evaded vocalizing, where wider audience appreciation and representation are warranted by poetizing the lived experiences of everyday and longer-term consumer vulnerabilities and the ensuing suffering in silence. She bases her work on identity in creation on ideas on the philosophy of poetry in which the meaning of the poetic in life is explored beyond the literary form of a poem. As Paz describes it: ‘there is also poetry without poems; landscapes, persons, and events are often poetic: they are poetry without being poems’ (Paz, 2013, 91). By looking at the poetic aspects of human life, we make space for representing the unpredictability and uncertainty embedded in our daily lives. Looking at the poetic aspects of life and consumption, one can appreciate that poetry has philosophical and theoretical value beyond the art form; it interrogates the core of our existence. An excerpt from Rojas-Gaviria’s (2019) poem, ‘Container Rose’, draws on emotional moments between patient and caregiver engaging with everyday objects to explore the notion of broken bodies.

In these two examples, the researchers crafted poem forms to bring to life the diversity of vulnerability-related tensions. The poems are not only published as stand-alone representations of ideas that escape the structure of a traditional marketing paper but also leverage the generative arsenal the researchers accumulate in their learning trajectories. Sometimes, this poetic practice passes unnoticed in other collaborations that do not make the role of poetry

evident. For instance, ‘Container Rose’ was written when the researcher worked on a team project studying how families balanced living with a diabetic child (Cardoso et al., 2020). The literary form acts as part of becoming a researcher by opening minds and hearts, not only of audiences but also of researchers themselves. The poetic form can, for instance, be an embodied preparation for data collection (Rojas-Gaviria and Canniford, 2022).

## FROM BRUSHSTROKES FALL VULNERABILITY

Public art encountered in daily surroundings has ignited wider interest in accommodating uncomfortable aesthetics into the research toolkit, aware of the power that such offerings can bring to heighten experiences of hidden vulnerability. The visual arts are a conduit for expression and exploration, especially in unparalleled times. Ruptures in the fabric of life permit occasions that warrant marking. Consumer researchers are engaging in art-making also as a research inquiry to expedite their journeying in vulnerability, to open up fresh conversations, address challenges of health and veiled trauma, to attest to self and arrest engagement with wider stakeholders as to the transformative catharsis of such art moments. Bettany’s (2022) engagement with the arts seeks self-refuge and adopts artistic craft as a means of introspective inquiry to unpack this. Beyond any artistic ambition, Bettany seeks insights to extend our understanding of consumer vulnerability into the broader healthcare domain.

Strong palettes, blended with the adept hand of the artist, have unfolded a world of felt emotion through which the hue of color and tender brushstroke(s) across canvas has laid bare vulnerability. Deftly curated through artful mixing and remixing of tint, the catching of life struggling in the margins, beating relentlessly against tidal trauma, is arrested. In periods of conflict and disruption, artists’ strokes have sought to capture ingrained tensions in muscle and pallor, across faces etched in pain. The challenges tendered in the period of COVID-19, enabled consumer researcher Usva Seregina to create in her passionate oil strokes ‘*Faces of Isolation*’ (2022), an exhibition capturing tensions, struggles and emotional work caught in the faces of community members, sharing meaning across the human experience and the disruption of the pandemic. Self-expression delivered through portraiture, the basis of this arts-based research project, was fashioned as a way of seizing consumers’ experiences of living in pandemic times and offers the researcher and seer a means to facially arrest and align with how COVID impacted one’s ability to contend with the breaking down of society and of the lockdown that marched in its wake. The reader is afforded a sense of communing with trauma and mental health issues, which have affected society in different ways. Using oils as a medium positions the artist to reflect that diversity of vulnerability in the deliberate layering of paint on canvas, which catches light and dark effectively. The exhibition requires sitting for a portrait; where deeper understandings of lived vulnerabilities are unearthed through individual storytelling between artist and sitter. Such contexts illuminate isolation and loss for those who endure and experience them in their many representations. The time afforded to sittings allows the researcher and informant to engage in ‘sensuous momentarity’, defined as, ‘a point in time experienced in its full multisensory presence and associated layers of meaning ... or re-experienced in recollection elicited by the researcher’ (Sherry, 2021, 5).

Arts-based research allows consumer researchers new ways in which to become cloaked in vulnerability, enabling personal reflections of everyday sensitivities to surge through from creators to collaborators to facilitators. In this vein, Leighanne Higgins worked with those

living with disability and disability support groups and charities in the UK to curate artworks for the exhibition '*The Marketplace and I: Commercial Experiences of Disability Explored through Art*' (2022). This exhibition offers a public platform to showcase art expressions of vulnerability experienced by disabled consumers navigating the marketplace. It has been on travelling display, giving voice to the participants and raising awareness and understanding throughout society and the built environment. Higgins' curation of participants' created art enables researchers and communities to come together and reflect on the tensions between the sublime of art, its conditions of creation via disabled bodies and the implications for exclusion in the marketplace.

As demonstrated by the intimacy of the art creation in these examples, and in particular, Shona Bettany's very personal work (2022) on her journey through cancer, arts and crafts can be seen and used as emerging resources, guiding soothing and comforting discoveries, and as manifestations of essential moments of anguish and despair. It is within these episodic moments of catharsis, as Bettany defines them, that our research becomes personal and collective, not only touching the fabrics of our most profound humanity but also enabling our thinking and provoking new ideas and academic understandings.

## PLAYING TO THE GALLERY

The Transformative Consumer Research (TCR) community has been influential in emphasizing and furthering the goal of societal impact (Ozanne et al., 2017). Seeking to make a difference and transform lives opens up new conversations around vulnerability and how this can be addressed to effect change. New forms of expression of vulnerability delivered to diverse audiences can, for instance, create awareness of societal ills and marginalized populations who tend to get overlooked. Arts-based research has facilitated scaffolding for researchers exploring vulnerability, offering access to innovative forms of dissemination, hidden voices and representation. The relational engagement approach (Ozanne et al., 2017) is a key trajectory to broaden stakeholder involvement and transform lives. In this respect, innovative collaborations have emerged, where data collections are ceded to wider stakeholders with expertise to bring to life on the stage and illuminate the lived contexts of vulnerability.

The first example of ceding control to others stems initially from a traditional scholarly research approach – namely, in-depth interviews. The research project focuses on what is commonly known as the border, a geographical invisible line that demarcates Northern Ireland from the Republic of Ireland and stretches across some 300 miles. It is an area that experienced isolation, suffering and trauma over the conflict period (1968–98) known as 'the Troubles', almost one hundred years since the Partition of Ireland (1921). Witness to many atrocities and vulnerabilities, this context offered opportunities for two researchers to visit with cross-community dwellers with different religio-political identities over the summer of 2020. The research goal for this writer/actor partnership was to capture marginalized community voices representative of longstanding experiences of consumer vulnerability. Research partnerships with wider stakeholders (local theatre groups) were critical to the researcher-writers gaining community engagement (Ozanne et al., 2011). In keeping with a TCR agenda, adopting a relational engagement approach was essential to connecting with diverse audiences and opening up otherwise stifled conversations. For consumer researchers seeking to represent

consumer vulnerability, this example demonstrates, beyond more traditional means of amplifying vulnerability, an additional medium to obtain wider audience impact.

The collaborative efforts of wider stakeholders led to the creation of a play titled '*The Border Game*' (2021), written by Michael Patrick and Oisín Kearney, scholars in physics and politics from the University of Cambridge. Locals, with family connections along the border, the play stems from their research efforts, over the COVID period, to commune with locals who live on the frontline of volatility and firmly entrenched by the challenges during the 30 years of the Troubles, in Northern Ireland. The authors captured the voices of marginalization, division and struggle through interviews with 100 residents; these essentially became the basis of their theatrical script (Patrick and Kearney, 2021). The authors ceded control of their data to a local theatre company to perform. The performance first played at the Lyric Theatre as part of the 59th Annual Belfast International Arts Festival (Saturday 2nd October–Saturday 23rd October, 2021), then toured Ireland in 2022, exposing vulnerabilities of insiders and outsiders to cross-communities. The play, potent in its timing, presents a powerful reflection of life on the border and its impact on those living there. It marks the twenty-fifth anniversary of the Good Friday Agreement in 2023, signalling peace. In terms of Sherry's (2021) call for sensuous momentarity, this play is firmly attuned to ensure that ('Exciting New Work Explores 100 Years Living on the Border', 2021). A few reviews speak to the empathy aroused through this arts-based research delivery and illustrates the emotional engagement and cultural competence in which this play breathes (<https://michaelandoisin.com/the-border-game>).

The innovative way of expressing the fragility of these dwellers offers potential to heighten community engagement and to seek solutions to support vulnerabilities experienced by those whose stories have been muffled. The performative dissemination, compelling and demanding in its ability to draw audiences in, offers new ways of vocalizing, where other more traditional means of raising concerns have tended to go unnoticed. Such innovations are important to researchers bringing such vulnerabilities and sensitivities to the fore, where reawakening of interest and the capturing of empathy is ultimately of concern for wider communities.

## IN THE FRAME OR FRAMES

Homelessness is well documented in the literature (Hill, 2023; Hill and Stamey, 1990) and is a growing sign of the times we live. Homelessness is linked with higher rates of morbidity and mortality associated with chronic physical and mental illness and rates of substance abuse. Tobin et al. (2023) worked in a community-academic partnership with Back on My Feet, an organization in Baltimore that serves those experiencing homelessness. They used photo-elicitation interviews to explore how the homeless understood social interactions and activities offered by the organization. Participants were provided digital cameras to photograph what the organization meant to them; these were shown and discussed in meetings, delivered by participants in their voices. A public photo exhibition was created, displaying participants' photographs with supporting quotations to inform community partnership members and wider community about the vulnerabilities they experienced (i.e. mental health, substance abuse, suicide). The exhibit told the stories of how the partnership supports this vulnerable community by giving voice and nurturing self-esteem and confidence among the homeless to equip them to meet future challenges. A book of the exhibition photographs was distributed to encourage more comprehensive community support.

Scholars in marketing and consumer research are well-versed in photo-elicitation techniques (Heisley and Levy, 1991) and videography (Belk and Kozinets, 2005). Recently, the field has turned to the art of filmmaking to enhance awareness of and to arrest new conversations about perspectives of consumer vulnerability, all of which have implications on practice, impact and societal wellbeing. To illustrate, consumer researcher Stephen O'Sullivan (2022) reflects on his film production, a short film presented at the prestigious Indie Cork Film Festival in Ireland (O'Sullivan, 2020). The context draws on the struggles experienced in the early stages of lockdown and the chaos that walked its arrival. An important episode of sensuous momentarity (Sherry, 2021) captured on screen speaks to self, to selves, across communities and locales, who all experienced disruption together. The essay film explores the existential and ontological confrontation brought about by the pandemic.

TCR researchers Sonya Grier and Vanessa Perry's (2018) publication, '*Dog Parks and Coffee Shops: Faux Diversity and Consumption in Gentrifying Neighborhoods*', was based on the film (Grier and Perry, 2014) created by the researchers using mobile phones to capture participant voices. The film of the same name was the recipient of the 'People's Choice' Award, 13th Annual Association for Consumer Research (ACR) Film Festival. It is a testament to how engaging in arts-based inquiry to inject real-life experiences of vulnerability can contribute rich, insightful understandings to reach practitioners and offer actionable direction and collaborations going forward that will present opportunities to transform lives and deliver wellbeing.

Beyond these successes, looking outside the field at how qualitative scholars have leveraged the arts to illuminate vulnerability can offer important insights. For instance, working in volatile and precarious contexts such as refugee camps and with asylum seekers, scholars acknowledge art's broader role in expressing and processing experience. Murphy and Vieten's (2022) anthropological research has been complicated by widely-held beliefs underlying connections between arts, silence and the representation of displacement and loss. The authors have been sensitive to the anxieties of Syrian professional artists in Istanbul, who perceive their work as devalued by being known only as refugee artists. By attending to broader sociopolitical and economic spheres in which these artists operate, the researchers prefer to describe the refugee crisis as a border crisis, to attend to the sensitivities raised in their research. Understanding sensitivities has enabled the researchers to exhibit the artistic expressions and creativity of those eager to regain a community identity and overcome displacement and loss. The artistic is political, and recognizing the tensions surrounding artistic creation is a way to action visual arts to show us those tensions that often pass unnoticed. With the toolkit available within and outside the field of photography and filmmaking, the quest for consumer vulnerability research to achieve a more impactful impression in society and a more critical intake is a promising, under-construction pillar in consumer research and marketing.

## CONCLUSION

This chapter offers a brief tour through poetry, painting, play, photography and film to illustrate their importance and potential as enabling lenses for qualitative scholars researching consumer vulnerability. We extend the idea of enabling theories in assisting art forms and show how, with and through the arts, we can further develop theoretical insights and contribute to societal transformation. We hope that poetry and the wider arts-based approaches presented in this chapter will illuminate the thoughts and emotions of participants while synthesizing

one's 'experience in a direct and affective way' (Prendergast, 2009, 545). The journey across the different arts expressions, beginning with our section on poetry, offers the reader a glimpse into the scholar-poet positioning (Downey, 2022). Poetry enables reflections on participants' personal inequalities stemming from having to relinquish control to others. Additionally, enabling the rawness of voices to be captured accentuates that which has rendered them vulnerable. Poetry has enabled the nuances of vulnerability (Faulkner, 2018) to find voice (Baker, 2021) and to give prominence to that emotion (West and Bloomquist, 2015) in ways that further understanding and empathy. In marketing research, we find only a handful of examples of researchers collaborating with recognized artists. One case in point is Wijland (2011) who invites New Zealand poet Geoff Cochrane into his inquiry on poetic agency.

In illuminating the value of art to represent vulnerability, the intimacy of the storying takes flight through the occasion of the sitting, with researcher and participant at one in the moment (Crockett et al., 2013). The context of portraiture discussed here captures experiences discernible by suffering, loss and trauma – experiences where personal conflict elicits shared compassion for contexts beyond participants' control. This illustrates a move to explore vulnerability originating not only from a researcher position but also community practice. Collaborative art exhibitions make space for ambiguity, celebrate context complexity and allow multiple interpretations to flourish (Borhani, 2021).

Our discussion on creating theatrical experiences based on informant text brings the vulnerable focus into sharp relief, signalling to 'what is affective, potent, and essential' (Machado, 2017, 69). Again, vulnerabilities are brought to the surface through the efforts of many and witnessed through researcher-participant-practice collaborations that warrant revisiting painful episodes in history, whose legacies still haunt the everyday. The ability of performance to articulate the criticality of our times remains its power and pathos (Serpa, 2021). Relatedly, photography sings to the power of the visual in capturing engagement via scholarly/community partnership offerings, where participants perform their stories with self-photos, culminating in a public exhibition and photographic collation to prompt compassion and community awareness. For others, transitioning from page to film has facilitated a social justice research agenda to gain visibility beyond academia, enabling scholars to be recognized for covering essential topics pertaining to social equity, mental health and wellbeing. These works, therefore, resonate beyond the contexts in which they originated.

Researchers, expert artists, amateurs, apprentices of art forms, and audiences interlink in creating meaning beyond the classical narrative argumentation. The examples of representing consumer vulnerability presented in the chapter highlight some of the current efforts in the arts-based research space. They draw attention to the researcher-participant relationship and to how dissemination has embraced broader affiliations with practice. As we have highlighted, creating performative, visual or literary arts is typically a multi-authored journey. The expressive arts we showcase in this chapter provide an overview for would-be arts-based researchers to get a feel of what's out there, what vulnerabilities are addressed and which art format(s) could be most effective to generate meaningful and relevant research to different audiences. The concept of cultural competence plays a key role in realizing relevancy, where reliance is on the researcher/creator having ownership of cultural know-how to move these experiences from page to performance (i.e. poetry, art, play, photograph and film) if nuances of consumer vulnerability are to be grasped. Hopefully, those scholars working in the wider domain of vulnerability can gain inspiration and confidence to transition from the page, reach for the arts and support community capacity in the field. As we demonstrate, the journey through the arts

offers multiple paths, not only in terms of forms but also in terms of the level of implication in the craft itself. Collaborative endeavours, such as those illustrated, reveal that, although art-making can be intimidating, it is through inspiration and relationships that we can find strength and inner confidence to improve our arts apprenticeship and find talented research participants who can also be our gifted partners.

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## 6. Conducting research at times and places in crisis

*Stacey Menzel Baker and Courtney Nations Azzari*

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In times of crisis, people reach for meaning. Meaning is strength. Our survival may depend on our seeking and finding it.

– Attributed to Viktor E. Frankl

### INTRODUCTION

Natural and manmade disasters. War. Pandemics. Death. Religious, economic and racial strife. These and other types of crises lead human beings on an exploration of sense-making (Baker and Baker, 2016; Weinberger and Wallendorf, 2012). Why did the event(s) happen? Who or what is responsible for easing the suffering? How should we move forward? Crises are seen as turning points in our existence and, as our opening quote articulates, finding meaning in the circumstances gives us strength. Researchers – and, in particular, qualitative researchers – aid impacted publics in making sense of their circumstances, and as such, must carefully consider their role throughout the research process. This chapter explores unique issues involved when conducting research at times and places in crisis.

The methods used in research in such contexts are not unique, but the circumstance of their usage is. The trauma of a crisis (1) is sudden and non-normative, (2) exceeds current capabilities to meet demands, and (3) disrupts collective perceptions, needs and understandings (McCann and Pearlman, 1990). As such, the crisis context engenders a nuanced approach to understanding the focal issues involved. In this chapter, we offer suggestions, utilizing an acronym for structure, for researchers investigating crises. Our chapter is organized as follows:

- Context: immersing oneself in the research space
- Research transferability: contributing to science
- Intentional design: preparing for data collection
- Situating oneself: achieving clarity during data collection
- Interpretation: making sense of rich data
- Summation: presenting the research

### CONTEXT: IMMERSING ONESELF IN THE RESEARCH SPACE

Merriam-Webster's online dictionary defines a crisis as 'an unstable or crucial time or state of affairs in which a decisive change is impending; especially one with the distinct possibility of a highly undesirable outcome' (Merriam-Webster, 2023). Because crises are extreme events, they often expose issues that are not otherwise salient. Crises occur across time and space. Some crises, such as natural disasters, are brought about by immediate events, while

others, such as war and pandemics, occur over a series of events. Still others, such as religious, economic and racial strife, slowly boil until a tipping point is reached where society views current circumstances as untenable, and something must be done. Some crises, such as natural disasters and war, are localized, while others, such as pandemics, cross national boundaries. It follows then that researchers should be trained and develop skills in understanding the context of study (Stallings, 2002). This training is as important as developing skills in data collection methods.

When scholars demonstrate knowledge of their contexts, it gives them authority to ask and address their research questions. For example, Shultz et al. (2005) immersed themselves in the Balkans, and thus were able to explain how peace and prosperity can be achieved in part through food marketing during times of war. Their expertise on marketing activities throughout the food channel, as well as their expertise on geopolitical and sociocultural issues in the Balkans, enhanced the credibility and relevance of their insights. Similarly, Barrios et al. (2016) immersed themselves in transitioning war economies to illuminate how markets can be the site of social conflict and resolution. They showed how marketers' activities in the Colombian coffee industry helped with peacemaking through empowerment, communication, community building and regulation.

Many scholars, including those mentioned above, have a deep interest in providing practical solutions to crises. A managerial approach to crises often focuses on the context in terms of the phases of crisis: mitigation, preparedness, response and recovery. For example, Guion et al. (2007) analyzed communications for small businesses impacted by Hurricane Katrina, to offer insights on how social marketing could be used in developing risk communication plans across the four phases. As their research shows, the context of each phase differs, calling for different approaches to the application of data collection methods and practical solutions.

While the managerial approach is practically useful in terms of thinking about timing of crises issues, it may not allow for 'deeper understanding of causal factors that explain relationships between previously unrelated events, structures, perceptions, and actions' (Alexander, 2004, 1). The events, narratives, social structure and practices of crises provide rich data upon which to understand collective suffering and resilience (Baker and Baker, 2016). Exploring these relationships and causal factors enhances the transferability of the data collection, a topic we further explore in the next section.

## RESEARCH TRANSFERABILITY: CONTRIBUTING TO SCIENCE

Some form of transferability is valuable in most forms of research. In most peer-reviewed marketing publications, the description of an interesting context will not be enough to warrant publication. Depending on a journal's focus, the research will also need to extend an existing theory, develop a transferable framework, advance data collection methods, and/or provide significant implications for policy and practice. In other words, it must be clear that researchers have carefully considered how the context of study can be leveraged to contribute to science.

One example of research that extends theory was carried out by Baker and Baker (2016). The authors immersed themselves in a community nearly destroyed by an EF5 tornado. Their interviews, observations, analysis of a Planet Green documentary series on community recovery, and careful reading of written stories about recovery allowed them to extend cultural trauma theory (Alexander, 2004; Alexander and Breese, 2011). The original theory focused

on the trauma event, trauma practices, trauma narratives and social structure to explain how people make sense of crises (Alexander and Breese, 2011). Baker and Baker (2016) extended the theory to include resiliency events, narratives and practices, thereby explaining how people make sense of both vulnerability and resiliency via consumption to move forward in the face of disaster. In a similar fashion, Kapoor et al. (2022) used discourse analysis of YouTube posts and online news articles to highlight aspects of ritual revision during unsettled times (in this case, the COVID-19 pandemic). Their work extends ritual theory by explaining who controls ritual revisions, how ritual modifications are made and the potential benefits of revision.

There are many excellent examples in the marketing literature of transferable frameworks emanating from exploration of crises contexts. Mende et al. (2023) explored how consumers responded to COVID-19. Their framework uses an integrative lens of meaning making and life course theories to explain how different segments of people respond to threats. Wood (2022) introduces a Protection Knowledge Model to synthesize research on COVID-19 responses, particularly with respect to masks and stockpiling. A key aspect of how consumers behave is related to how they process the threat. Baker and Hill (2013) develop a framework for understanding a community psychology of object meanings. By examining how people interact with possessions as material objects transition from private to public (damaged possessions) and public to private (donated possessions), the Baker and Hill (2013) framework helps us understand how and why individual and collective tensions exist in community recovery in the face of disasters. Finally, Viswanathan et al. (2021) develop a theoretical framework to explain types of extreme marketplace deprivation in material, social and psychological consumption domains.

Though data collection methods in crisis do not differ substantially from methods in settled times (Stallings, 2002), how different methods are combined may become part of the central contribution of a research publication. For example, by combining mystery shopping with Zaltman's Metaphor Elicitation Technique (ZMET) interviews, Bone et al. (2014) provided evidence that white consumers are treated better than black consumers in financial service contexts – it was the combination of the techniques that enhanced the validity of their findings of systemic restricted choice and self-concept denigration that black consumers face in the marketplace. Similarly, a central contribution of Deberry-Spence and Trujillo-Torres' (2022) paper on how technology was used to commemorate ante-, peri- and postmortem memories was how the authors combined social and news media materials from nine countries. This study revealed the role technology played in making sense of death during the COVID-19 lockdowns, and their methods allowed them to make cross-cultural generalizations.

Contributions may also result from significant insights on how crises should be managed. Anderson et al. (2022) use a futures perspective of probable, possible and preferable futures after COVID-19 to highlight how retailers can serve customers during and after a crisis. Shultz et al. (2005) show how activities throughout the food channel can lead to peace and prosperity in war-ravaged countries. And Ozanne and Ozanne (2021) teach us that social capital built via a time bank before a crisis occurs can be leveraged during disaster recovery. Each of these publications build upon theory, but they also make significant contributions to managing crises. These contributions are possible because the researchers developed a deep understanding of the contexts of their studies, they had a desire to contribute to science and they had intentionally prepared for data collection efforts, the latter of which is explored in the next section.

## **INTENTIONAL DESIGN: PREPARING FOR DATA COLLECTION**

Before embarking upon a data collection journey, the researcher must consider the unit of analysis. This might include the micro level (individuals, families or relationships), the meso level (communities, organizations, ethnic groups or political parties), or the macro level (societies, countries, legal systems or economies). Selecting the unit of analysis informs not only the people who will be sought as participants but also research questions, recruiting outlets, relevant theories and instruments of data collection. For crisis research, scholars must ask themselves who has relevant information, how the impact of this information affects others, the extent of the vulnerability created by the crisis, the potential risk of seeking out participants impacted by a crisis and the ethics involved therein.

In some cases, it may be possible to access professionals who are close enough to the phenomenon to understand and offer insights, yet distanced enough to not experience direct trauma themselves. For example, emergency responders, government officials, medical professionals, funeral directors and social service providers may see and interact with consumers experiencing crisis day in and day out, and yet they may not be directly impacted (though some certainly experience negative emotions or burnout). Further, these professionals actually may be able to offer a broader array of insights than a concentrated group of consumers, given the variety and sheer number of encounters with clients experiencing crisis. This approach may suffice when those experiencing crisis are too traumatized or high-risk to participate in research. However, it is essential to remember that providers can only share their perceptions of the interactions and cannot speak directly to the lived experience of clients, consumers and/or customers. Thus, it is important to determine which route is best, acknowledging the pros and cons of each.

While qualitative inquiry often requires skill sets such as empathy, listening, and care, research involving crisis demands a higher level of commitment to understanding participants, mitigating vulnerability and practicing ethical decision making in collecting, using and reporting data. Facing a crisis often places those impacted in a vulnerable position (Baker et al., 2007); the last thing researchers want to do is exacerbate or exploit that vulnerability at the expense of participants. Given that a crisis tends to involve vulnerability and trauma, there are often existing resources for navigating this space available to researchers who wish to be diligent and prepared in their approach. For example, the US Federal Emergency Management Agency (FEMA) offers a slew of training courses and tools for volunteers and community partners. In contexts of death or loss, online courses in grief may prepare researchers to thoughtfully interact with participants while simultaneously minimizing risks for psychological harm or re-traumatizing participants. Taking advantage of such existing resources, which are widely available online, not only protects participants and facilitates a less onerous Institutional Review Board (IRB) process, but also helps the researcher manage their own experiences and emotions.

A useful element of crisis research is that a crisis is frequently covered by mainstream media. Thus, researchers need not rely solely upon potentially vulnerable victims for information. Coverage of crisis situations and related support materials that follow can assist the researcher in becoming as knowledgeable and well-prepared as possible before entering the field. Countless benefits may ensue from this preparation. First, it contextualizes the circumstance for researchers so they are not entering the space blindly. Second, it reduces the burden on individual or group participants, as they can freely share their experiences rather

than having to use their time to bring the researcher up to speed or educate them on the crisis. Third, it creates ease during data collection, as researchers can more readily understand and relate to content as interviewees share their experiences and perspectives. Fourth, crucial to understanding crisis may be understanding how the media framed or presented the event, as portrayals can wield real consequences for crisis victims (Baker and Baker, 2016). Related to framing, the researcher must take care to guard against sensationalized media portrayals and potential misinformation that may exist. Preparation for data collection makes the data collection process smoother, as discussed in the next section.

## SITUATING ONESELF: ACHIEVING CLARITY DURING DATA COLLECTION

Collecting data amidst trauma is a delicate balancing act. As scholars, we want our research endeavors, particularly those with the potential to make substantive impacts, to be as relevant and timely as possible. This can mean getting on the ground as soon as possible. However, it is also crucial to consider the state of participants and how the crisis has impacted their lives and emotional states. Thus, it may be better to wait to approach participants once an appropriate amount of time has passed. When interviewing those grieving a lost loved one, Gentry et al. (1995) waited until at least three months had passed between the death and the interview, in order to avoid the heaviest part of the grieving process. Another consideration may be the safety (of participants and researchers), particularly if a crisis has created a structural or chemical hazard. As mentioned above, accessing professionals close to the crisis, rather than victims themselves, may offer a valid substitute in some circumstances.

In academia, the pressure to publish is high, and competition for interesting contexts may exist. However, relying upon strong ethics and a moral compass is of utmost importance when examining crises. Scholars must honor their humanity and treat the wellbeing of participants as the most crucial component of the work. Research in the space of crisis should work to avoid exacerbating trauma. Once researchers have determined it is acceptable to approach participants, they should consider what sort of resources should be made available to participants, should the research process inadvertently cause harm. Finding online mental health support resources and incorporating them into the consent letter is a useful practice, so participants can easily access them if needed.

In addition to simply being the right thing to do, offering caring for participants also makes Institutional Review Board processes easier to navigate. By proactively minimizing risk to participants facing crisis, researchers can anticipate and mitigate concerns regarding risk. For example, in investigating the shared vulnerability of members of a community impacted by a tornado, Baker et al. (2007) included a former minister as part of the data collection team. They also had pamphlets available on where to seek counseling services, should the need have arisen.

One strategy for reducing the risk of exacerbated trauma is permitting the participant to lead the conversation. Developing an interview guideline and informing participants of the research agenda are useful for facilitating the majority of research conversations. However, a crisis presents unique issues that must be acknowledged. In this type of work, participants may find themselves discussing (perhaps even processing) their traumas aloud for the first time ever. This may lead them to speak about tangential issues seemingly unrelated to the research

project. At this juncture, researchers have a few options. If the content is somewhat related, it may ultimately be useful to allow participants to carry on, meandering through a discussion. If the content is completely unrelated, it may be best to genuinely acknowledge the story and gently pull participants back to the topic at hand. If the content is moving toward a traumatizing place, researchers may make the call to terminate the interview and re-offer resources.

When discussing crisis experiences, participants may find themselves in a space of catharsis and begin treating the interview as an outlet for unprocessed trauma. At one time or another, many qualitative researchers find themselves feeling as if they have moved into a therapeutic role. While this release and processing opportunity can be beneficial to participants, it is essential that researchers understand their limits during data collection and not attempt to offer advice or attempt to treat trauma. This is when referrals to professional assistance and health resources may become useful. As always, the researcher-as-instrument of data collection should act with empathy, humanness and care; however, doing so is not a substitute for professional care when needed.

As noted, it is important to prepare to manage big emotions – the participants' and the researchers' (Behar, 1996). Not everyone is cut out for this kind of data collection, and that is perfectly acceptable. Both observers and those observed are vulnerable, and the line between observed and observer is often blurry. Thus, practicing self-care throughout the research process is essential. The researcher may choose to practice meditation, engage in reflection with the self and/or with colleagues, and even take breaks from emotionally burdensome projects when necessary. Researchers should try to do no harm, by keeping the energy of data collection moving and healthy (Lipsky and Burk, 2009). They should appreciate both the strengths and the weaknesses of participants and interact in an intentional way. If the research is motivated by the goal to decrease suffering, the researcher team must make a commitment to wellness (Lipsky and Burk, 2009), which could mean volunteering their time to alleviate the suffering they study, considering and mitigating unintended consequences of research, or giving voice to the vulnerable. As this can also be helpful and cathartic for the researcher, actions aimed at increasing participant wellbeing are often symbiotic in nature.

Crisis contexts often lend themselves to abjection, or the state of being cast off and separated from social norms due to perceived contamination or moral violation (Nations et al., 2017). Trauma simultaneously drives humans to be repulsed and gawk – seeking to avoid the source while also finding themselves incapable of looking away (e.g. rubbernecking). As educated observers, researchers must acknowledge the abject and 'keep in check' that innate desire to ogle. Data collection should focus on the intent of the research and not move into the space of satisfying morbid curiosity, a naturally occurring psychological trait (Scrivner, 2021). Many, if not most, scholars are simply and insatiably curious about the world around them (a trait that leads them into this profession). However, when working with participants who have experienced crises, researchers should curb irrelevant curiosities and avoid topics that may only serve to exacerbate trauma, and not actually contribute to the research agenda at hand. As an example, when conducting research in May/June 2020 with funeral directors during the COVID-19 pandemic, the second author had to resist the urge to ask side-bar, curiosity-only types of probing questions when participants divulged astonishing lived experiences that seemed more like the movies than real life (Azzari, 2023). It is during these exchanges that scholars must govern intrinsic curiosity with professionalism.

Finally, researchers may experience pressures to take sides with different groups or individuals. This is particularly true in times of community crises, as community is not monolithic.

To deeply understand the crisis, researchers must excavate perceptions from different sides, and they must stay as neutral as possible. They should not exacerbate the social conflict that naturally occurs during crisis recovery processes (Baker and Hill, 2013). Developing an understanding of the crisis from multiple vantage points will also impact how researchers make sense of their data; a topic explored further in the next section.

## INTERPRETATION: MAKING SENSE OF RICH DATA

Data interpretation can be a daunting task. In addition to data stemming from a variety of sources (social media, interviews, news reports and so forth), there are a myriad of emotions associated with the data, which, as discussed previously, can be difficult to process. Interpretation often boils down to how a researcher makes sense of what caused the crisis and offering or leveraging a theory of social change that explains how people process crises and other life-altering events. There are at least four different approaches to interpreting crises (Alexander, 2004). First, are practical approaches that focus on the event(s) that cause the crisis (Alexander, 2004). If we can keep the event(s) from happening, we can prevent future crises. This approach is often used by emergency management professionals who focus on controlling the impact of some event (e.g. flood mitigation or tornado prediction).

The second approach is that a crisis is a response to an abrupt change (Alexander, 2004). Researchers believe that, to fix the problem, we have to alter the circumstances and our response to them. These approaches often use the crisis-phases approach (mitigation, prevention, response and recovery) and center around a particular event or set of events that are viewed as the cause of problems. Each phase can be managed with different responses; see Guion et al. (2007), discussed above.

The third approach is a psychological perspective, where a crisis stems from an originating event that is repressed, and to work through the crisis an individual must set things right within the self (Alexander, 2004). A need to return to normal motivates movement through liminality. Liminality is the idea that a crisis or major event in life sets in motion a decoupling from life as we know it, and a movement into an unknown, uncomfortable betwixt-and-between space, where we do not yet know what life will be after the proverbial dust settles (Turner, 1969; Van Gennep, 1908). The three stages of this process include separation from life as we know it, liminality and reintegration into a new normal. Crises are riddled with liminality, given that they often beget trauma and loss. Crises may involve death, loss of possessions, home destruction, displacement, illness, reduced mental or physical capabilities, and beyond. When a crisis occurs, humans are often pushed into a space of being unsettled – not knowing how to proceed or what life will look like. The event could be relatively self-contained, such as losing a home due to a natural disaster, living in FEMA housing for a year, and rebuilding a new home or relocating (Baker et al., 2007), though living through a crisis is rarely neat or easy. However, liminality can extend for years or decades, should trauma be ongoing or reoccurring. For example, parents or caregivers of children with disabilities may find themselves in a constant cycle of seeking resources for their children, attempting to improve their situations, but never quite finding a true solution or peace (Fisk et al., 2022).

The fourth approach is a cultural perspective that focuses on the event, narratives, social structure and social action, whereby a crisis is recognized as caused by the interactions between these factors (Alexander, 2004). This approach sees a crisis as something constructed

by social discourse and institutions; it helps identify the source of suffering and assigns responsibility for it (Alexander, 2019). At times, one source of suffering may be a displaced marketing system, and responsibility for fixing problems gets assigned to the institutions that comprise the marketing system (Baker et al., 2015; Ozanne and Ozanne, 2016; 2021; Shultz et al., 2005). The source of suffering is identified in the way people talk about and process different social problems. For example, Gratz et al. (2022) use text analysis to examine public statements of firms engaged in lawsuits over their role in the opioid crisis. Their research finds that firms use words that reflect denial and, because people are more likely to remember concrete details, firms often speak in the abstract.

These four approaches lead to different interpretations and solutions. Each takes a different approach to crises; thus, each will lead to a different interpretation of the data and context. As the examples in this section show, the way a crisis is interpreted determines the way people assign meanings and responsibility. Researchers should consider the following questions (among others):

- Is the solution that individuals and communities should return to normal?
- Is the solution that the crisis be viewed as an opportunity for change?
- Who is being affected?
- How does the crisis impact individuals?
- How does the crisis impact collectives and different institutional types?
- How do consumption and the market play a role?

Reflexivity, an ongoing process of reflecting upon the research process, considering ongoing interpretations and considering ‘ethically important moments’, is essential not only to engage in rigorous research, but also to foster an ethical research process (Guillemin and Gillam, 2004). These questions and processes must be considered before the research is presented, the final topic to which we now turn.

## SUMMATION: PRESENTING THE RESEARCH

People experiencing a crisis have a need to express themselves following an event (Veer et al., 2016). After a secondhand exposure to experiences and interpretations of crises, researchers may experience a plethora of emotions as they work to process their data and make sense of their findings. When researchers engage with the emotions and experiences of people and places, it lets them put themselves in their work and they can draw deeper connections. With this level of engagement, audience members may also see connections to themselves (Behar, 1996). While journal articles continue to be the coin of the realm in business schools, there are many ways to contribute to understanding crises, including books, presentations at academic conferences and professional associations, white papers, podcasts, blogs, and sharing results with research participants. For example, Baker et al. (2007) conducted town hall meetings to share their research findings with community members recovering from a natural hazard event. It should be noted that, in this situation, it was especially important for the researchers to maintain neutrality because the community was conflicted about how donated resources were distributed. The researchers did not want to contribute further to the conflict between different groups in the community, so had been careful to interview people in all stakeholder groups, including business, government, nonprofit and citizens.

One important issue to consider before sharing the research is whether to reveal the location of a study. There are no hard and fast rules on this issue. In reporting on disaster research, it is common to share the location (e.g. Baker et al., 2007). It is also common to share the location in subsistence contexts (e.g. Viswanathan et al., 2021). Revealing the location may be important, as doing so can help explain the events and the sociocultural context of the study. Still, whether to share the location should depend upon how the researchers characterize the community in the presentation. Another important issue is preserving the anonymity of participants. Given that publication or presentation is often the academic goal, confidentiality should not be expected (unless a participant explicitly states they wish to say something ‘off the record’); however, anonymizing the data is crucial to protecting participant identity. Role and organization labels should be sufficiently abstract so as to disguise the identity of different narratives.

A legitimate goal for social science is to illuminate social responsibility and prescribe collective action (Alexander, 2019). To present a balanced understanding of the circumstances investigated, both resource deficits and assets of individuals, social groups or institutions should be emphasized. As noted previously, in a crisis situation there is a strong likelihood for negative outcomes. Thus, researchers should carefully consider their role in each phase of the research process.

## CONCLUSION

Our goal in this chapter is to provide practical insights for conducting research in times and spaces related to crises that become topics of qualitative inquiry. We offer a useful acronym – CRISIS – to help scholars commit these tools and ideas to memory. We suggest researchers commit themselves to the research topic by becoming fully immersed in the context, including the spaces, peoples and topics impacted by the crisis (C). While qualitative research with crises often dives deeply into a unique context or fringe experience, it is important that the key lessons and takeaways, particularly related to wellbeing outcomes, be transferrable to other contexts, future crisis events and relevant theory development (R). Researchers should be intentional in the ways that they design projects that examine crises, taking particular care in preparing themselves to practice empathy, caution and reflexivity (I). It is also essential that the researcher truly understands the situation and circumstance surrounding the crisis, including who is impacted, what different factions emerge, when and what types of inquiry are appropriate and how to keep ethics at the forefront of the research process (S). Making sense of crisis data is a burdensome task, which cannot be taken lightly. Thus, we advise researchers to work back and forth with extant literature and ground themselves in a particular perspective, taking care to understand the underpinnings and impacts of adopting this viewpoint (I). Finally, researchers must discern when and what to reveal related to the research process and resulting findings. Risks and benefits must be weighed, including potential impacts on communities and collectives of study, as well as the potential for resulting research to improve the wellbeing and outcomes of future groups experiencing crises, particularly through strategic dissemination to relevant stakeholders (S).

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## 7. Reflections on template creep and replicability concerns in contemporary qualitative research

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It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, it was the season of light, it was the season of darkness, it was the spring of hope, it was the winter of despair.  
— Charles Dickens, *A Tale of Two Cities*

### INTRODUCTION

In some respects, it can be argued that qualitative researchers who study consumers and marketing phenomena are enjoying a best of times/worst of times moment. Why the best of times? Because, arguably, work in qualitative research traditions is enjoying ever-greater acceptance and respect. An increasing range of the premier journals in our field have signalled their willingness to consider submissions that rely on qualitative research methods (see e.g. Fischer and Taltekin Guzel, 2023). Further, a steady stream of qualitative papers continues to appear in outlets such as the *Journal of Consumer Research*, which began to welcome such work several decades ago. Moreover, and relatedly, there is general acknowledgement that qualitative papers in our field are disproportionately likely to be impactful, as reflected by the number of citations these papers attract (e.g. Dahl et al., 2015; Rapp and Hill, 2015). And the successful institutionalization of the Consumer Culture Theory Consortium, together with long-running gatherings such as the Interpretive Consumer Research workshop, provide critical opportunities for those who seek to develop and share qualitative research.

Why the worst of times? Although the term ‘worst’ is definitely something of an exaggeration, we see significant trends that, taken together, betoken an era when qualitative researchers are likely to experience increasing pressures to perform their craft in ways that threaten to restrict it, or to reduce the variety and creativity critical to its potential for contribution. Some of these trends have been fueled by spillovers of the reactions to what has been deemed a ‘replication crisis’ in experimental social psychology (e.g. Pham and Oh, 2021; Pratt et al., 2020). Other trends arise from a seeming tendency among some who review qualitative research to advocate for an excessive uniformity in how qualitative research is conducted (Dolbec et al., 2021). This may even include the exertion of pressure to adhere to certain methodological templates (Pratt et al., 2022). What these trends have in common appears to be a quest to ensure that the qualitative research we conduct and publish is rigorous, trustworthy and transparent. While these goals in themselves are doubtlessly laudable, we argue that the trends we cite can have unintended consequences without actually achieving the commendable aims.

In the remainder of this chapter, we elaborate on the trends we worry may be driving us toward something of a season of darkness for qualitative research. We then offer what we believe are reasonable practice guidelines for addressing concerns regarding rigor, trustworthiness and transparency without imposing onerous and unproductive constraints on qualitative researchers.

## TRENDS OF CONCERN #1: TEMPLATE CREEP

Methodological templates have been defined as ‘standard ways of conducting research that are used as formulas for shaping the methods themselves, especially data collection and analysis’ (Pratt et al., 2022, 212). Qualitative researchers in the field of management have identified numerous templates (Gehman et al., 2018), including the case study method as delineated by Eisenhardt (1989), the grounded theory method (Gioia et al., 2013) and process-theorizing methods as delineated by Langley (1999). In our own field, enabled theorizing (defined as ‘the use of pre-existing theoretical perspectives, theories, or conceptual lenses to inform various moments in the conduct of qualitative research’ (Dolbec et al., 2021, 444)) can arguably be said to have become something of a template. As another example, Humphreys’ (2010) approach to collecting and analyzing large bodies of archival media data using a mix of automated and inductive interpretation has emerged as a template. A third example of a template is the phenomenological approach popularized by Thompson et al. (1989).

Templates undoubtedly gain popularity for some understandable reasons. First, they may demystify qualitative research. Particularly for novices, the adoption of a template may help to simplify and systematize a methodology that seems overwhelmingly difficult to master (Harley and Cornelissen, 2022). Templates may thus make qualitative research methods feel more accessible. Second, signalling the use of templates may help to win over reviewers who are themselves unsure about how to judge the quality of qualitative research (Corley et al., 2021). Third, and most importantly, templates may be perfectly appropriate for some research projects: they may serve as inspiration and help the researcher collect and analyze data in a manner that addresses their research questions well.

Despite these benefits, however, the unbridled appropriation of templates is a cause for concern, as many – including creators of templates – acknowledge (e.g. Dolbec et al., 2021; Eisenhardt et al., 2016; Gioia et al., 2013; Langley and Abdallah, 2011; Pratt, 2009; Reay et al., 2019). One concern is that users often fail to recognize that no template can fully accommodate the particularities of specific research projects or fully anticipate the subtle ways projects differ. As Pratt et al. (2022, 213) argue, ‘the analogy of the map and the terrain is useful here. A template is at most a map; the project is the terrain and infinitely more complex than the map.’

Another concern regarding templates is that, unless they are adapted creatively, they can stifle novelty, both in the approach to analyzing data and in the theories that are produced (Corley et al., 2021). For example, Belk and Sobh (2019, 490) caution that enabled theorizing is too often guilty of ‘taking a few basic theories and refining and extending them’ and that ‘theory-enabled research is more often theory-constrained research’ (2019, 493). And Fischer and Parmentier (this volume) argue that the approach to analyzing archival data that Humphreys (2010) introduced to our field, while invaluable, is best seen as but one of many possible approaches to the collection and analysis of such data. Likewise, the phenomenological interview – while well suited to projects grounded in a phenomenological paradigm – is less appropriate for research anchored in other ontologies and epistemologies.

To be clear, we are not arguing that templates are valueless, or in themselves dangerous. Rather, we argue that standardized applications of templates may mean that rigor gives way to

‘rigor mortis’ (Eisenhardt et al., 2016, 1113). While templates used judiciously may be generative, templates used without sufficient adaptation can result in dull and uninspiring scholarship (Harley and Cornelissen, 2022; Reay et al., 2019).

## TRENDS OF CONCERN #2: REACHING FOR REPLICABILITY

Scholars who conduct quantitative or experimental research are only too aware of what has been called the ‘replication crisis’. The term refers to the fact that the results of many scientific studies have proven difficult or impossible to reproduce, and that in fields such as consumer research ‘many … findings are difficult to replicate and might, in fact, not be true’ (Meyvis and Van Osselaer, 2018, 1157).

For those who conduct research of this kind, a replication experiment to demonstrate that the same findings can be obtained in any other place by any other researcher is conceived as an operationalization of objectivity. It is the proof that the experiment reflects knowledge that can be separated from the specific circumstances (time, place or persons) under which it was gained (Schmidt, 2009).

One response to the replication crisis has been the adoption of open science practices (Open Science Collaboration, 2015), such as encouraging or requiring researchers to make their data and research materials accessible to other scholars, so they may more easily attempt replications. This initiative is premised on the notion that, to be trustworthy, research must be replicable, and that to ensure replicability, researchers need to make available for scrutiny their data and data collection instruments.

While this trend may be logical and appropriate for experimental research, its applicability to qualitative research is highly debatable, despite the fact there have been recent, explicit calls to ensure the replicability of qualitative research (e.g. Aguinis and Solarino, 2019; Bamberger, 2019). Such calls reflect ignorance regarding the ontology and epistemology of qualitative research. The ontology underlying experimental research assumes reliable truths exist, and its epistemology implies that knowledge creation can be confirmed through replication. In contrast, most qualitative research rests on a more open-systems view that suggests ‘the ground is always moving underneath the knowledge claims made in any earlier moment … From this point of view, replication would or should evoke skepticism rather than confidence’ (Pratt et al., 2020, 5). To be clear, qualitative researchers do not and should not eschew the ideal of transparency regarding research methods. However, for these scholars, the point of transparency is not to facilitate replication; rather, it is to help other researchers identify contexts that are roughly the same as those in which earlier theories and concepts seem relevant.

There are additional concerns related to calls for making qualitative researchers conform to norms considered (by some) appropriate for quantitative researchers, such as those related to specific open science ideals (e.g. preregistering studies, posting data collection protocols and publicly sharing data). Preregistration, which entails posting a study’s research design, hypotheses and plans for analysis in the public domain prior to collecting data, makes no sense for qualitative research studies for which the design is deliberately emergent and based on ongoing data analysis (Pham and Oh, 2021). Further, it would be antithetical to the nature of

qualitative research to harbour *a priori* hypotheses, since this choice would put researchers at risk of failing to learn from their data.

While sharing data collection protocols is not impossible per se, the reality of qualitative research is that protocols are repeatedly updated and modified, often on the fly, as researchers encounter new insights from analyzing data they have already obtained (Meyer et al., 2005). Even when protocols such as interview guides are relatively stable, there is no guarantee that two people using the same protocol would obtain the same data, since the human interactions involved in collecting qualitative data are highly variable. Indeed:

... standardization in how qualitative questions are asked and in what order would make for poorer quality interviews because they could not be tailored to the responses and insights of each interviewee  
... In this sense, the pursuit of replication, far from enhancing the quality of research, is liable to constrain it (Pratt et al., 2020, 7).

Finally, sharing qualitative data with those who are not part of the research team involved in conducting research is often inappropriate. Specifically, ethics review processes often require that data collected from informants not be shared except with those involved in data collection and analysis. And even if institutional ethics review boards approve sharing data more widely, advising informants that their data will not be held in confidence seems likely to decrease the likelihood of participation, or to increase the pressure for informants to limit what they convey to researchers. It might be argued that interview data can be scrubbed to ensure informants cannot be identified. However, this begs the question of whether the resulting data will be stripped of vital contextual information, and what purpose would be served by sharing this data. This latter concern is particularly salient given that the researcher is the central instrument in qualitative research, where the data analysis is influenced greatly by a their ‘background, experience, training, skills ... cross-cultural sensitivity, and how [the researcher], as a person, engages in ... analysis’ (Patton, 2015, 40). Therefore, the assumption that sharing qualitative data will ensure greater transparency is naïve at best, and dangerous at worse. One could imagine a scenario where a researcher re-analyzes a dataset and is unable to replicate the insights of an author because of the different tools and resources each brings to the analysis.

We have laid down two trends of concern that harbor the potential to jeopardize the positive reception that qualitative research in marketing is currently experiencing. In the remainder of this chapter, we offer reasonable avenues to address these two trends.

## MOVING FORWARD: ADDRESSING TEMPLATE CREEP

Lively discussions and special issues have recently been published in management that discuss avenues to address template creep (e.g. Gioia et al., 2022; Harley and Cornelissen, 2022; Köhler et al., 2022; Pratt et al., 2022). We first propose a few guidelines that relate to both the concerns and benefits of using templates, and echo those laid out in the management literature. Second, because we see template creep as an institutional issue, we expand beyond guidelines directed at researchers, to advocate for field-level change.

Templates can improve qualitative research accessibility and legitimacy and, when appropriate for a specific question and project, the research process more generally. Yet, they can also be stifling and overly structuring. Since templates contain positive features, it seems

unproductive to categorically condemn and discourage their use. Rather, we suggest avenues to use them productively.

Centrally, we see templates as tools; their usefulness stems from their role as methodological guidelines (Ravasi in Gioia et al., 2022; Jarzabkowski et al., 2021). Yet, as with the use of any tools, the user needs to be skilled and competent; otherwise, there is likely to be very little value created from their use (Vargo and Lusch, 2014). We suggest four guidelines to help ensure templates are used skillfully: 1) developing template knowledge; 2) understanding philosophical implications of methods; 3) developing qualitative research skills; and 4) translating methodological decisions into writing.

First, skillfully using templates entails developing an understanding about them regarding why, how, and when to use them. This includes knowledge related to qualitative approaches such as grounded theory, ethnography, netnography, discourse analysis, coding, interviewing and the like. We are not suggesting that a researcher be comfortable with all that qualitative methods have to offer, but that they at least be ‘comfortable in the tradition(s) of [their] choice’ (Prasad, 2005, 285). Understanding the foundational elements of a research tradition should provide a qualitative researcher with the toolbox necessary to become creative in the use of templates. Over time, building one’s expertise in multiple research traditions will provide the resources needed to move towards practicing methodological bricolage, and devising tailored and creative solutions to address research problems differently, potentially leading to both methodological and theoretical innovations (Gioia et al., 2022; Pratt et al., 2022).

Second, a template is a specific type of tool that carries with it sets of values and beliefs about the world and how knowledge should be generated. The philosophical underpinnings of templates wield implications for data collection and analysis. For example, Gioia and Mees-Buss engage in a debate regarding the naturalistic roots of the Gioia method and whether we should treat interview data as objective or subjective (Gioia and Mess-Buss, in Gioia et al., 2022). The implications here are an imperative for expertise in qualitative research that expands beyond the application of research methods. Ideally, qualitative researchers should be able to situate different templates within their associated paradigm. Put more succinctly, practicing qualitative research demands that researchers be attuned to the philosophical implications of their methodological decisions (Pratt et al., 2022).

Third, our conceptualization of templates as tools positions researchers as craftspeople. As is true for other crafts, mastering the qualitative research process requires practice. Involving oneself in the research process, reading extensively about methods, documenting the research process, reflecting on the journey and embracing doubts and hunches are all requirements for developing the skills and knowledge necessary to practice qualitative research appropriately and effectively (Locke et al., 2008; Sætre and Van de Ven, 2021).

Last, to improve both accessibility and legitimacy, qualitative researchers must translate their research processes into methods sections that relay the analytical steps through which they devise the findings. This means expanding much beyond the lip service typically paid to some key articles and methodological moves that have almost become tropes (e.g. iterative cycling, or the back-and-forth between data and theory). We suggest researchers write transparent and illuminative methods sections that clearly explain their analytical decisions and clarify how the process ensured coherence across methodological and philosophical underpinnings, logical consistency between theory and data, and the consideration of alternative explanations. Clarity and transparency in methods sections should ensure methodological

rigor and trustworthiness and might also help educate readers, contributing to moving away from the blind use of templates (Harley and Cornelissen, 2022; Pratt et al., 2022).

Our discussion of guidelines for individual researchers brings us to field-level implications. Template creep is arguably an institutional issue (Corley et al., 2021; Gioia et al., 2022; Pratt et al., 2022). For this reason, addressing it also requires the involvement of researchers in their roles as reviewers, gatekeepers and mentors. Our assumption is that, when researchers reach such positions, they have demonstrated the expertise required to be effective bricoleurs with an apt understanding of the philosophy of science.

When scholars serve as reviewers, we advocate for openness to philosophical and methodological pluralism. When receiving our own reviews, we are quick to criticize reviewers from other research paradigms who lack the proper methodological and philosophical understandings of qualitative work; yet, we are also sometimes guilty of the same general misdeed of wanting to impose some view of the world on a qualitative research project that may not share our proclivities. Not all research projects need to be informed by key and dominant concepts or fashionable theories, whether these focus on the role of ideology on consumption or the use of practice or assemblage theory. Approaching reviewing work by bracketing our own theoretical or methodological predilections, and meeting authors on their chosen ontological and epistemological grounds, should help limit the imposition of templates on authors' works, a phenomenon decried in both management and marketing (Dolbec et al., 2021; Gioia et al., 2022).

In their role as gatekeepers, we advocate that those in editorial positions, whether as associate editors or editors, defend qualitative researchers and support plurality by managing reviewers who might implicitly or explicitly demand certain philosophical or methodological positions, especially in cases where they explicitly request the use of templates. Managing reviewers may simply mean underscoring in decision letters that certain requests made by reviewers can be regarded as optional. In some cases, it may even be necessary to request that reviewers tone down their reviews before circulating them to authors. This requires that gatekeepers possess a thorough understanding of qualitative methodologies and can identify the potential philosophical and methodological biases reviewers might have left unchecked to convincingly convey why a certain approach, or worse, a template (!) might not be warranted.

Last, in their role as mentors, experienced qualitative researchers are responsible for providing educational opportunities (Gioia et al., 2022). Despite the progress fueled by people who now hold mentorship positions, qualitative research is still somewhat marginalized within academic marketing research. It is not systematically taught in doctoral programs in business schools, nor fully understood by most researchers in the field. We all share the responsibility for educating students as well as colleagues on the topic. Fortunately, students who lack advisors skilled in qualitative methods within their home institutions can avail themselves of the workshops and seminars regularly organized by associations such as the Consumer Culture Theory Consortium and the European Doctoral School of Consumer Culture Theorizing. Posting about these initiatives can be found online.

## MOVING FORWARD: ADDRESSING REPLICABILITY IMPERATIVES

The underlying concern with the replication crisis is whether experimental research findings are true; it is assumed that greater transparency on data and data collection should improve trustworthiness (Meyvis and Van Osselaer, 2018). Yet, we see it as imperative to ‘decouple transparency from replication in establishing trustworthy qualitative research’ because we disagree that the same premise holds for our methodological approaches (Pratt et al., 2020, 1). Although we first offer caveats about offering general guidelines, we provide some additional recommendations for authors that should help them convey to review teams and readers that a research project was conducted rigorously and that findings are trustworthy. Our guidelines sidestep the need for adhering to data transparency principles since, as we discussed, these are unlikely to heighten the trustworthiness of qualitative research and could, in some cases, detract from the research process and the outcomes of research projects.

Blanket guidelines to build and assess trustworthiness in qualitative research are difficult to create because of the aforementioned variety of ontological and epistemological bases from which qualitative researchers might conduct their project (Pratt et al., 2020). For example, guidelines for research from a naturalism paradigm differ from those in ethnographic or positivist traditions (e.g. respectively, Lincoln and Guba, 1985; Locke and Golden-Biddle, 1997; Yin, 2003). For example, while Yin’s guidelines, which are anchored in positivism, emphasize the need for construct, internal and external validity, those of Lincoln and Guba (1985), which are anchored in naturalism, focus on credibility, transferability, dependability and confirmability.

Given that we argue for methodological and philosophical pluralism and push against template creep, we do not recommend overarching guidelines for qualitative research. Rather, we stress the importance of aligning the evaluation of trustworthiness with the research tradition from which a project is undertaken. The responsibility of ensuring and evaluating trustworthiness thus rests on experienced researchers and reviewers who can understand a certain paradigm and the characteristics from which the quality of the research should be evaluated.

Nevertheless, we believe some recommendations are still in order. First, we amplify our prior suggestion to authors regarding transparency, clarity and honesty when explaining the research process, such as data collection and analytical decisions. In the sections of their papers that cover research context and methods, authors should clearly convey why a context was ideal for a project, what variables or constructs were central to the study and how the data was collected and analyzed. Clearly indicating the research tradition would also help signal to reviewers the kind of criteria to use when evaluating the trustworthiness of the research results. While it may be impossible to provide data transparency, it is crucial to provide methodological transparency.

Second, echoing our recommendations to address template creep, reviewers and gatekeepers also bear responsibilities to ensure trustworthy qualitative research (Corley et al., 2021; Pratt et al., 2020; Pratt et al., 2022). It may be that reviewers or associate editors are tasked to review research from traditions far from their own, or in which they might not be fully competent. At the very least, indicating such a lack of knowledge and expertise would help editors ensure an appropriate review process. It is also important that reviewers do not impose the criteria for evaluating trustworthiness associated with their own preferred research tradition if its philosophical assumptions clash with those of the research being evaluated.

Last, given that the evaluation of the research process rests on the important role of the review team, journals should strive to ensure the representation of qualitative researchers on their editorial review board. We understand that it might be impossible to include associate editors or reviewers representing all qualitative research traditions. Yet having experts on hand who can readily identify members from the discipline who could serve such a role seems crucial in ensuring qualitative research's continued legitimacy.

## CONCLUSION

Template creep and the push for data transparency in qualitative research are interrelated issues. When researchers lack the training to fully understand the methodology they use and the why of their analytical decisions, when reviewers and editors do not protect qualitative research from a paradigmatic push towards the embrace of positivistic guidelines, and when journals are ill-equipped to review qualitative research because they lack qualitative researchers on their editorial review boards, we see the use of templates as more likely. As standardized solutions, templates may enhance the allure of trustworthy research. Yet template creep is also likely to undermine the creativity and innovation that make qualitative research such a potent means of generating highly novel theories and highly cited papers (Corley et al., 2021; Cornelissen, 2017; Pratt et al., 2022).

We are well aware of the politics and tensions in legitimacy at the heart of these linked issues. On the one hand, arguing that the uniqueness of qualitative research should insulate it from the type of scrutiny that experimental research is currently experiencing runs the risk of further marginalizing the approach as a weird science. This is especially true in a context when the 'age of qualitative inductive research' might have finally arrived in marketing, a good decade after our colleagues in management (Corley et al., 2021, 161).

To be clear, we are not making such an argument. We stress the need to conduct and convey our research processes rigorously and transparently. Yet, the current guidelines embraced by some flagship journals are worrisome. Should we comply with pressures to mimic what might look like trustworthy research from different research traditions, we may lose the unique ingredients that make qualitative research such a powerful approach. If there is one thing that more than a decade of researching cultural industries has taught us, it is that bending a genre to appeal to mainstream tastes is likely to create work that becomes ultimately tasteless.

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## PART II

# PARADIGMATIC PERSPECTIVES

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## 8. Thoughts on theory: post-qualitative research and the possibility of new theorising

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The Universe is so much bigger than you realize.  
– Alpha Waymond, *Everything Everywhere All at Once* (2023)

### AN INVITATION TO NEW WAYS OF THINKING

When I was invited to contribute to this volume with a chapter reflecting my thoughts on theory, I was both flattered and bewildered. What might these thoughts entail and how I should go about enticing others to (re)think about theory in methodological terms? Serendipitously, I had come across the concept of post-qualitative methodology in Gherardi's (2019) work and was immediately intrigued by its promise to spark new ways of thinking (about research).

Trained originally as an art historian, my understanding of 'post' centred on the chronological coming after of art movements, like the post-Impressionists that came in the wake of Impressionism. Yet there is more to a 'coming after' than being next in line. The postmodernist aesthetic movement in architecture and its new conceptualisations of space, for instance, ignited the avant-garde in critical theory and the rise of poststructuralist thinkers (cf. Foucault, 1970; Deleuze and Guattari, 1987; Derrida, 1970; Barthes, 1977) whose deconstructive criticism of 'beliefs' concerning truth, knowledge, power, the self and language in turn has influenced our own theorising in marketing and consumer research (cf. Ahlberg et al., 2022; Thompson et al., 1998). If 'post' can be understood as both the chronological coming after and a breakaway from existing knowledge systems, what then comes after qualitative research? And how might we go about deconstructing the paradigms that underpin our very thinking?

In the simplest of terms, post-qualitative research invites researchers to think about research differently. As Bettie St Pierre (1997) suggests, this new wave of inquiry will move us 'to produce different knowledge and produce knowledge differently' (175). Working in the shadow of the poststructuralists, post-qualitative inquiry invites us to critique and deconstruct disciplining and normalising 'conventional humanist qualitative methodology', which stifles theorising (St Pierre, 2021, 163). As the irrefutable mother of post-qualitative inquiry, St Pierre (1997) fears qualitative methodology is 'reductionist, hegemonic, and sometimes oppressive [to the extent that it] has lost its radical possibilities' to produce novel theory (175). She laments the somewhat positivistic approach of qualitative methodology where strictures such as problem statement, research questions, research design, systematicity and representation get forced onto humanist concepts (2014). Kuby (2023) warns how traditional research training 'prevents us from recognising the "new" that is always already there in the world' (939), and Lather (2013) invites use to break free from the shackles of our current paradigms.

In working the ruins of methodological norms (St Pierre and Pillow, 2002), post-qualitative research enables us to 'rethink and think-anew our research practices' (Kuby, 2023, 939), so its ultimate goal is 'to re-orient thought to experiment and create new forms of thought and

life' (St Pierre, 2021, 163). The 'post' in post-qualitative research is not only a chronological coming after, but centres on a process of deconstruction. By questioning existing frameworks and units of analysis, asking ourselves what counts as data, subjects, the field, an interview, author/ity, agency, the body, reflexivity and so on (Gherardi, 2019), we broaden both our theoretical and methodological horizons (St Pierre, 2011).

Albeit thought-provoking, questioning core research concepts can cause a state of methodological paralysis. In fact, post-qualitative inquiry involves much unlearning, and can be quite unsettling as to how we do research moving forward (Murris, 2021). Essentially, it shifts the relationality between ontology, epistemology and ethics, inviting us to reimagine our research and carve out our own path within these philosophical offerings, balancing as it does on the edge of theory and practice. Post-qualitative research then acts as a playground for experimentation to think of paradigms as not set in stone (Kuby, 2021). Somewhat poetically, it emancipates us as researchers from the confines of prescriptive methods that shape our ways of thinking.

This is far from simple; in fact, I see some uncanny parallels between the body of work on post-qualitative research and the mind-blowing experience of watching the multi-Oscar-winning film *Everything Everywhere All at Once* (2022). Both the papers I read and the film gave me a sense of unease like nothing else: they shook my core, quickened my heart, numbed my brain. Both made me question everything I knew (or thought I knew) about life, the universe, research. Paradoxically unpleasant and delectable, this feeling of discomfort helps spark our minds and awaken our senses from a slumber of blindly following the norm – and we need more of it. Just as the film's character Alpha Waymond invites us to discover a universe of possibilities (see the opening quote to this chapter), post-qualitative research invokes the '(im)possibilities of doing qualitative inquiry' (Kuby, 2023, 944), making these invocations alluring and terrifying all at once. In the movie, a naïve Evelyn Wang discovers infinite versions of herself as she leaps across the multiverse of possible life paths she could have taken. Similarly, post-qualitative research invites us to uncover the possibilities of what *else* we could accomplish in our research, beyond what normative methodologies tell us.

Hardcore proponents (e.g. St Pierre) argue post-methodologies do not offer a 'corrective' (2011, 613) but rather a 'methodology-to-come' (Lather, 2013, 635). In this chapter, I do not provide a tutorial on how to conduct post-qualitative research, but instead – like Alpha Waymond in the janitor's closet – hope to entice curious researchers to consider how the 'post' in qualitative inquiry can open us up to a multiverse of onto-epistemological and methodological possibilities, enabling our research to live up to its full potential.

To paraphrase Barthes (1977), does the birth of post-qualitative research come at the cost of the death of conventional qualitative inquiry? In coining 'post-qualitative research', has St Pierre in fact killed qualitative methodologies as we know them? Is qualitative research really so flawed that we now must move on to new forms of inquiry, abandoning who we are and how we think as researchers? Denzin and Lincoln (2011) provide a succinct overview of the merits of traditional qualitative research, many of which are rooted in the humanist approach of this research paradigm, both in terms of capturing human experience and the researcher's empathetic stance toward their topics and participants. Post-qualitative researchers, especially purists like St Pierre, take issue with 'conventional humanist qualitative methodology' (2011, 611) in two ways: first with the prescriptive tools that dictate how we do qualitative inquiry and what constitutes researchable data, and second with the very possibility of the researcher as subject.

## WHAT LIES IN THE ‘POST’ OF POST-QUALITATIVE RESEARCH?

In championing post-qualitative research, St Pierre (2011) warns us of clinging onto existing research methods and established paradigms as if they were true and real, losing sight that we made them up in the first place (613). She bemoans how as researchers we are taught more methodology than philosophy, where methodology becomes the trap that ‘reassuringly tells [us] what “to do”’ (St Pierre, 2021, 164). St Pierre (2021) argues how methodologies can be self-referential and imprisoning, confining us to structured, legitimised processes of data collection and analysis that risk clouding other ways of thinking and writing about research. Organisational theorists echo these concerns as they question the zealous use of qualitative templates (e.g. the Gioia method of Gioia et al., 2013) as necessary frameworks of analysis (Köhler et al., 2022). These critiquing authors highlight how in their *structure*, templates risk becoming too *restrictive*, a criticism that acts as a catalyst to ‘pave new pathways that embrace the diversity and plurality of qualitative approaches’ (183).

Paving new paths, however, comes with its challenges, and St Pierre recalls how her discovery of post-qualitative inquiry was more destabilising than inspiring. After diligently collecting her interview data for her doctorate, she found how this material simply fell apart once she tried to align her method to the post-structural theories she was ‘writing-thinking-with’ (Kuby, 2023, 938). Seduced by Deleuze and Guattari’s ‘radical ontology’ (1987) that strips the human from ontological privilege (Le Grange, 2018), St Pierre (2018) realised traditional qualitative research fails to fully explore the possibilities of a world that is ‘becoming’, ‘arrested’ as it is by methods and methodologies that are too categorical and limiting (604). In their science of *differance*, Deleuze and Guattari (1987) argue that ‘it is not is; it is becoming’ where science embraces a logic of ‘and’ whereby science is not this or that but ‘this and this and this and this’. With this logic, they invite us to take risks in our thinking (St Pierre, 2011, 613). Methodology for St Pierre (2014) – as opposed to epistemology or ontology – had become mechanised, instrumental, reductionist and too representational, whereby the very language we use to talk about methods (e.g. the interview, the field, even data) pins us down. Instead, she calls for riskier approaches that better encompass the messy, fragmented, creative and surprising elements of our complex worldings.

In breaking the norms of academic writing we see how post-qualitative researchers become better equipped to think differently through their writing as they ‘creatively confuse, disrupt, and transform more “conventional,” mechanical, and human-centred forms of academic writing’ (Huopalainen, 2022, 959). In so doing, they can consequently contest human superiority, scholarly *authority*, and taken-for-granted patriarchal, disembodied, binary discourses inherent in our writing practices. Some have adopted intrepid ways of writing – from dirty writing (Pullen and Rhodes, 2008), embodied writing (Boncori and Smith, 2019), feminine writing (Pullen, 2018; Vachhani, 2019) and even feminist dog writing (McHugh, 2012). These novel approaches ‘confus[e] the boundaries between self and other’ (Huopalainen, 2022, 968), that is between human, material (Barad, 2003), environmental (Banjaree and Blaise, 2013), nonhuman (Latour, 2005) and more-than-human (Braidotti, 2002) others.

As well as writing differently, post-qualitative researchers question how we go about collecting and coding data in this era of coming after (Benozzo and Gherardi, 2020). Regarding

data collection, St Pierre (2018) questions the privileging we give qualitative interviews as seemingly flawless tools that ‘capture the true essence of the participant’ through ‘the pure breath of her body that comes forth in her voice’, as this phonocentrism prioritises both ‘speech and the metaphysics of presence’ (606). Closer to home, we see in marketing how researchers have ventured beyond the spoken words of their participants by collecting rich, sensorial data through sight (Rokka et al., 2018), sound (Patterson and Larsen, 2019) and smell (Canniford et al., 2018). And what about unofficial data that do not get recorded in the field? St Pierre (2018) reflects on equally important data that ‘appear in dreams, in [the] body, and in memories’ (606) and how these more shadowy forms of data might make their way into our findings (Benozzo and Gherardi, 2020). In widening our data collection horizons, St Pierre (2011) proposes the inclusion of transgressive data: ‘emotional data, dream data, sensual data, memory data, and response data [...] that were not visible and that disrupted linearity, consciousness, and the mind/body dichotomy’ (621). These new forms expand our methodological palette, allowing for novel ways of thinking about research. Rethinking what counts as data, leads us to ask what might also count as interviews, the interviewer or interviewee, particularly in the dawn of artificial intelligence (Sidaoui et al., 2020).

When thinking about data collection, St Pierre and Jackson (2014) suggest ‘using theory to determine first what counts as data and second what counts as “good” or appropriate data. In that way we do more with less’, instead of adopting a ‘vacuum cleaner’ approach that ‘sweep[s] up any and all data into our studies’ (715). Moreover, they advocate for including literary or secondary data in coding and analysis, much like the literary criticism we have witnessed in marketing and consumer research (see Brown et al., 2022), and stop privileging only ‘brute’ primary data (715). In an effort to avoid coding-fatigue, St Pierre and Jackson (2014) invite the researcher to read, read and read some more before deciding what might be worthy of collection, so that by ‘thinking with theory’, post-qualitative researchers accept that coding analysis occurs ‘in the middle of things’ (Deleuze and Guattari, 1987, 293). Not dissimilar to the mind-boggling sensation of watching *Everything Everywhere All at Once*, where our infinite life paths flash before our eyes, we see that a key characteristic of post-qualitative research is that aims, methodologies and analysis all emerge as they go. As such, the approach acknowledges and embraces the challenges of trying to study and report in a world that is always already entangled (Lather and St Pierre, 2013).

Barthes (1977) reminds us that the very existence of an author constrains our reading: the death of the authoritative author induces the birth of the reader, one freed from the author’s intent and open to individual interpretation. In letting go of prescriptive methodologies, we become free to theorise in new ways, opening up our inquiry to new unimaginable, or incomensurable, worlds of interpretation (St Pierre, 2011, 2013).

## **POST-QUALITATIVE INQUIRY VS. GROUNDED THEORY: METHODOLOGICAL OR THEORETICAL CARTE BLANCHE?**

St Pierre states the first commitment of post-qualitative research is ‘to refuse any pre-existing research methodology’, followed by a second: ‘to embrace the onto-epistemology and concepts of the philosophical tradition’ (St Pierre, 2021, 164). By breaking the habit of rushing

too quickly into normative, humanist methodologies (Kuby, 2023), post-qualitative researchers can follow ‘provocations that come from everywhere’ (St Pierre, 2018, 603) and more importantly ‘re-orient’ their thinking through philosophical reading (St Pierre, 2021, 164). Through reading, we allow this new philosophical language to ‘wash over [us] until it becomes familiar’ (2011, 614). St Pierre (2014) assures that ‘if [we’ve] studied the theory carefully [our] “methodology” will follow’ (10), luring us away from the comforts of conventional methodologies that provide handy, pre-existing processes and recognizable categories or templates that help engineer our data collection and analysis. Some scholars go as far as urging us to think ‘without’ method (Jackson, 2017) to free ourselves from ‘epistemological imperatives of knowledge production’ (667); others call for ‘broader, looser, more generous’ ways of thinking about method (Law, 2004, 4) that better equip us to deal with the messiness of social science research. Writing without method will, naturally, be thwarted by our publishing praxis, where journals demand methodological transparency and rigour.

If we are unable to fully embrace a utopian *method-less* approach from start to finish, as post-qualitativists we can dive into research ‘in the middle’, where we think and write with an openness to remain ‘receptive to chance encounters’ that may ‘take us somewhere [...] and do something [new]’ (Jackson, 2017, 673). In living with theory(ies), post-qualitative researchers come to realise how reading philosophy becomes ‘deeply imbricated’ with method (St Pierre, 2011, 621). That is, reading philosophy not only inspires but shapes how we think about data, analysis, subjects – and the nature of being, being human, language and representation, and knowledge (St Pierre, 2011, 2021).

In contrast, grounded theory champions a theory-less approach and encourages full immersion in the field where researchers are ‘open to what is discovered empirically’ (Walsh et al., 2015, 586); resulting in an emergent theorising (Fischer in Figueiredo et al., 2017). This openness affords ‘new, unexplored areas of research to emerge’ (Rodner, 2019, 158). Inductive by nature and data-driven (Fischer and Otnes, 2006), grounded theory avoids ‘forcing pet ideas onto data’ (Rodner, 2019, 156) and, with its theoretical openness, fosters the ‘discovery’ of novel theory (Glaser and Strauss, 1967) that emerges from research contexts (Goulding, 2005). Grounded theorists collect, code and analyse data iteratively, making choices about how to home in on their data and theorising as they go. This approach necessitates a certain boldness where researchers

should just get on with [their] research, and when [they] do it [they] will see that the most amazing theories will emerge. If bogged down in philosophical discussions, [researchers] will be less productive, less sensitive to what goes on in a social setting, and no theory will emerge. (Gibson and Hartman, 2014, 17)

We see then that post-qualitative research and grounded theory make uncomfortable bedfellows. Having advocated for (and benefited from) the wonders of grounded theory myself (Rodner, 2015, 2019) this leaves me in a methodological (if not existential) crisis: how do I reconcile opposing approaches to theory generation that uniquely afford novelty, creativity, insight and researcher bravery? Despite their differences, both approaches are emergent by nature, so the qualitative researcher may still find harmony within this discord. Could our envelopment in philosophical reading be coupled with a methodological openness in the field? Could our engagement with broader theory open instead of confine our minds as to what constitutes data in our fieldwork? Is there room for a post-qualitative grounding of theory? As a playground for experimentation to rethink paradigms (Kuby, 2021), post-qualitative research

remains open to possibilities of theory generation that may potentially be paired with elements of grounded theory.

In marketing and consumer research, we see a preference for using aiding or enabling theories (Figueiredo et al., 2017) as a way to understand (and neatly present) phenomena. Crafting empirical research this way helps produce highly theorised, easy-to-follow stories that take the reader on a theoretically convincing and empirically rich journey, ‘marr[ying] data with analytical tools and ontological perspectives in ways that advance ongoing conversations’ in the field (Dolbec et al., 2021, 443). For many of our most desirable journals, leveraging enabling theory has become common practice, if not the benchmark (Figueiredo et al., 2017), to the point that some critique enabling theories as too disciplining, narrowing our possibilities to generate truly creative, original theoretical insight. In pursuing original consumer culture theory, Belk and Sobh (2018) prescribe blending grounded theory and abductive reasoning as a means to break away from the more deductive-experimental approach that begins with an enabling theory and ‘demonstrate[s] its relevance to a particular empirical context’ (491). Instead, they call for using ‘alternative theoretical explanations’ for a single phenomenon, which should widen our interpretive horizons and sharpen our theoretical skills (489).

In contrast to the enabling theory approach, where a theory shapes from start to finish how to interpret a social phenomenon, post-qualitative research proposes a ‘theoretical and philosophical playground’ where theories and philosophies invite us to imagine the ‘how and why’ of our be(com)ing: our context, our research practices, our knowledge, ourselves as researchers (Kuby, 2023, 940). To sink our teeth into the applicability of post-qualitative research, below I draw inspiration from others to see how they think and write with a difference.

## BE(COM)ING A POST-QUALITATIVE RESEARCHER: INVITATIONS TO THINKING AND WRITING DIFFERENTLY

Less ‘diehard’ post-qualitative researchers who might not fully embrace the death of empirical research as we know it (*à la St Pierre*), may be left wondering how to put post-qualitative research into practice. Rather than killing method, we may decide to ‘destroy habituated forms of method’ (Jackson, 2017, 673), remaining more open to methodology better suited to the entanglements and complexities of our field. So, rather than resorting to mainstream (read: vanilla) methods, post-qualitative methodologies help open our eyes to new perspectives, interpretations and subjectivities (Huopalainen, 2022). I offer a few examples that showcase methodological innovations from post-qualitative enthusiasts who think and write differently. Drawing from various disciplines, this review represents an *amuse-bouche* and I invite readers to both review this body of work and experiment with post-qualitative research in themselves.

In adopting post-qualitative methods, and specifically the post-humanist practice of feminist dog-writing, Huopalainen (2022) actively wrote with her bitches (i.e. two female dogs, Saga and Selma). She decentres the human as sole and seemingly superior actant, making space for nonhuman perspectives, where writing becomes a process of ‘co-being’ and research a process of ‘co-becoming’ (Huopalainen, 2022, 973). Feminist dog-writing is provocative and queering, and invites us to question our onto-epistemological assumptions and (human) privileges (Haraway, 2003). In extending agency to more-than-human assemblages, this freer approach unearths new ‘ways of writing, knowing and creating (scientific) knowledge’ (Huopalainen, 2022, 973), where the nonhuman is neither overlooked nor silenced. Huopalainen (2022)

considers the affective, agentic, and spatial elements of the ‘humanimal’ entangled worldview, so that her writing captures affectual ‘intra-actions’ and ‘co-constitutions’ rather than ‘exclusively human subjectivity or agency in the world’ (965). Consider this excerpt:

Crafting affective proximity,  
feeling, *sensing*, and responding to you.  
Mimetic resonance.  
The complexity of intersubjectivity between species.  
[...]  
Dogsleashcollarshumansharedpathsoutdoorsrubberainbootswetgrassthescentofraincoat  
Becoming one with treeswaveswaterchillywindraindrops.  
*Belongingness.*  
*Data that doesn't fit into expected or neat categories.*  
[...]  
Nurturing posthumanist relations of care  
[...]  
Moving with you  
to breathe, to feel,  
to be us. (969–70)

Huopalainen (2022) embraces the disruptive *raison d'être* of post-qualitative research, critiquing and disrupting conventional modes of inquiry by asking herself ‘who is the subject?’ and ‘whose bodies or writings are currently heard?’ This approach helps her to ‘mov[e] away from the *hu-man author-ity*’ allowing the human and nonhuman author(s) to ‘meet – on more equal terms’ (960).

We see a similar blurring of bodily boundaries in Game’s (2001) intra-species encounter with her cat, where his ‘rhythmic’ licking grooms both his fur and her hair in an indiscriminatory co-production of humanimal grooming:

Close to my face on the pillow, does he think that he is human or that I am a cat? But this is to ask a humancentered question that this experience defies, a question that presumes the separation of entities, cat and human, as well as the primacy of thought. For in that unintegrated state between sleep and wakefulness, when I forget borders, forget where one begins and the other ends, I am experiencing cat and human as part of each other, as indeed they must be for this grooming to be possible. (1)

In a similar but less convivial interspecies account that goes beyond pets, Valtonen et al. (2020) explore multispecies assemblages between humans and mosquitos in the context of Finnish summer holidaymaking. In acknowledging the role of seemingly insignificant insects, Valtonen et al. (2020) capture the ‘complexity of ethical relations’ of these ‘fellow travellers,’ where human-insect intra-actions revolve around issues of violence and care (1). Unlike pets-as-extended-family members, mosquitoes are seen as a nuisance for human travellers who do their best avoid, or even kill, their nonhuman others with little ethical consideration. Drawing from feminist new materialism (Barad, 2003), which challenges a prevailing anthropocentric, masculinist and dichotomist onto-epistemology of mastery and control over the world, Valtonen et al. (2020) posit a post-anthropocentric approach that ‘decentres the human as the master of the earth and recognises instead the agency of multiple others, the way all earthly creatures entangle and live together’ (3). In considering how to *re-present* the transcorporeality of these mosquito-tourist encounters, Valtonen et al. (2020) adopt a memory-work narrative (Onyx and Small, 2001), where multi-voiced storytelling helps trace

the ‘fleshy’ affective moments where nonhuman (mosquitoes) and human bodies (authors and family members) ‘related and intersected’ (4). Unconstrained by conventional forms of human-centric qualitative research, Valtonen et al.’s (2020) approach helps bring the mosquito into a shared limelight with their human-others, thus foregrounding the porosity of our bodily boundaries. In living (i.e. collecting data) and writing (i.e. analysing data) with mosquitoes, the authors bring new theorising to the field of trans-corporeality, ‘making tangible the messiness of ethics of [the] worlding’ of multispecies encounters (8). These narratives illustrate how scholars problematize issues of subjectivity, asking themselves: Who or what is considered a writer? What counts as writing? Which narratives, perspectives, agencies and bodies become privileged (or excluded) from our academic accounts of the field?

In the above accounts, we see an effort to privilege the nonhuman (namely, animal) to break with the anthroparchy, that is a ‘social system of attitudes, practices and institutions through which the natural world is dominated to the benefit of humans’ (Huopalainen, 2022, 974 in Cudworth, 2005), and the general hu-man-centredness of our academic writing. Others seek to capture the entangled stories of human and more-than-human others, including physical and environmental elements, forces of nature and cosmovisions. Lather’s (2013) collaborative work with indigenous and nonindigenous researchers in Australia, for instance, brings various epistemologies to the fore. The ethnographic team, with their various epistemological underpinnings, capture cultural differences regarding the pedagogy of place, everyday practices, the relationship to the environment (in particular, the lack of water in the region), elusive knowledge, and race (641). Similarly, Le Grange (2018) records the ‘agential capacities’ of more-than-human elements, namely water and land in the context of South Africa, by weaving post-qualitative research with Indigenous ethico-onto-epistemologies or cosmovisions, such as Ubuntu (5).

We see how post-qualitative research paves the way for decentring humans from academic writing, welcoming novel ways of thinking and writing. To close, I consider post-qualitative research’s ontology of immanence and invitation to embrace our be(com)ing as researchers.

## TOWARD AN ONTOLOGY OF IMMANENCE: LEANING INTO THE ‘NOT YET’ OF POST-QUALITATIVE RESEARCH

We have seen how post-qualitative research is both risky and provocative, calling as it does for a disruption of the academy and taken-for-granted conventional humanist methodology that threatens to thwart our possibility of novel, meaningful research. In its provocations, it invites us to rethink our ‘relationship with the surrounding world’ (Huopalainen, 2022, 964) and, thanks to this onto-epistemological openness, encourages us to problematize how we approach research, how language and methods shape research, how we make judgements about what counts as data worthy of research, and how we should experiment with counter-practices of writing, including non-linguistic and nonrepresentational forms. Post-qualitative research reorients our thinking and therefore should look and feel different.

I see much promise in this new wave of research that comes in the wake of ‘post’ philosophies, as it opens our third eye to a multiverse of possibilities, never fixed but in a state of be(com)ing. Drawing from the poststructuralists, post-qualitative research proposes an ontology of immanence, where nothing is perceived as outside of, but rather immanent to research

(St Pierre, 2019). As such, it is ‘what is coming into being’ (St Pierre, 2019, 4), so we should espouse

a cacophony of ideas swirling as we think about our topics with all we can muster – with words from theorists, participants, conference audiences, friends and lovers, ghosts who haunt our studies, characters in fiction and film and dreams – and with our bodies and all the other bodies on the earth and all the things and objects in our lives – the entire assemblage that is a *life* thinking *and, and, and* [...] (St Pierre, 2011: 622, emphasis in original)

With its transcendental empiricism, post-qualitative research does not search for themes and patterns in empirical data, nor code data with constructs (such as gender), as this practice would ‘rely on the binary that assumes a two-world ontology’ (St Pierre, 2019, 6). Instead of binaries, post-qualitative research unearths continuums and multiplicities (Lather, 2013), where boundaries become blurred (Le Grange, 2018) and we think across, rather than between, bodies.

Marketing and consumer research has witnessed its own ontological awakening, where scholars embrace assemblage and actor-network theories as ways to look beyond the purely human of their social contexts (Bajde, 2013). However, Franco et al. (2022) note there is still work to be done in this field and propose an object-oriented ontology (or OOO) to more fully widen our scales and units of analysis beyond familiar binaries that continue to favour the human over the nonhuman. I hope my overtur of post-qualitative research in this chapter helps nourish such debates as we continue to query how we think and write differently about our research. My own reading of the tea leaves is that we should not throw in the towel of qualitative methodologies per se. Instead, we should stop and take stock of our research before and during fieldwork and avoid rushing into methodologies par excellence that may narrow our theoretical horizons.

Why consider post-qualitative approaches now? More so than ever before, our academic research and writing should embrace, care about and ‘reconsider the place of the human in relation to nature and other animals’ (Huopalainen, 2022, 973) as well as to other nonhuman others, especially in the light of climate change and other challenges. As we enter a new geological epoch (Braidotti, 1994) and a new digital era (Le Grange, 2018), we have an ethical duty to think and write differently about research, where we knock ourselves off the pedestal of our own human *authority* (Huopalainen, 2022). I believe post-qualitative research provides us with inspiration to embark on this new era of thinking and writing differently.

Like Alpha Waymond in the janitor’s closet, I invite readers to open their (googly) eyes to a multiverse, to look beyond binaries, and lean into the breath-taking possibilities of be(com) ing post-qualitative researchers.

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## 9. Rethinking the critical imagination: thinking, doing and connecting

*Jeff B. Murray and Rafaela Canova Davide*

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### INTRODUCTION

It has now been over three decades since the publication of ‘The Critical Imagination: Emancipatory Interests in Consumer Research’ in the *Journal of Consumer Research* by Murray and Ozanne (1991). In 2006, this article was updated in the *Handbook of Qualitative Research Methods in Marketing* (Murray and Ozanne, 2006). Now, 17 years later, it is again time to rethink the critical imagination. So much has changed in the last two decades. New processual critical theories, emphasizing facets of phenomena that have been historically overlooked such as emotion, have forged new paths for research. New associations have explored novel applications of critical theory to creative and relevant cultural contexts. The purpose of this chapter is to explore these innovations, providing a clear and simple approach to the most important methodological issues. Doctoral students and researchers seeking to pursue a critical perspective may find this chapter can serve as a blueprint for orienting their critical work.

Rethinking critical theory is part of its ontology. Indeed, critical theory has a long history of adapting to new historical contexts. First-generation critical theorists – the Frankfurt School – struggled to recover the more philosophical Marx, Freud and Nietzsche against the background of fascism and Nazism as these movements gained powerful footholds in Europe (Murray, 2022). The second generation, led by Jürgen Habermas and his students, struggled to understand the colonization of the lifeworld against the background of the linguistic turn and the 1970s student movements (Murray, 2022). Third-generation critical theorists such as David Held, Mark Poster, Douglas Kellner and Ben Agger wrestled with philosophical challenges posed by the postmodern condition (Murray, 2022). Today, new social problems such as surveillance capitalism and artificial intelligence are igniting a new generation of critical theorists, which is leading to new ideas and new applications.

This chapter is organized around three themes. The first, *thinking*, discusses the logic of critical theory and how it is different from traditional social theory. The key concepts of critical theory and their relationship demonstrate a decontextualized resiliency across the generations of critical theorists. In this sense, the essential nature of how critical theorists think has remained the same. The second, *doing*, presents a methodological blueprint for developing and managing critical theory projects. This newer theme, emerging in the last seventeen years, involves articulating a step-by-step processual method for empirical research. Finally, *connecting* acknowledges the importance of social networks and associations that can provide encouragement, resources, moral support and mentorship for critical researchers. These organizations are also new, emerging in the last two decades.

## THINKING

Critical theorists intentionally avoid simple definitions, struggling to keep their perspectives open-ended and mutable. In fact, since the inception of the Frankfurt School in the 1920s, the phrase *critical theory* has been discussed in a variety of contexts and used in many ways. The perspective is often clarified by explaining underlying guiding assumptions such as ontology, axiology and epistemology (Murray and Ozanne, 1991), or by comparing critical theory with traditional social theory (Horkheimer, 1972). More contemporary definitions describe critical theory as polycentric. For example, Haraway (1997, 95) suggests, ‘*critical* means evaluative, public, multi-actor, multi-agenda, oriented to equality and heterogeneous well-being’. Given this emphasis on broad heteroglossia, we identify six conceptual reference points that characterize critical theory, differentiating it from traditional social theory: normative, domination, history, reflection, dialectic and imagination. Together, these concepts explain the way critical theorists think.

### **Normative**

Critical theory unites the empirical analysis of what is with normative theorizing about what should be. Empirically and philosophically, critical theory analyzes how power relations constrain the realization of human potential (Murray and Ozanne, 1991). Human potential is understood in terms of human rights and Enlightenment values such as justice, equality and liberty. The *Universal Declaration of Human Rights*, drafted by representatives from all regions of the world in 1948, is foundational to critical theory. Article One states, ‘All human beings are born free and equal in dignity and rights. They are endowed with reason and conscience and should act towards one another in a spirit of brotherhood’ (United Nations, 1948). This foundation cuts across history and cultures, helps define human dignity, and exists beyond mere words and language. Experiences that contradict this foundation are open to critical analysis. Methods and processual theories used by critical theorists are structured to resolve these contradictions. At the same time, the values of human rights are culturally embedded, and an emphasis on heteroglossia encourages continual interpretation, debate and negotiation as to how these declarations are enacted.

### **Domination**

Critical theory assumes all social relations and arrangements entail some form of domination and exploitation. The critical-emancipatory interest seeks to challenge and change these relations of superordination and subordination. Although social change may introduce new forms of domination, an overall evolutionary gain with respect to liberation is assumed by critical theorists as part of their ontology. Future social arrangements will be less constraining and more empowering than past social arrangements. Thus, critical theory is committed to a belief in social progress.

Critical theory explores the cultural impact of three forms of domination. The first arises from power relations in a social hierarchy. These relations often result in power/passive relationships, which ultimately lead to exploitation. For example, surveillance capitalism has resulted in new forms of information technology that can gather behavioral data from above; this data can then be used to predict and manipulate behavior in the interests of capitalist goals

(Zuboff, 2019). Another example is the outsourcing of work to Asian factories and the extraction of workers' surplus value as a form of external exploitation.

The second form of domination occurs when people internalize the norms and values of their cultural context and, over time, make them their own (Agger, 1991). This form of domination removes power relations from social hierarchies. Here, rather than thinking of power as an instrument of coercion used by social actors, power is everywhere, diffused and embodied in discourse, knowledge and regimes of truth (Foucault, 1977). For example, when we implicitly accept the cultural circumstances of growing up in a meritocracy, we value hard work and production, reproducing the social arrangements that lead to social pathologies and exploitation. Indeed, we become agents of social control, critical of individuals who are not productive.

The third form of domination is the emotional control that arises from superstition, cynicism, fear and disinformation. Critical theorists seek to analyze widespread self-deceptions, or false consciousness, since this form of internal self-disciplining ultimately leads to social pathologies, allowing external exploitation to go unchecked. For example, contemporary expressions of fake news undermine democratic processes, leading to distrust of media and the discrediting of science. Given its historical roots in the Enlightenment, critical theorists believe current contemporary struggles can be alleviated through the application of communicative action and reason (Habermas, 1987).

## History

Critical theorists study society as a historical totality. Social facts are not inevitable constraints on human potential but are pieces of history that are malleable (Durkheim [1901] 1982). In other words, the society we live in is not natural; it is historical. Domination is most effective when people lose a sense of history and their potential to act in history. If people understand that society is a product of a specific set of interests, they are better able to critique these interests and act to change society. Giddens (1982, 14) said it most poetically, 'social systems are like buildings that are at every moment constantly being reconstructed by the very bricks that compose them'. We reinterpret this quote to suggest that social systems are at every moment being constructed and reconstructed, one sentence at a time.

Theoretical perspectives that do not contain a normative component may be understood as conserving, in that they reinforce the status quo and therefore encourage reproduction of the existing social system. By reflecting on what should be, alternative social arrangements are envisioned, encouraging the transformation of the existing social system. Initiatives such as Consumer Culture Theory (CCT; Arnould and Thompson, 2005), Transformative Consumer Research (TCR; Mick et al., 2012), and Gender, Markets and Consumers (GENMAC; Penalosa et al., 2023) all encourage critical theories, which seek social transformation and the alleviation of suffering.

Given the logic of critical theory, every perspective contributes to either reproducing or transforming society; no neutral Archimedean vantage point exists (Anderson, 1986). Critical theory's critique of positivism is that this perspective uses an elaborate language game designed to mask underlying interests and thereby claims to be value-free. To study society, all research adopts some social vision and thus embraces a substructure of assumptions, sentiments and values.

## Reflection

If domination makes the existing society appear natural and therefore inevitable, then critical reflection can restore a sense of history. Reflection is an important method used to challenge and contest domination. Critical theorists distinguish between two types of reflection. First, one can reflect on the meta-theoretical meanings embedded in a theory. This type of reflection helps scholars become aware of the underlying interests, sentiments and assumptions used in research. Specifically, which guiding values does the theorist implicitly assume when writing theory? What types of society are imagined by these values? And, who benefits by this social imaginary? Since values are often deeply embedded or masked, reflection requires the process of excavation, what Paul Anderson refers to as *critical relativism*. This is the process of excavating a theory's methodological, ontological, metaphysical and axiological commitments before granting epistemic authority to its knowledge claims (Anderson, 1986).

The second type of reflection involves thoughtful consideration and awareness of the cultural impact of social actions. Here, it is assumed that personal individual experience cannot be understood without also understanding the history of society. The sociological imagination entails making the connection between personal challenges and larger social issues (Mills, 1959). More specifically, one could reflect on relationships between individual consumption lifestyles and forms of social organization. Through reflection, the consumer may choose to defy or resist traditional notions of consumption, become more independent from the market-place or define their own needs from different perspectives (Ozanne and Murray, 1995).

These types of reflection do not happen automatically. The purpose of a critical pedagogy is to generate awareness and raise consciousness. Intellectuals are well equipped to launch theory-driven programs that focus attention on social problems, contradictions and injustices.

## Dialectic

Rejecting both determinism and voluntarism, critical theorists assume social arrangements are constructed through a dialogue between individuals and society. Open and free democratic debate helps reveal the tensions between individual interests and the social ideas that become embedded in social structures and policies. Creative ideas may begin at the margins of society, then diffuse to opinion leaders who encourage interpretation and public debate. This debate helps clarify the key issues, triggering emotions that may motivate a critical pedagogy. Ultimately, this process may culminate in a new social movement struggling for social change.

A good example of the dynamic interplay among individuals and social structure is Holt's (2002) dialectical theory of consumer culture and branding. He describes the way consumers continuously respond to and subvert the structural processes that attempt to influence and diffuse meaning. While marketers use brands to engineer and package historical identities, consumers use them to speak back, pursuing personal sovereignty and individual life projects.

A second example is Murray's (2002) juxtaposition of sign experimentation and sign domination in the context of semiotic codes useful for individual expression. Here, the struggle to control meaning, and therefore identity, involves a tug of war between social structures and individuals. What often starts out as a personal creative expression (e.g. wearing vintage

thrift-shop clothes) may become commercialized and uncoupled from the lifeworld of the individual, only to re-enter it later as an outside force. Given the colonizing tendencies of social systems, style becomes a dynamic project to maintain control of meanings that are important to the individual.

## **Imagination**

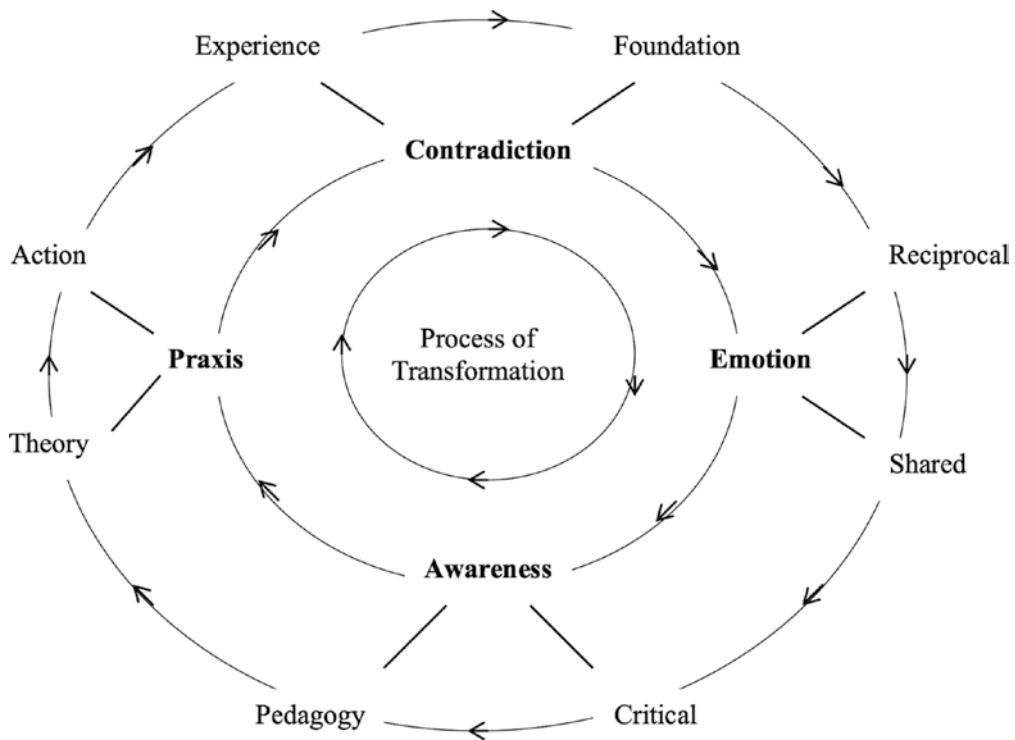
Critical theory consists of both a negative and a positive moment. The negative moment is the critique of actions that contradict fundamental values. The positive moment is the creative imagining of possible alternatives. It is the hopeful act of imagination that completes the critical paradigm, bringing the six points of reference together as part of an interlocking perspective. Thus, critical theory is a normative theory that prompts reflection on domination (and) restoring a sense of history and the dialectical imagination (Murray and Ozanne, 2006).

## **DOING**

Doing critical theory focuses on a critical method useful for engaging in empirical studies. Murray and colleagues (2019) propose a processual method that stresses the importance of critical reflection and the historical process of unmasking. This method enables the researcher to render what appears to be natural and inevitable into something historical, and therefore, changeable. Figure 9.1, adapted from Murray et al. (2019, 321) summarizes this method, which is fundamentally committed to the concept of process. Empirical attention focuses on the dynamic movement through which one set of social arrangements gives way to another. It is useful in two ways. First, it enables the researcher to provide a descriptive account of the status quo and how societies change over time. Second, consistent with the normative logic of critical theory, it is prescriptive, providing a useful blueprint for instigating strategies for social change. A variety of methodological techniques can be used empirically to describe and delineate each phase in the process (Burawoy, 1998). The dialectical process of transformation proposes four principles of social change that we discuss below: contradiction, emotion, awareness and praxis (Murray et al., 2019).

## **Contradiction**

Contradiction is the first principle of the dialectical method. The ongoing process of social construction inevitably results in contradictions between lived experience and foundational principles and values such as the *Universal Declaration of Human Rights* (1948) discussed above. People may become aware of these inconsistencies or incompatibilities, which then may foster potential ruptures in the fabric of social life. Contradictions create disruptions, which make radical breaks with the present order a possibility. Societal contradictions emerge from cultural production in two ways (Murray et al., 2019). First, contradictions emerge between new cultural forms and previously established social formations (Benson, 1977). Second, social production in one segment of society may contradict social production in another. Both types of contradictions are important since they produce crises, enhancing the possibility of social change.



Source: Adapted from Murray et al. (2019, 321).

*Figure 9.1 The dialectical process of transformation*

### Emotion

Emotion is the second principle of the dialectical method. The experience of crisis may trigger a range of emotions – an important component of the dialectical method, since emotions bring together the participants and activists needed to energize new social movements and serve as catalysts for thinking and action. Feelings of anger, despair, frustration and hope, arising from the experience of social contradictions, are key in triggering the critical imagination (Murray et al., 2019). What starts out as a feeling of discontent may eventually become understood critically as a wider social problem (Mills, 1959). Social movements generate two kinds of emotions (Goodwin et al., 2000; Jasper, 1998). *Reciprocal* emotions are affective ties, bonding people together around a common purpose and integrating the movement. This type of emotion is the glue, creating solidarity and holding the movement together. Emerging from the thrill of collective expression, resistance and protest, they foster a sense of purpose and longevity. *Shared* emotions are feelings held by the group at the same time, but they do not have other group members as their objects (Goodwin et al., 2000; Jasper, 1998). With shared emotions, the group nurtures a common anger over experiences and events arising from social contradictions. Both types reinforce each other, helping to build a movement's culture.

## Awareness

Awareness is the third principle of our dialectical method. While the second principle draws attention to how emotions fuel the dialectical process, awareness emphasizes the importance of thinking and reason. Progressive literacy is an approach to awareness concerned with transforming relations of power from the bottom-up (Kincheloe, 2008). This cognitive dimension is most strongly associated with the Brazilian educator and activist Paulo Freire (1973). His overarching objective is to humanize and empower students, emancipating them from being objects of education. Activists using a critical pedagogy believe learning must be fundamentally tied to a struggle for a better life through the construction of a society based on nonexploitative relations and social justice (McLaren, 2017; Murray et al., 2019).

## Praxis

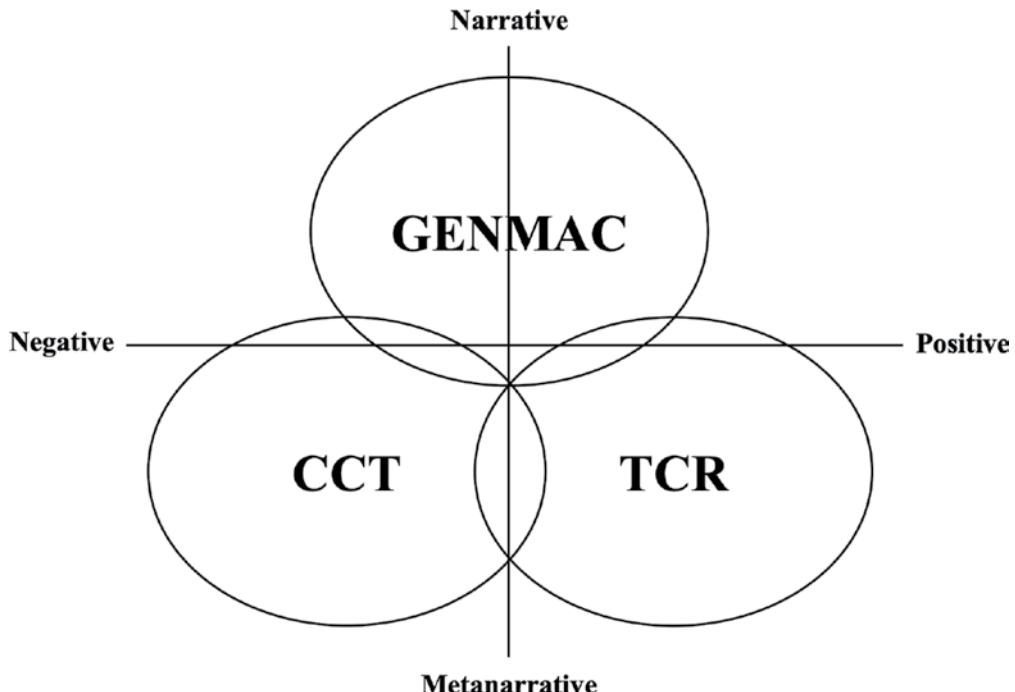
Praxis is the fourth principle of our dialectical method. This principle emphasizes doing – turning reason to action (Murray et al., 2019). From the perspective of critical theory, praxis connotes theory-driven action. In this sense, it emphasizes the relationship between how one thinks about social arrangements and how one contributes to the social reproduction or social change of these arrangements (Murray et al., 2019). Praxis underscores that theorizing is not enough; it needs to be combined with activism if social change is to occur. In this way, praxis intervenes directly with a specific aspect of society; it is activism working to change established social structure. If successful, this activism resolves contradictions and begins to remedy social problems. This principle does not mean the dialectical method functions as a closed loop, since new social arrangements inevitably reveal new contradictions. Thus, our dialectical method represents a continuous spiral advancing human potential and the critical imagination.

## CONNECTING

An important insight emerging since we wrote about this topic in the first edition of this *Handbook* seventeen years ago is that it is not enough to just understand the logic and method of the critical imagination. Rather, to engage in a sustained and productive critical research agenda, one needs a community of like-minded researchers. Such an academic community creates a sense of belonging and purpose that can be sustained across time and space. These communities bring scholars together to advocate for a specific orientation. They provide needed support as members work together to develop their perspective(s). This is particularly true if the orientation has been historically marginalized. In the same way reciprocal and shared emotions are important for new social movements, they are important for research communities, enhancing solidarity and resilience as members work to expand their influence. In the last seventeen years, several progressive communities have emerged to help critical scholars develop their ideas in different ways. Figure 9.2 clarifies the unique positions of three progressive communities associated with the marketing and consumer research fields.

Figure 9.2 is based on two dimensions. We discussed the first – positive versus negative – above in the section on imagination. Negative, in this context, refers to a critical orientation that is theoretically diagnostic. Here, the emphasis is on understanding phenomena that

contradict foundational principles and values. The negative moment in the critical imagination leverages various traditions in social theory to better understand the nature of critique and what exactly is problematic about the current set of social arrangements. For example, Habermas (1984) brings together Parsons's (1951) social system theory with Mead's (1934) symbolic interactionism to help us better understand how lifeworlds (Schutz and Luckmann, 1973) become colonized, leading to a variety of social pathologies. Note this diagnostic is deeply theoretical, bringing together several different traditions in sociology and philosophy. However, Habermas's (1984) social ontology does not present a remedy, or a clear path to help us resolve problems.



*Figure 9.2     Connecting to critical communities*

Positive, in this context, refers to a critical orientation that is restorative and remedying. Rather than becoming preoccupied by never-ending theoretical arguments, this moment in the critical imagination seeks solutions to specific social problems. Community organizers, social workers and nongovernmental organizations (NGOs) work to solve these problems and restore a sense of justice. Organizations such as the American Immigration Council, the National Immigration Law Center, The King Center, Greenpeace, and Earthjustice all become more effective when connected with productive academic communities. Here, the focus is on social impact rather than on enhancing theoretical understanding. For example, Freire's (1973) approach to adult literacy education is based in specific strategies that educators can adopt and manage. If this strategy is successful, a socially responsible citizenry is enhanced.

The second dimension, narrative versus metanarrative, addresses the robustness of the critical imagination. This dimension explores issues related to the decontextualized resilience of social theory. Metanarrative in this context, refers to social theory useful for explaining phenomena across different cultural contexts. The first two generations of critical theorists argued that the logical structure of critical theory was the same, regardless of cultural context, historical development and type of domination (Murray, 2022).

In contrast, narrative in this context assumes there are multiple forms of empirical domination and that these result from unique histories and contexts (Murray, 2022). Although these critical theories overlap and share philosophical structure and logic, they are tailored for specific issues and phenomena (Murray, 2022). Third-generation critical theorists insisted that social problems must be understood within the cultural context from which they emerge. Thus, for example, we see the development of gender studies, critical race theory, critical ecologies, queer theory, critical legal studies, critical accounting, critical communications, critical marketing and so on. To be sure, a critical theory designed to raise awareness about the age of surveillance capitalism might be different than a critical theory designed to address and combat climate change. Within marketing, the relationship between these two dimensions is manifest in three progressive consumer research communities that encourage and support critical research.

### **Consumer Culture Theory (CCT)**

CCT is positioned along the negative/metanarrative dimensions. This means its orientation bends toward being critically diagnostic and deeply theoretical, creating a decontextualized set of ideas that are relevant across multiple contexts. Although the roots of interpretive or hermeneutic consumer research extend back to the mid-1980s (Hudson and Ozanne, 1988), this perspective is most strongly associated with the influential article published by Eric J. Arnould and Craig J. Thompson in 2005. The authors discuss the importance of systems of meaning that tend to channel and reproduce consciousness in such a way as to defend the dominant interests in society. This is consistent with the logic and method of critical theory. From a CCT perspective, consumer culture is conceptualized as a ‘densely woven network of global connections and extensions through which local cultures are increasingly interpenetrated by the forces of transnational capital and the global mediascape’ (Arnould and Thompson, 2005, 869). More specifically:

The forces of globalization and postindustrial socioeconomic transformation have significantly eroded the traditional bases of sociality and encouraged instead a dominant ethos of radical individualism oriented around a ceaseless quest for personal distinctiveness and autonomy in lifestyle choices (873).

This is consistent with both second- (Habermas, 1984) and third-generation (Poster, 1989) critical theorists. Methodologically, CCT is infused by a spirit of critical reflection and paradigmatic reinvention (Arnould and Thompson, 2005, 870, see footnote).

In terms of connection, CCT is more than a paradigmatic orientation. It is also an association that meets annually in Europe or the Americas, providing encouragement and support for the critical-emancipatory approach in consumer research. CCT is a community that connects critical researchers with each other, creating a sense of belonging and purpose that can be sustained across time and space. In addition, it provides a platform from which critical consumer

researchers can advocate for their orientation, creating the possibility for critical perspectives to grow and prosper into the future.

### **Transformative Consumer Research (TCR)**

TCR is positioned along the positive/metanarrative dimensions. This means that its critical orientation bends toward being restorative and remedying. This moment in the critical imagination seeks solutions to specific concrete problems, asking: how can we make society better? From this perspective, concrete problems are not associated with a specific segment or group of society, but significant problems are identified across cultural contexts. TCR grew out of the Association of Consumer Research, as more and more researchers called for research on wellbeing and the ethics of consumption. In this sense, TCR strives to encourage, support and publicize research that benefits quality of life for all beings affected by consumption practices around the world (Mick et al., 2012).

Julie L. Ozanne and Bige Saatcioglu best describe TCR's critical orientation in their formative article '*Participatory Action Research*' (PAR; 2008). This article explains the axiology, ontology, and epistemology of PAR, which is consistent with the purpose and intent of TCR. The axiology of this orientation is to improve human welfare by working to 'provide workable solutions to immediate concerns and to develop local human capacities' for groups of people (Ozanne and Saatcioglu, 2008, 424). The ontology of TCR's critical orientation is that culture is cocreated, context-bound, relational and situated. Within this set of circumstances, political and economic interests drive cultural practice. It is also assumed people possess the potential for agency if they become aware of constraints on their freedom. This is consistent with the logic and method of the critical imagination. From an epistemological perspective, this orientation assumes that phenomena should be analyzed within the historical context from which they emerge. In addition, solutions to problems should be negotiated with participants, and theoretical explanations will always be built in partnership with them. Here, the researcher is not viewed as separate or external; they are deeply involved and connected as actors in the phenomenon.

Like CCT, TCR also is an association; it meets somewhere in the world every other year. The purpose of these meetings is to provide space for dialogical teamwork to solve specific social problems and pursue specific research projects. Here, senior researchers are often paired with junior researchers, creating a cultural mechanism for mentorship and advocacy, and helping newer scholars develop their critical orientation over time.

### **Gender, Markets and Consumers (GENMAC)**

GENMAC occupies a unique position in our perceptual map. GENMAC is both negative and positive, with an analytic focus on how gender identity shapes social justice. This means it is both diagnostic and restorative, focusing on the gendered nature of marketing and consumer behavior, along with the underlying economic and power relations embedded therein. Pauline Maclaran's seminal article '*Marketing and Feminism in Historic Perspective*' (2012) provides a useful overview of this critical orientation. She tracks the evolution of the key debates across three distinct waves in feminist thought, from the 1900s until the present day. Each wave takes a different stance on the key debate underlying the relationship between feminism and marketing: does marketing exploit or empower women?

In her ground-breaking work *Fresh Lipstick*, Linda Scott (2005) argues first-wave feminists were happy to use marketing tools and techniques to further their cause. At that time, women valued and needed marketing to gain converts to causes, organize social movements, enact demonstrations, diffuse arguments and change laws. During this wave, the market and feminism were not necessarily opposed; indeed, marketing techniques were empowering. Here, critical theorists reveal that women used the techniques available at the time to promote change within key aspects of social structure.

In contrast, second-wave feminists drew heavily on the neo-Marxist themes of critical theory to suggest marketing and advertising were exploiting women and reinforcing patriarchal hegemony. Betty Friedan's *The Feminine Mystique* (1963) argues that women's magazines, the education system, popular media and the advertising industry constructs and reinforces cultural roles for women that sustain patriarchy. This reinforcement keeps women subservient and ultimately leads to social pathologies such as alienation, anomie and estrangement.

Third-wave feminism, which emerged in the 1990s, is much more concerned with a woman's right to pleasure and to determine her own sexuality (Maclaran, 2012). It plumbs the construction of femininities that intersect with race, ethnicity, religion, sexual diversity and social class. This intersectionality produces a multiplicity of subject positions (Crenshaw, 1989). Unlike the second wave, which implicitly views women as victims, this wave reconciles feminism and consumption, linking empowerment to sexual expressiveness.

Like TCR, the GENMAC association meets somewhere in the world every other year. This association seeks to bring together voices of all constituents interested in gender studies and serves to connect and support a community of like-minded scholars, many of whom have contributed to recent handbooks about gender that include critical perspectives (e.g. Maclaran et al., 2022).

## CONCLUSION: LOOKING TO THE FUTURE

Earlier, we noted critical theory has a long history of adapting its ontology to new historical contexts. Although the logic of critical theory remains the same, the way one conducts critical research, and the cultural contexts in which it is applied, change over time. Today, new social problems resulting from social media, the internet of things, predictive analytic algorithms, behavioral data, surveillance capitalism and artificial intelligence create new challenges for critical theorists. Even the nature of oppression and domination is changing. In the past, critical theory has emphasized *discipline*, a type of power embedded in a disciplinary apparatus that socializes individuals to conform. Because the disciplinary apparatus is distributed throughout a social system, it is everywhere. Over time, this reifies the status quo, creating the natural taken-for-granted world (Murray, 2022). By contrast, surveillance capitalism has created the possibility for *control*, a type of social engineering hidden from everyday life. Predictive analytic algorithms tune, shape, herd and condition behavior by manipulating environmental contingencies. Hence, power is strategically managed by an external source. In short, those who manage this environment become the architects of oppression (Murray, 2022).

This phrase, *surveillance capitalism*, was coined by Shoshana Zuboff (2019), who argues that a new modernity is changing the very fabric of society. A new breed of data capitalist, pioneered by Amazon, Apple, Facebook and Google, is motivated to generate behavioral data based on our everyday lived experience (Murray, 2022; Zuboff, 2019). For Zuboff, this

creates a new economic order that claims human experience as free raw material exploitable by the commercial practices of extraction, prediction and behavioral modification. As a silent, invisible form of social control churning in the backstage of our lives, this force is significantly different from institutional socialization or a disciplinary apparatus (Murray, 2022). Looking to the future, young scholars engaging in critical research agendas will be working to adapt and apply the logic and method of critical theory to these types of challenging contexts.

We wrote this chapter to offer an introduction to critical theory and as a starting point for scholars interested in pursuing a critical research agenda. *Thinking* explicates the logic of critical theory and how it differs from traditional social theory; *doing* presents a processual method of critical theory applicable in a wide range of empirical and cultural contexts; and *connecting* offers a road map for new researchers, helping them find ways of becoming part of active and creative critical communities.

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## 10. Critical visual analysis: advertising, branding and identity

*Jonathan Schroeder and Mark Buschgens*

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### INTRODUCTION

Marketing often relies on strong visual identity. Products and services are promoted via images, corporate image commands increasing attention, and images of identity pulse through marketing communication, consumer households and social media. Many battles of the brands take place in the visual domain. Furthermore, the digital environment and proliferation of image-based content on the web, social media and other digital environments mandates visualizing almost every aspect of corporate strategy, operations and communication. Clearly, visual issues are lodged in the mainstream of strategic thinking and are likewise spurring research and thinking about perceptions and preferences of visual displays in marketing.

Critical visual analysis offers researchers an interdisciplinary method for understanding and contextualizing images – crucial concerns, given the cultural centrality of vision. If marketing depends upon brand images, corporate images, product images and images of identity in both on and offline environments, then research methods in marketing must be capable of addressing the issues such images signify. By connecting images to the cultural context of consumption, researchers gain a more thorough – albeit never complete – understanding of how images embody and express cultural values and contradictions.

This chapter, revised and updated since appearing in the first edition of this *Handbook* (Schroeder, 2006) presents qualitative methods for researching images, including brand and advertising images, film and photographs. We draw on a theory of visual consumption to show how cultural codes and representational conventions inform contemporary marketing images, infusing them with visual, historical and rhetorical presence and power.

### A VISUAL ANALYTICAL TECHNIQUE FOR REPRESENTING IDENTITY

To illustrate how theory informs critical visual methods, we invoke an analytical concept of *consuming difference* to describe a relational framework of contemporary branding campaigns. Specifically, we discuss how marketing communication draws upon the ideology of the group portrait as a visual technique for representing identity. We treat advertising imagery much the way art historians treat pictures, as we analyze illustrative examples through the classic art historical techniques of formal analysis, compare and contrast, and interpretation – framed within representation understood as a cultural practice.

Identity, and how it functions within visual consumption, is a key concern. In discussing identity issues such as gender, race/ethnicity and sexual orientation, we consider how advertising functions as representation within the social contexts of cultural difference (e.g. Buschgens

et al., 2020; Gurrieri et al., 2016; Schroeder, 2021). We offer a short tutorial on the basic issues of criticism and then apply these to contemporary images. This should prove useful for generating ideas for visual research involving Google images, big data and AI-generated images as well.

CK Everyone's ad from Calvin Klein's summer 2020 campaign promotes a fragrance inspired by the brand's iconic scent, CK One (see Schroeder, 2006). Photographed by Glen Luchford, these ads illustrate how CK Everyone draws upon several distinctive visual genres, including group portraiture and fashion photography. Group portraits, genealogically linked to the golden era of Dutch art, are a masculine genre. Historically, men inhabited most portraits of groups such as guilds, corporate boards and sports teams. In contrast, fashion photography is considered a feminine genre, more closely associated with images of women than men, although historically men dominate the scene behind the lens. By juxtaposing and superimposing various gendered genres – the group portrait and the fashion photograph – the CK Everyone images create an androgynous atmosphere, subtly supporting its brand identity as a nonbinary cologne. Thus, genre delineation provides a powerful theoretical insight into how CK Everyone works as an image and a brand strategy, and how it builds upon Calvin Klein's rich, and at times, notorious heritage.

This interdisciplinary analysis illuminates key tensions within the politics of representation, identity and marketing. Fields in the humanities provide theoretical tools to understand image genres, content and narrative, whereas those in the social sciences afford methods for discussing context, effects and strategic implications (cf. Langley et al., 2023). To be clear, the approach introduced here need not rely on structural understandings of semiotics. Rather, critical visual analysis remains open to consumer response and poststructural notions of image production and consumption. Questions appropriate to critical visual analysis include: How do images communicate strategically? How do images circulate in consumer culture? How do images relate to brand meaning? What does the rise of the internet and digital age mean for visual consumption? What are some ethical and social implications for the reliance on images in marketing communication? How do images foster, challenge, disrupt or engage with dominant narratives and perspectives in consumer culture?

## RESEARCHING VISUAL CONSUMPTION

Visual representations in marketing can be considered sociopolitical artifacts – creating meaning within the circuit of culture beyond strategic intention, invoking a range of issues formerly reserved for the political sphere, and widely circulating information about the social world. Researchers have cited cultural codes, ideological discourses, consumers' background knowledge, and rhetorical processes as influences in branding and in consumers' relationships to advertising, brands and mass media (Minowa and Belk, 2017; Schroeder, 2009). Consumers construct and perform identities and self-concepts, trying out new roles and creating their identities within, and in collaboration with, brand culture. Largely missing from these insights, however, is an awareness of basic cultural processes that affect contemporary brands, including historical context, ethical concerns and consumer responses. In other words, neither managers nor consumers completely control branding processes – cultural codes constrain how brands work to produce meaning (Schroeder, 2009; Wu et al., 2013).

There are many ways to begin analyzing a work of art, photograph, advertisement or brand stimulus, but most critics agree interpretation begins with description. Basic descriptive work requires articulation of form, subject matter, genre, medium, color, light, line and size – the building blocks of images. Some art-historical knowledge is helpful for identifying form and genre and making comparisons across images. When working with photographs, for example, relevant descriptive variables include production qualities, the photographer's vantage point, focus and depth of field; each constitutes aesthetic, ideological and strategic choices (Barrett, 2020). The relationship between description and interpretation is intricate, but ideally, interpretations emerge from descriptive details. Researchers may also benefit from one of the many guides to visual methods (e.g. Barnet, 2014; Kress and van Leeuwen, 2020). In the following, we present key variables for critical visual analysis: description, subject matter, form, medium, style, genre and comparison.

## Description

The first step in critical visual analysis is to describe the image, pointing out features within it such as formal properties of composition, color, tone and contrast. This level of analysis will be most uniform among observers, varying in terms of visual knowledge, language and jargon. Of course, the interpreter's background plays a role in interpretation, and knowledge or familiarity with historical and cultural contexts will influence how researchers engage with analytic categories. A basic descriptive technique involves placing the image within a genre or type, largely dependent upon subject and medium. Genre categories are not wholly separate, and it is often impossible to prevent interpretation from seeping into description (cf. Sturken and Cartwright, 2017). A key step concerns placing images within context, which might entail discussing a brand's heritage.

For example, Calvin Klein's marketing campaigns have sparked a mixture of controversy and comment for more than 40 years (e.g. Klein, 2017; Schroeder, 2002). Sensationalized sex appeals typically infuse Klein's ads, building his company's fame and ensuing brand equity, and generating media attention via what has been called 'the strategic use of scandal' (Schroeder, 2000, 36).

Introduced by Calvin Klein in 1994, CK One is a fragrance initially marketed to both sexes. Flash forward to 2020, when it was repositioned as a gender-neutral scent that could be worn by anyone. 'I am one. I am many. I love everyone of me,' reads the ad copy (see CK Everyone, 2020a). Interestingly, CK Everyone deviates from the brand's historic focus on sexual appeal, highlighting the wearer's confidence, embracing their own gendered identity. The new fragrance of orange, ginger and cedarwood was another success for Calvin Klein; the campaign's emphasis on inclusivity, diversity and embracing one's authentic self proved relevant to teenagers, millennials and Gen Z consumers alike.

As an advertising exemplar, CK Everyone provides a compelling series of images for critical visual analysis. As an influential icon of 1990s visual culture, CK One ads have been cited, referenced and parodied by many other brands. The Whitney Museum of American Art showcased an exhibition of images from the campaign (Francis and King, 1997). Today, dozens of websites and social media feeds feature variations of CK Everyone images, as the brand used Instagram, TikTok and other social media platforms to generate content. Calvin Klein's most recent relaunch (in 2020) cast six diverse and relatively unknown models in a series of ads that represent both an homage and an evolution of the iconic 1994 CK One campaign.

Like so many image-based ads, those in the CK Everyone campaign provide little information about the product's physical attributes. Instead, the ads promote an emotional connection between the models in the photographs and the brand. Consumers are asked to transfer meaning from the identity of the people in the ad – their image, lifestyle and physical appearance – and the ad's visual style, onto the product. Therefore, it is critical to understand how the ad visually constructs meaning.

### **Subject Matter**

A useful starting point for descriptive analysis is to identify and describe persons, objects, places or events in a photograph (Barrett, 2020). CK Everyone ads appear primarily within the digital environment, along with large digital outdoor displays in major cities (e.g. London, New York, Paris). As noted above, CK Everyone leveraged popular social media platforms to showcase campaign images, videos and behind-the-scenes content, and used targeted hashtags (e.g. #CKEveryone) to increase its reach and user-generated content.

Many variations exist of the basic CK Everyone ad. Images of six models (i.e. Eliot Sumner, Evan Mock, MLMA, Priddy the Opp, Cara Taylor and Park Van Noorde) pervade the campaign. In one example (see CK Everyone, 2020b), three models are depicted as a group portrait consisting of eleven people; Cara Taylor is replicated four times, Evan Mock three times, and Eliot Sumner four times. Some images face the camera, while others look elsewhere or at other variations of themselves. The models interact and touch their other selves in loving and affectionate ways, but never interact with another model. For example, in one variation Taylor puckers her lips to blow a kiss to her other self, which is greeted by a surprised yet consensual expression. The models are placed together in different combinations for use on different digital channels and are at times featured as a group portrait alongside the other photographed variations of themselves.

The physical appearance and arrangement of the models as they contrast variations of themselves, as well their placement next to other models, contributes to the ad's essence. As a group, the models appear different, and multicultural, in ways not often seen in major ad campaigns of the time. In another version of the ad (see CK Everyone, 2020c), the models again interact only with themselves. Priddy the Opp is covered in tattoos and featured twice in his underwear, both looking at and away from the camera while embracing himself as a means of comfort. Two variations of a clothed Sumner look at the camera, as one embraces the other. MLMA and a pink-haired Mock appear twice, mostly facing the camera, either clothed, semi-clothed or with tattoos.

In prior CK ads, a highly recognizable model (e.g. Kate Moss in the 1994 campaign) often appeared (Schroeder, 2006). However, for CK Everyone no one model stands out notably from the rest; rather, each is treated as equal. The iconic CK name, logo and bottle are prominently displayed on the ads, providing a visual anchor and hook for the ad to guide its interpretation. The Calvin Klein name acts as recognizable visual text in conjunction with the addition of the word 'Every' in the established CK 'Every' One fragrance line. The 'Everyone' message is further reinforced by the composition of the photographs in the ads, as well as additional copy that trace the silhouette outline of the models (e.g. 'I love their story, I love her insecurities, I love his laugh'). As noted above, this copy speaks to the variety of selves and gender identities represented.

## Form

The next variable is form, which refers to how the subject matter is presented. The CK Everyone ad features colored photographs of people who seem to represent a diverse range of ethnicities and orientations in society. A muscular, tattooed, Black Priddy the Opp is placed next to a more fragile, longhaired white Sumner and a sassy, sexually confident Korean MLMA. The images play to several audiences, appearing to subvert visual advertising conventions while simultaneously embracing and normalizing societal conceptions of identity, sexuality and difference. They appear like *collages* – assemblages of various images to create a group portrait without the group necessarily occupying the same space. Specifically, they might be called *photomontages*, a type of image more prevalent with the increasing use of digital tools (e.g. Photoshop) to create assemblages of photographic images.

## Medium

Medium refers to the material form of an object or image – canvas, wood, paper, bronze and so forth. The medium of the CK Everyone ad is a series of unsaturated color photographs that appears in both print and digital displays. The use of unsaturated color film makes this image appear somewhat subdued, highlighting a rawer simplicity and minimalism, consistent with many advertisements of the era. The medium also imbues the image with contemporary fine art status, as contemporary art photographs tend to be color. Color photography dominates image-based platforms such as Instagram, possessing high rhetorical power because it conveys emotion and visual interest. In conjunction with the ad's copy (i.e. 'I love their smile', 'I love every one of me'), the color photographs reinforce the emotional connection behind the message of loving 'every one' of your selves, by embracing Calvin Klein cologne.

## Style

Style refers to how aesthetic objects resemble each other, either in the way they look, how they were created or the themes they reveal. Advertising photographer Glen Luchford, known for his use of vibrant color and lighting, is considered among the most influential fashion photographers of his generation. When shooting the CK Everyone ads, he drew inspiration from iconic 1990s advertising imagery, while updating these campaigns to create a modern and fresh interpretation.

For example, Luchford updates prior CK One ads by incorporating colored photographs yet leans into photographer Steven Meisel's version for the 1994 ads, which were photographed in the style of influential fashion photographer Richard Avedon. Like many Avedon photographs, Meisel's CK One image and Luchford's CK Everyone images feature a plain white background that serves to de-center and de-contextualize the subjects. The CK Everyone ad, like those before it, is also a nod to Avedon's famous 1960s photograph of Andy Warhol's factory crowd (Francis and King, 1997). Indeed, Warhol was well known for his entourage of downtown models, artists and hangers-on.

## Genre

This variable refers to a type or category. Analyzing genre in critical visual analysis requires interdisciplinary sources. Often, a good introductory book from a relevant field offers a useful start – for example, Sylvan Barnet's incisive *A Short Guide to Writing About Art* (2014). A key genre reference for the CK Everyone ad concerns the group portrait, which became established in the Golden Age painting of Holland, when Dutch painters moved beyond pure description to idealize their subjects and portray a glimpse of their personalities. A well-known example is the 'Dutch Masters' portrait that appears in packages and advertisements for a popular brand of cigars. The Dutch group portrait genre usually represented private guild commissions who wished to celebrate solidarity and good fortune. The basic requirement of group portraiture 'was to organize a number of portraits of equal individual distinction into a coherent whole. One solution was to portray the group in one single row, unevenly spaced and further differentiated by agitated gesticulation and a variety of different and occasionally *rather weird poses*' (Fuchs, 1978, 95, our emphasis).

The CK Everyone ad models are also oddly posed – they are lined up in a row to form a group, and pictures are placed together with other models either in the same row or in additional rows above and beneath, producing an odd montage of bodies. One visual theorist offers a clue to this configuration by arguing that the elements in an ad need to signal something different than a mere photograph: 'the disposition of each sign-value on the page must not be normal, rather, the positions must be other than ordinary ... such that an interaction of their visual and conceptual aspect occurs' (Triggs, 1995, 86). Thus, the CK Everyone ad's rather weird poses directly contribute to the conceptual meaning – the consumers shown are 'different;' they use CK Everyone.

From a critical visual analysis perspective, pictures of groups in ads 'are not random collections of persons but deliberate constructions of the significant relationships among them' (Brilliant, 1991, 92–3; see also Dunagan, 2018). Group portraits, for all their seeming spontaneity, reflect and inscribe a strict social hierarchy within the ideology of the group portrait (Schroeder, 2002). Dutch art is art of the here and now, anchored in the daily activities of the middle class, preserving and recording the manners and mores of an entire society (Hodge, 2020).

For comparative purposes, a relevant example of Dutch group portraiture is Cornelius Ketel's dramatic group composition *The Militia Company of Captain Dirck Jacobsz, Roosecrans*, c. 1588. Hanging in Amsterdam's Rijksmuseum, it is credited as the earliest known group portrait that depicts its subjects in full length, rather than sitting down or in close-up (see Figure 10.1). Comparable to several versions of the CK Everyone ad, we see a jumbled group posing for a picture, arrayed in apparent random order and presenting a mixed social tableau. The men are portrayed at odd angles, lacking uniformity, and imparting a dynamic composition to what is largely a static image. Each has an assigned place within the portrait, based on rank, favor, and, often, payment to the artist (Hodge, 2020). Guild membership unites the subjects – they represent a group linked by common membership in a militia company. As in most portraits, closer inspection reveals a mannered series of poses, calculated and scripted for a particular effect.

We find these two images – a portrait from sixteenth century Holland and an ad campaign from twenty-first century America – to be somewhat similar, disparate as they are in time, place and purpose. Each represents group identity through visual conventions. In the Dutch example, *production* constitutes membership, as guild members produce something



Source: <https://www.rijksmuseum.nl/en/collection/SK-C-378> (Public Domain).

Figure 10.1 *The Militia Company of Captain Dirck Jacobsz, Roosocrans c. 1588, Cornelius Ketel, Rijksmuseum, Amsterdam*

in common. In the CK Everyone ad, *consumption* implies membership, as we assume the group members share use of the promoted fragrance. This is not to suggest that Calvin Klein consciously or unconsciously set out to imitate Ketel's painting – particularly given that the composition of the portrait in the campaign is altered to fit multiple print and digital environments. Even so, Saturday Group, Calvin Klein's in-house ad agency, certainly is informed about Dutch art. For instance, the CK Everyone ad (see CK Everyone, 2020b) is composed similarly to Dutch painter Dirck Barendsz's work, whose *Banquet of Eighteen Guardsmen of Squad L, Amsterdam* (known as *The Perch Eaters* c.1566) depicts a group that is three tiers in height and cropped (see Rijksmuseum, 2023). We suggest such resonance between images in the artworks and the ad reveal an important antecedent in CK Everyone's visual genealogy.

Art-historical conventions influence contemporary images directly and indirectly: directly through their impact on pictorial conventions, artistic and photographic training and the cultural capital of specific images, and indirectly through the power of art as a cultural process that over time produces a mode of representing and seeing the world. CK Everyone ads build on the visual past, reminding us of a tradition of artistic expression, and re-present images that are celebrated and valued.

### Comparison

The rationale for including comparison in critical visual analysis is to contrast the unique features of an entity to something similar yet different (Barnet, 2014). One salient comparison in the CK Everyone campaign is with the brand's previous advertising campaigns. For example, the blank-background group portrait motif reoccurs in Calvin Klein marketing, with the 2020 campaign strikingly similar to the brand's iconic mid-1990s efforts. Furthermore, the group theme recurs in many contemporary ads, reminding us of the basic structure of social inter-

action, brand communities and representational conventions (Leiss et al., 2018). The Italian brand Dolce and Gabbana often groups likeminded consumers in their eye-catching campaigns (see Dolce and Gabbana, 2021).

## INTERPRETATION AND EVALUATION

Gender, race and class have emerged as three crucial contextual issues for interpretive work (e.g. Borgerson and Schroeder, 2018; Buschgens et al., 2019). To formulate interpretive conclusions about the CK Everyone ad's meanings, we draw upon work in advertising and consumer culture that interrogates how marketing imagery represents identity. We focus mainly on gender, but also consider issues of race and class. We conclude by placing CK Everyone within a frame of consuming difference.

### **Gender**

The issue of gender spans the realm of the individual, social and cultural (Schroeder, 2003) and marks a critical issue in art history and art criticism (e.g. Jones, 2012). Goffman turned to advertising to demonstrate how gender roles are inscribed in what appear to be natural expressions, situations and poses (Goffman, 1979; Lemert and Branaman, 1997). Like painted portraits, ads are carefully constructed for rhetorical effects. Goffman (1979) argued that ads are part of the real world and a powerful influence on our self-concepts, how we view right and wrong, how we conceive of living a good life, and how subjects perform gender.

Gender critically marks difference. For instance, Judith Butler's concept of gender performativity marks difference in ad images, highlighting how dominant discourses shape gender norms and representations (i.e. ad images aimed at a male gaze) and in so doing marginalize nonconforming identities and expressions (Butler, 2010). Contemporary feminist philosophy further recognizes the importance of difference in gender, which for ads means shifting visual representations to go beyond traditional gender binaries to be more diverse and inclusive (Schroeder and Borgerson, 2004). In analyzing advertisements and social interaction, Goffman showed that 'every physical surround, every box for social gatherings, necessarily provides materials than can be used in the display of gender and the affirmation of gender identity' (Goffman, in Lemert and Branaman, 1997, 207).

Most colognes are marketed to either men or women as an integral part of gender identity and sexual attraction (cf. Stern and Schroeder, 1994). CK Everyone deconstructs this connection – a fragrance does not have to be only for a man and a woman. However, Calvin Klein markets most of its other well-known scents (e.g. Obsession) to women *or* men, and has not discontinued this strategy in the recognition that fragrance can be gender neutral. Simply put, CK Everyone may represent only one more market segment, which arguably does little to disrupt or question entrenched gender roles and gender segmentation.

### **Race**

A crucial contextual issue concerns how racial identity is depicted in the history of art and advertising. One might argue that compared to prior iterations of the CK One fragrance line, CK Everyone works to break down racial barriers via its multicultural milieu. Its images are

not quite as stereotypical as in its preceding campaigns. But it may be the case that by including images of marginalized segments of society some of the same harmful processes of racialization are at work (see Borgerson and Schroeder, 2018; Harrison et al., 2017). For example, depictions of Black Priddy the Opp and Korean MLMA appear more aggressive than those of the White models. Although not appearing angry or hostile toward themselves or others, they are more domineering, conveying strength over a meeker Eliot Sumner and Cara Taylor.

### **Class**

Appearance marks social class. In contemporary ads, class is often revealed through flawless skin, expensive clothing and accessories, exclusive objects and luxurious settings. In the CK Everyone ads, class is invoked as an indicator of success. That is, the models may not necessarily appear to come from higher classes, but generally they have enjoyed success. Most are young, attractive and healthy.

## **THEORETICAL INSIGHTS: CONSUMING DIFFERENCE**

The concept of consuming difference offers a productive lens to analyze contemporary branding campaigns that draw upon and highlight codes of identity that represent and emphasize difference – that is, highlighting ethnicity, gender, race and/or social class to create an implicit visual contrast to more mainstream notions of identity. Many marketing campaigns present difference in ways that evoke contrast. For example, ads might focus on various skin tones of models by close-cropping body parts, making skin color difference appear as the key aspect of consumer focus, rather than any shared identity (see Borgerson and Schroeder, 2018; Harrison et al., 2017). Or ads might pose someone ‘different’ – often a ‘native’, dressed in apparently traditional clothing, within a ‘contemporary’ milieu, perhaps using a mobile phone or other high-tech device.

In other words, difference often functions as a branding technique to represent ‘authentic subculture’ or ‘diversity’ (see Gopaldas and DeRoy, 2015). In this way, Schroeder (2006) critiqued the original 1994 CK One campaign as an exemplar of consuming difference. The CK Everyone ads, while apparently embracing contemporary interest in diversity, also invite consuming difference in their juxtaposition of various models and performers – linked only by their appearance within the ad.

## **VISUAL GENEALOGY, CRITICAL ANALYSIS AND RESEARCH INSIGHTS**

Many insights emerge from critical visual analysis that would be difficult to generate with traditional social science approaches. Links to the tradition of fine art serve to remind us that advertisements possess a visual and historical genealogy. For example, the CK Everyone ad is emplaced within the art genre of the portrait, particularly guild portraits associated with the Dutch masters – mainly a masculine tradition. The form of the ad is, of course, situated within the world of fashion (and specifically fashion photography) – largely a feminine realm. We

argue that recognizing and analyzing the juxtaposition of these gendered genres affords new insights to the representation and commingling of gender within the CK Everyone ad.

Drawing upon aspects of the group portrait contributed to understanding the perceptual categorization of people pictured within a frame as belonging to a group, or having something in common – what Schroeder (2002) calls the ideology of the group portrait. In other words, there is nothing natural that tells us people who appear together in a frame share some essential identity trait. Rather, we have built up this cultural association to the point where such assumptions now underlie perceptual and cognitive processes of group attribution. When people appear together in a picture, we assume they belong to the same group.

In the CK Everyone images, this perceptual effect contributes to the underlying assumption that the models' pictures share something – their use of CK Everyone. We should realize they may or may not actually use the endorsed product, and that their group membership lasts only a day or two for the shoot. Thus, engaging critical visual analysis reminds the viewer and researcher alike that the CK Everyone group is constituted via their appearance in the image, and the group (or variations of individuals as a group) did not exist prior to or after the photo session. In fact, the ad provides no evidence that the models ever interacted in the same room at all, but were instead assembled in the production of the ad. In contrast, we assume the Militia companies and guilds in Dutch portraits constituted a group before, during and after the portrait making. The CK Everyone group is identified by consumption, the Dutch group by production, visually expressing a complex historical transformation.

Finally, critical visual analysis points out limitations in an information-processing model of consumption, one in which culture, history and style are attenuated. For example, the white space of CK Everyone images – the studio backdrop – does not neatly fit into cognitive models; from a strictly decision-making or persuasion perspective, this space carries no information; it is lost (Pracejus et al., 2006). In contrast, critical visual analysis reveals how white space imbues images with meaning. In other words, white space is not nothing; it helps situate subjects within images, and its use links images to a broader cultural world of aesthetics, luxury, and value.

Critical visual analysis points to the cultural and visual context of ads within the flow of mass culture, underscoring the powerful role marketing plays in both the political economy and the constitution of consuming subjects. A key element of critical visual analysis often entails constructing a visual genealogy of contemporary images, to contextualize and historicize them, and point to the cultural domain of contemporary visual consumption. We have argued that CK Everyone ads exemplify a spectacular combination of old and new representational systems.

A key question remains: Do consumers see these cultural connections in ads? Most are not necessarily visually literate, and historical references and conventions may not consciously inform their viewing. However, just as legions of Harry Potter fans may not appreciate the mythic structure of Harry's heroic journey – which conforms closely to well-known hero stories such as The Odyssey, King Arthur, and Star Wars – meaning emerges from an in-depth interaction between images, heritage and viewers. In other words, cultural and historical conventions shape communication even when consumers are not aware of their influence.

In this way, CK Everyone's target audience has no experience with Dutch group portraiture, the representational conventions of portraiture, fashion and advertising photography impart influence on contemporary visual expression, and the art directors and photographers responsible for producing the ad certainly are aware of the art historical referents we have

discussed. Furthermore, the perennial popularity of Dutch art, spurred by the success of books, blockbuster exhibitions (e.g. the 2023 Vermeer exhibition at Amsterdam's Rijksmuseum), and popular films such as *The Girl with the Pearl Earring* (2003) demonstrate how Dutch images recirculate and resonate through culture.

## CONCLUSION

The interactions of identity, consumption and image represent an urgent imperative of contemporary consumer culture. Critical visual analysis affords new perspectives for investigating specific cultural and historical references in contemporary images. Researchers can take advantage of useful tools developed in art history and cultural studies to investigate the poetics and politics of an image as a representational system. Constructing a visual genealogy of contemporary images helps illuminate how marketing acts produce meaning beyond the realm of the advertised product, service or brand, connecting images to broader cultural codes that help create meaning.

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# 11. Researching technological posthuman futures with thought experiments

*Vitor Lima*

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## INTRODUCTION

‘You are gonna die.’ Period. Many scientists consider this statement a universal and unquestionable truth, especially in Western societies. For many, there is nothing after death beyond our decomposing flesh and bones. But what if we upload our minds to the internet and live forever as data? Would we die or just our biological bodies? Would we still be human beings? What about our legal status as persons? Would our possessions still be ours? Could we own something as dead humans or as living nonhumans? What if we marry an artificial intelligence (AI)? Could we then purchase a robotic body to have physical sex with it? There is no definitive or correct answer to any of these questions. But Ray Kurzweil, Google director and world-renowned futurist, has some ideas that may help us understand such a puzzling scenario. He once argued that, by 2030, humans will be able to choose between a biological and a silicon-based body because our minds could be hosted in the cloud if desired. He also predicted that, by 2045, AI systems will achieve singularity and thus surpass human intelligence (see Kurzweil, 2005, 2020). Although this may sound like a science fiction plot, it is already happening to some extent (e.g. Belk, 2022a; Cave, 2020; Lima and Belk, 2022; Scott-Morgan, 2021; Takhar et al., 2022). And when predictions like Kurzweil’s start becoming a reality, they are no longer the future: they are the present.

We all tend to observe past events and facts to make sense of our existence. Nothing wrong with that. Without critical assessment, multiple interpretations of what has happened, and broader discussions, there would be no corrections, equalizations of inequalities, ethical reassessments or even advances in human rights. And scientific endeavors are no different. When we look at prior marketing and consumer research, studies using qualitative methods tend to work on data collected in the past to theorize about social phenomena (Fischer and Guzel, 2022). But what about philosophical approaches and research methods that may challenge historical taken-for-granted ideas and potentially help us prepare for the future? How can we do research that takes us closer to some version of a future that, for better or for worse, seems to be inevitable?

This chapter offers some possible answers to these questions. Here, posthumanism is a meaningful starting point. This philosophy invites us to rethink the world outside a human-centric framework. A posthumanist perspective prompts a novel understanding of taken-for-granted notions such as subjects, objects, consumers, consumed, owner, owned, natural, artificial, organic, inorganic, male, female, human and nonhuman; and, when considering novel assessments of what the future could, should and would look like, the role of technology in shaping our existence becomes of higher relevance (Ferrando, 2019). One consequence of such a post-anthropocentric view is the reframing of contemporary scientific protocols and the conditions of knowledge production (Braidotti and Hlavajova, 2018). Scientific approaches,

therefore, need to be re-designed if we are to theorize about different types of subjectivities (e.g. sentient AI), embodied entities (e.g. sex robots) and social phenomena (e.g. moving to Mars) that exist or will come into being. And, to understand a future that is unfolding before our eyes, thought experiments, more specifically prefactual thinking, are relevant methodological choices. These mental exercises rely on imagination to create speculative scenarios and challenge ideas, concepts and theories (Epstude et al., 2016; Stuart et al., 2018).

This chapter is organized as follows. First, it presents an overview of the philosophical roots of posthumanism and its view on technology. Then it discusses thought experiments, focusing on prefactual thinking, as a viable and robust method by which to inform marketing and consumer research. Lastly, it concludes with some final insights and invites future research on these topics.

## POSTHUMANISM

Posthumanism is a posthumanistic, post-anthropocentric and post-exclusivist philosophical perspective criticizing the idea of human primacy over others. In other words, it questions historical applications of humanism and its human-centric assumptions, such as speciesism (Braidotti and Hlavajova, 2018). In contemporary debates about the need to reassess the notion of the human, however, ‘posthuman’ has become an umbrella term. It is often used to encompass philosophical, critical and cultural posthumanism (e.g. Ferrando, 2019), transhumanism (e.g. Ranisch and Sorgner, 2015), new materialisms and feminist epistemologies (e.g. Haraway, 1985), antihumanism (e.g. Han-Pile, 2010), and metahumanism (e.g. Deretić and Sorgner, 2016). Such a variety of uses of the term fails to consider each movement’s onto-epistemological perspective, which generates theoretical and methodological confusions (Ferrando, 2019).

All these movements indeed share the perception of the human as non-fixed and ever-changing. But they do not all have a post-anthropocentric approach and past orientation, as in the case of the futuristic transhumanism (Ranisch and Sorgner, 2015). For transhumanists, humans are the point of departure to a new, enhanced ontological posthuman condition through radical biotechnological modifications. This means that some of us will take smart drugs to achieve superintelligence, and others be genetically modified to live longer, smarter and better (Lima and Belk, 2022).

Here, it should be borne in mind that posthumanism does not consider technology as either the ‘other’ to be feared, as seen in Kozinets (2008), or as a divine entity that will guarantee a post-biological future, as desired by transhumanists (see Kurzweil, 2020). The posthuman take on technology focuses on technogenesis: the idea that humans evolved alongside their technologies (Hayles, 1999). We human beings are a technology-aided species and need external tools to survive, meaning there is no separation between technologies and the self (Belk, 2013). And the boundaries between organic and inorganic, human and nonhuman, natural and artificial get blurred when we begin to discuss the emergence of cyborgs, those human-machine hybrids for their embodied technologies (Clynes and Kline, 1960; Lima, 2022), human-like robots and their status as persons (Reynolds, 2018) and AI claiming sentience (Lodewick, 2022).

In this scenario, researchers interested in posthumanism as the philosophical background to exploring possible futures must consider three premises. First, a posthuman future is one

where we, as a society, cannot and should not discriminate against who or what is born from those made. That is, against neither those biologically conceived inside an organic body nor those created in a lab or factory (Belk et al., 2020). Second, it is a future where humans will choose to merge with technology, such as brain implants, to achieve super longevity, super wellbeing and superintelligence (Lima and Belk, 2022). This will be different from the health-care context, where therapy may include pacemakers, for example. In this case, I am referring to volitional cyborgization to achieve a posthuman condition. And thirdly, a future where there is no sharp line separating science fiction from science fact (Belk, 2022b; Takhar et al., 2022).

## THOUGHT EXPERIMENTS

In traditional experiments, researchers work with variables to manipulate, minimize or even eliminate the effects of potentially confounding factors (e.g. willingness-to-pay and preregistration forms). Such manipulations do not invalidate the experiments; rather, they enable researchers to detect and observe usually overshadowed aspects of those very same variables. This is a necessary step in pushing theories to their limits and furthering our understanding of the phenomenon under investigation (Morales et al., 2017). But what about situations where the phenomenon verges on the unreal, immaterial, immoral, unethical or even impossible? For example, how can we investigate the consumption of cryonics services – the attempt to cryopreserve a dead human body for future resurrection (Lima and Belk, 2022) – and its consequences without going against human rights, local laws and religious beliefs? How can we engage with such a posthuman phenomenon and follow research protocols established by ethics review boards? One solution is to use thought experiments.

Thought experiments are creative mental exercises intended to reveal what may occur if particular circumstances are present (Stuart et al., 2018). These are imagined situations constructed to provide insights about the world, its underlying functioning and how individuals experience it (Gordon et al., 2022; Roes, 2000). The physicist and philosopher Ernst Mach is widely credited for naming intellectually based narrative investigations as ‘thought experiments’, or, in the original German, *gedankenexperiment* (Sorensen, 1998). His main idea was to propose new ways of reasoning to avoid inhibiting scientific progress. Such a novel way of thinking can be found in different fields of knowledge, for example, Maxwell’s demon, Newton’s cannonball, Schrödinger’s cat, and the Chinese Room Argument.

As a research method, thought experiments can be used to examine the application of theories in a given context and the consequences of doing so (Ludwig, 2018). Because they rely on freedom of thinking and imagination, they are unrestricted in what concepts they can consider. Thought experiments do not necessarily require us to follow common sense rules, laws of nature, scientific evidence or strict conceptual connections (Ludwig, 2007). Usually, they violate all of these. But this does not mean that freedom in thinking is lawless. Here, freedom follows the rules and laws that we, as researchers, set for ourselves that are reasonable and rational in a given situation.

This means that imagination, as the locus of creative playfulness, is not a place where ideas are absolutely unrestricted. Rather, it is a place where the juggling from one idea to another is bounded by the constraints the imaginer establishes. Although these restrictions are self-imposed and vary greatly in different imaginative contexts, they are all factual elements of the imagined reality. Imagination thus works as a laboratory of the mind, a place where

theories can be created, developed and tested by imposing such restrictions and examining the results (Brown, 2011). The flexible and varied, but nonetheless binding nature, of the restrictions imposed by the imagination enhances the ability of thought experiments to generate intriguing and meaningful insights.

One of the most famous examples of a thought experiment is perhaps Einstein's 'elevator'. In short, he argued that there is no measurement a person can take inside a windowless elevator to determine whether someone riding it can tell if they are at rest in a gravitational field or are being hauled up with constant acceleration (Brown, 2011). Despite its apparent simplicity, Einstein's thought experiment would be tricky to operationalize. For example, to carry out his experiment in reality, a person would have to be rendered unconscious, taken to an area far from any substantial source of gravity, returned to consciousness, and then interrogated about the experience. This experiment can be considered morally, practically and physically impossible. However, this thought experiment is so well structured that it is the basis for the general theory of relativity (Norton, 1991).

Thought experiments can be categorized based on action-outcome and cause-effect linkages (Stuart et al., 2018). Some are highly imaginative and speculative (Norton, 1991), others are nomologically possible (Sorensen, 1998) and yet others are theory-focused (Brown, 2011). Despite their differences, all have a temporal orientation as their common characteristic, as discussed in the next section.

## COUNTERFACTUALS AND PREFACTUALS

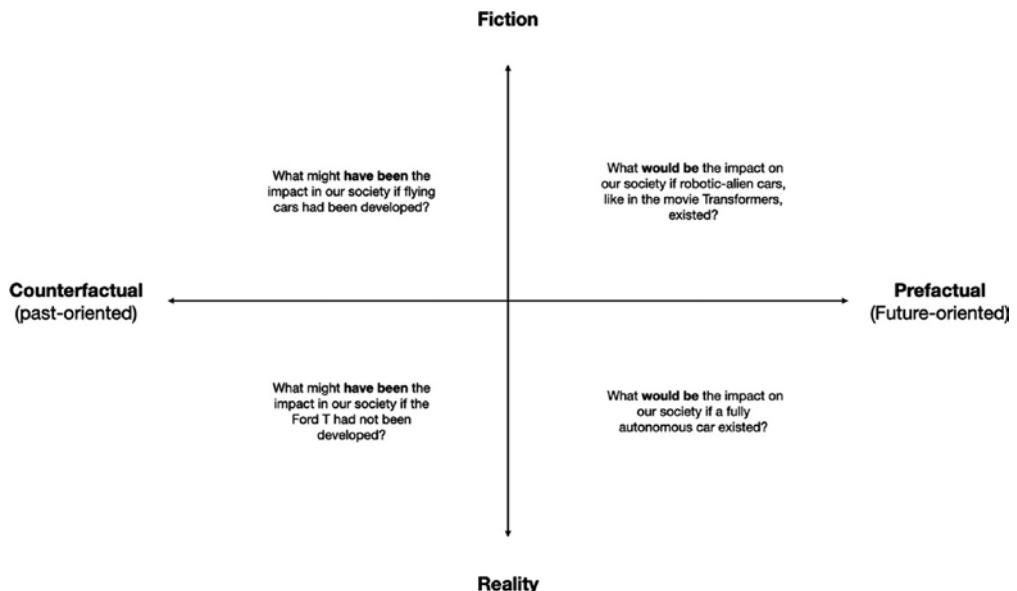
In marketing and consumer research, of all types of thought experiments, the most common is the counterfactual (e.g. Apostolidis, 2021; Krishnamurthy and Sivaraman, 2002; Li et al., 2022; Roese, 2000) followed by the prefactual (e.g. Carmon et al., 2003; McConnell et al. 2000; Vichiengor et al., 2018). Table 11.1 summarizes their key characteristics.

*Table 11.1 Counterfactuals and prefactuals*

Type	Description	Basic logic	Example
Counterfactual	Speculates on possible outcomes of different past events.	What if X had happened?	If I had studied harder, then I would have succeeded.
Prefactual	Speculates on possible future outcomes.	What if X happens?	If I study hard, then I will succeed.

In the case of counterfactual thinking, it helps us learn from our daily experiences because it speculates on possible outcomes of different past events (Roese, 2000). That is, we frequently engage with counterfactual alternatives about what might have been by asking, 'What if X had happened?' This past-oriented type of thought experiment is often associated with complex emotions, such as guilt and blame, and plays a key role in our moral judgment. In contrast, prefactual thinking is a type of mental simulation that assists people in hypothesizing how and whether a particular objective will be accomplished in the future (Epstude et al., 2016). Simply put, it is a type of thought experiment that considers a conditional (if-then) proposition with a future orientation. This means that the value of prefactuals is directly connected to a desired outcome in a given future scenario.

Figure 11.1 illustrates the temporal logic of both counterfactual and prefactual thinking, considering different elements (or conditions) to envision scenarios. In this case, the poles ‘fiction’ and ‘reality’ are arbitrarily placed on the vertical axis to inform research on, for example, the impact of cars on our society. Therefore, discussions can move around fiction and reality, the past and the future, utopic or dystopic scenarios, collective or individual implications and so forth.



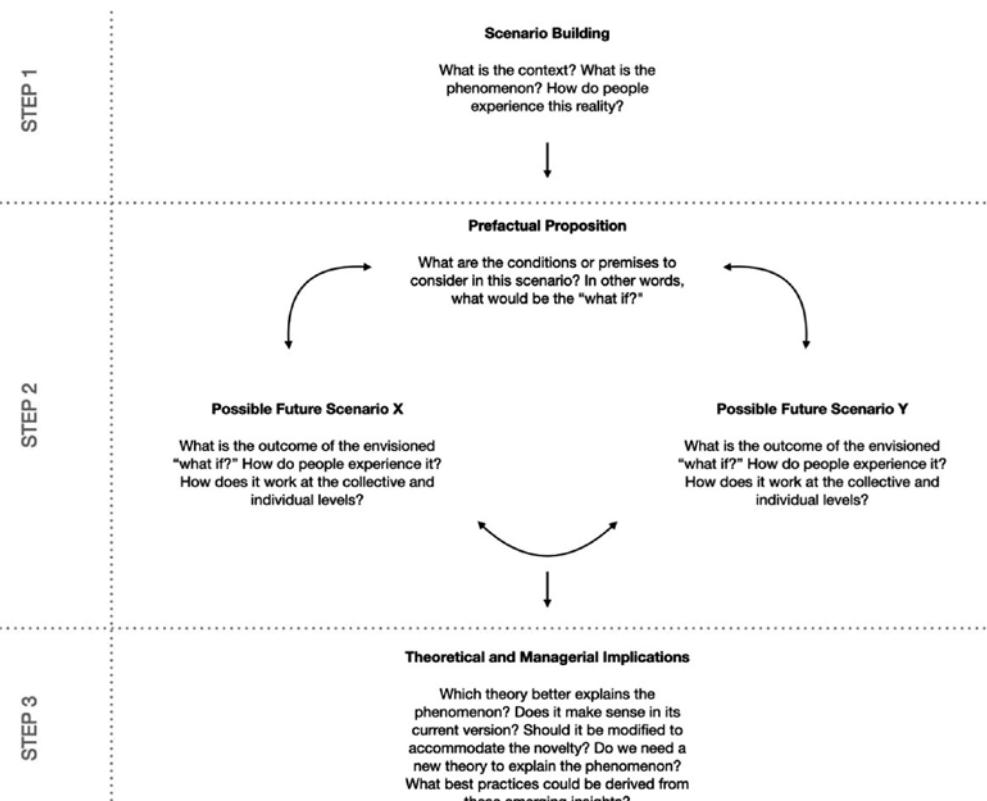
*Figure 11.1 Counterfactuals and prefactuals*

A relevant example of a thought experiment that can be informed by both counterfactual and prefactual thinking is the trolley problem. This has been used to discuss ethics and the development and consumption of autonomous vehicles (e.g. Gill, 2020; Novak, 2020). This thought experiment consists of a series of scenarios involving ethical dilemmas in which an AI must decide, in the case of an accident, whether or not to kill one individual (e.g. the driver) in order to save a group of people (e.g. children), or vice versa. To have a brief but meaningful experience with this thought experiment, the reader can visit the Moral Machine website ([www.moralmachine.net](http://www.moralmachine.net)) and solve some moral conundrums. There, an autonomous car is faced with a choice between murdering two passengers or five pedestrians, and so on. It is then possible to compare the reader’s responses to those of others and consider how these decisions were made. Even if there are right choices, would they truly be right? Should an AI decide something so important? Perhaps more crucially, who is to blame in the case of an accident – the manufacturer, the car, pedestrians, the owner or the driver? Far from providing definitive answers, emerging different past-oriented and future-oriented scenarios could be theorized and inform discussions on creating artificial life, civil liability, personhood and policymaking, for example (Eccles, 2010).

But in the case of investigating technological posthuman futures, prefactuals are the best choice as a posthumanist method. This methodological choice is appropriate because, if we are to engage with the world in meaningful ways, we must imagine elements of the same world that are not currently experienced but may be in the future. The next section thus details the process of working with such a future-oriented type of thought experiment.

### **Working with Prefactual Thinking**

Although there are several possibilities to create a thought experiment using prefactual thinking (Epstude et al. 2016), consider a three-step process, as shown in Figure 11.2.



*Figure 11.2 Three-step process*

#### **Step 1: scenario building**

As a brief example, consider Microsoft's futuristic but controversial new patent as the research context or main scenario. In early 2021, the company patented a conversational chatbot based on data from any human being, dead or alive (see Collins, 2021). As proposed, the app will retrieve data from social media and text messages to replicate a human being as a digital avatar. Once the app has all the needed information, it will potentially create a digital version

of a living human, or ‘incarnate’ dead people, and bring them back to our daily lives. Eerie, creepy and freaky, just like in the haunting episode ‘Be Right Back’ from Netflix’s show ‘Black Mirror’. Despite sounding like a Sci-Fi plot, apps like this are available on the market. For example, since 2017, millions of users have downloaded the app Replika. Essentially, it learns how to be a companion for its user and develops several types of relationships, including dating and friendship (Main, 2023). UneeQ (2023) offers digital humans with conversational skills powered by ChatGPT. And Google (2017) has a patent for digital clones that mimic an individual’s mental attributes.

### **Step 2: prefactual proposition**

A possible prefactual condition, or the ‘if’, could be: *What if* Microsoft develops the chatbot fully and starts offering it as a service? In this case, we can consider the possible outcomes of such an app and its impact on consumers and society. Here, it is possible to work on as many scenarios as needed, considering mandatory contrasts between them following the logic of superior vs. inferior, positive vs. negative, utopic vs. dystopic, or any other opposition that helps with comparisons (Epstude et al., 2016). For example, Scenario 1 could be:

Microsoft launches its service for digital humans, and consumers start paying for it to have beloved dead ones, especially relatives, back in their lives. The basic app allows consumers to have only the chatbot version, but the premium one also offers an avatar for interactions in virtual reality platforms. The consequence is that psychologists question the potential addiction to digital devices and the lack of interest in experiencing life with living people. So, rather than investing time and money in concrete and material experiences, these consumers spend several hours immersed in virtual environments, such as metaverses. There, they purchase so many digital goods and services, often as non-fungible tokens (NFT), as gifts for their beloved digital humans, that some have been experiencing financial struggles.

As for Scenario 2, consider the following:

Microsoft launches its service for digital humans, and consumers start paying for it to have beloved dead ones, especially relatives, back in their lives. The basic app allows consumers to have only the chatbot version, but the premium one also offers an avatar for interactions in virtual reality platforms. The consequence is that psychologists recommend using the app to cope with the grieving process and allow people to develop new forms of relationships with artificial life. Despite being digital versions of deceased people, they are considered ‘real’ humans. They not only have artificial emotions and desires but also personhood. And an important aspect of such a consumption phenomenon is the increasing practice of showering these beloved digital humans with gifts in the form of digital goods, such as NFTs.

### **Step 3: considering implications**

Once the scenarios are set, researchers must work on the discussion and implications. Here, consider theories that might explain the phenomenon or that would be modified given the uniqueness of the very same phenomenon. Take gift-giving and the idea of the perfect gift as brief examples. Gift-giving is an expression of altruistic, agapic love (Belk, 2010; Belk and Coon, 1993). It is removed from monetary aspects that are common in commodity exchanges, it does not need to be material (e.g. it can be an idea), and has no obligation of reciprocity. In

its prototypical form, it can be better understood as the perfect gift. Belk (1996) specifies six features of the perfect gift as follows:

1. The giver makes a sacrifice to give the gift.
2. The giver wishes solely to make the recipient happy.
3. The gift is somehow a luxury in the sense of being unique, not expensive.
4. The gift is uniquely appropriate to the recipient.
5. The recipient is surprised by the gift.
6. The recipient desires the gift and is happy because of it.

From this point on, discussions could go in many directions. For example, it could lead to a theoretical discussion about the notion of a perfect gift as an unselfish act of love. Although consumers may purchase NFTs to please their digital humans as an act of agapic love, it could be a case of ‘impure altruism’ (Andreoni, 1989). That is, consumers may give in order to feel a sense of joy for emotionally reconnecting with their beloved ‘dead’ ones. These digital humans, thus, would be a means to an end: gift-giving would be instrumental and selfish. This could then lead to another discussion point: the idea of making the recipient happy because of a gift. In this case, an issue in the current state of Belk’s (1996) proposition is that, so far, happiness cannot be felt by machines and algorithms. At least not in the same way humans experience it (Belk, 2022a). A few questions may arise: in a technological posthuman future where AI is somehow sentient, how can we conceptualize agapic love in gift-giving? How can we explain the happiness of robots and AI in receiving a gift if this is primarily a human trait? What would be ‘to desire’ a gift for an algorithm? How should marketing managers work on advertising campaigns to avoid overselling futuristic features and deceiving consumers? What policies and governmental regulations could be applied to protect consumer data, be it from humans and nonhumans? Far from being exhaustive, these points of discussion and questions are only examples.

In some cases, working on theoretical and managerial implications will not be easy at first, especially given the unique, speculative nature of technological posthuman futures. However, one way of coping with this is to use abductive reasoning to support the theorization process (Belk and Sobh, 2019). Here, insights emerge from constantly revisiting the phenomenon, defamiliarizing ourselves with what is already known, and conducting alternative casing. In these ways, future research investigating consumption phenomena like Microsoft’s possible new service could allow for many new discussions. These would include consumer responsibilization (e.g. Eckhardt and Dobscha, 2018), technology acceptance (e.g. Belk et al., 2021), marketing communications (e.g. Lou, 2021) and market regulations (e.g. Rashideh, 2020), among other relevant topics.

## CONCLUSION

In this chapter, I have offered some insights and non-exhaustive guidance on researching possible technological posthuman futures. Everything begins with one of our key human traits: imagination. It is this that allows us to envision and prepare ourselves for a future full of known knowns, known unknowns and unknown unknowns. And in the case of technological posthuman futures, I argue that thought experiments, more specifically prefactual thinking, are one of the best methodological approaches to informing future research. This is especially

true because of the qualitative and conceptual nature of such methods and their potential to generate new insights.

I hope this chapter sparks interest in thought experiments and prefactual thinking for informing qualitative marketing and consumer research. So far, most studies relying on these methods, which are quantitative (e.g. Krishnamurthy and Sivaraman, 2002; Li et al., 2022; Roese, 2000), have been lacking in two important ways. First, they have not gone deep into the methodological challenges and opportunities they pose; and second, they have not discussed the ontological and epistemological aspects of conducting investigations using such a future-oriented approach. Therefore, marketing and consumer researchers can advance the field by contributing to novel theorizations about phenomena that today are speculative but tomorrow will be factual.

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## 12. Reflexivity in the social sciences: what it is and why it matters

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### INTRODUCTION

What does reflexivity entail? The term refers to the act of critically thinking about our research context, which involves moving beyond usual practices and exploring how we produce knowledge. Such examination allows us to see ourselves in new ways within the context of our culture, society and time period (Hage, 2012). Thus, at its core, reflexivity is the analytical practice of taking the research's context into account – including the influence that this context wields on the process of gathering and reporting on data. It is a deconstructive exercise that brings into question the researcher, the context, the research output and the subject of research. This chapter will focus primarily on understandings of reflexivity in sociology and anthropology to explore the multiple layers of meaning and interpretation veiled within the notion of reflexivity. We will describe a series of ideas on reflexivity and illustrate how reflexivity can be understood through the multiplicity of meanings it takes from authors, disciplines and critical movements.

### REFLEXIVITY: A HISTORY

The concept of reflexivity has different resonances across disciplines. In anthropology, Marcus and Cushman (1982), Marcus and Fischer (1986) and Clifford (1988) push for a turn to self-reflection. This emphasis resulted in great scrutiny of the term 'representation', with all its notions of objectivity. Since this crisis of representation began in the 1960s and 1970s, the questions of knowledge for whom and knowledge for what have become more commonplace (Burawoy, 2005). In sociology, Bourdieu (2000) refers to the concept of 'de-naturalization' to describe the critical thought processes that allow us to see ourselves and our work in a new light (see also Frangie, 2009; Pillow, 2010). In particular, he emphasizes the importance of historical and disciplinary context in the formation of theory-building.

In anthropology, the term 'de-familiarization' describes the process in which we may move out of ourselves to better understand who we are in relation to cultures other than our own (Hage, 2012; Joy, 1991). This examination of cultures other than one's own is a foundation of anthropology (Marcus, 1994). Historically, anthropologists studied the 'exotic other' as a way of understanding themselves (Marcus and Cushman, 1982; Marcus and Fischer, 1986). Yet even before the 1960s, when literary theory and postmodernism became relevant, discontent emerged about the difficulty of doing fieldwork, evident in personal and confessional accounts, and in those not considering the history of anthropology in colonial contexts.

The postmodern influence in the field, however, has helped to critique the process of doing and writing ethnography. Reflexive anthropologists such as Rosaldo (1993) describe fieldwork as confrontational – even if a community grants permission to pursue it – because, in fieldwork we march into peoples' lives and make of them what we will, often leading to exploitation and betrayal of those who trusted us. Crapanzano (1977) argues fieldwork is thus a form of symbolic violence, even when it does not generate physical violence. With the influence of postmodernism, the field underwent a transformation to give voice to the major discontents that surfaced at that time (Marcus, 1994).

Our current understanding of reflexivity builds on these early conversations, but is now enriched by voices from critical studies, standpoint theory, deconstruction theory, feminist and intersectional theory, and sociologies of power, knowledge and agency (Allen, 2016; Anderson, 1989; Fine, 1994; Woolgar, 1988).

## IMPLICATIONS OF REFLEXIVITY

Within sociology and anthropology, cultural relativism became the jumping-off point for a rise in self-reflection, bringing to the fore questions of meaning creation, value and knowledge, as well as representation. Realist, objective representations were cast into doubt; instead, scholars began to pay increased attention to biography, culture, habitus and event (Joy et al., 2006). As Goffman (1981) notes, the crisis of representation shook the foundations of the social sciences, including the stability previously associated with these fields. In its place came new norms: skepticism towards everything we acquired in our reading, describing and writing of ethnography, and an increase in the practice of deconstruction and reflexivity (Van Maanen, 1988). Ethnographic accounts became increasingly reflexive against the backdrop of a modernist representational regime.

## MULTIPLE PERSPECTIVES ON REFLEXIVITY

### **Methodological and Ethical Reflexivity**

Von Unger (2021) suggests we ought to separate methodological/analytic reflexivity from ethical reflexivity. In methodological/analytic reflexivity, the focus is on how we gather data based on the theoretical and methodological assumptions we make (see also Arsel, 2017; Reyes, 2020). Ethical reflexivity, on the other hand, emphasizes possible implications for the people studied and the sociopolitical contexts (Malacrida, 2007). Von Unger (2021) proposes that we consider 'ethics in practice' as well, which involves addressing ethics as they evolve in the research process (Guillemain and Gillam, 2004). Such openness to ethically complex situations necessitates flexibility and reflexivity on an ongoing basis. Von Unger (2021) argues that ethical reflexivity is needed to: (1) anticipate potential ethical issues in advance; (2) engage in ethics in practice, as identified by Guillemain and Gillam (2004); and (3) reflect on more fundamental issues concerning the role of social science research in society, and vis-à-vis global problems and current inequalities.

Von Unger (2021) additionally emphasizes that a researcher's focus should be broad enough to include the participants we study and the institutions they belong to, with an understanding

that participants might be misunderstood and misrepresented by those in positions of power. Given these problems of power and representation, how can we best present our findings without reproducing inequalities and negatively impacting our most vulnerable participants? Ethical reflexivity can thus encompass methodological reflexivity, as it takes into consideration both participant rights as well as the possible implications of research.

### **Marcus's Four Types of Reflexivity**

Postmodernist thought emphasized the importance of what ethnography does (e.g. mostly cultural translation), with the understanding that our knowledge is limited and incomplete and that we can never subsume cultural differences within our research or writing. There will always be a difference that cannot be assimilated to theory, thus challenging us to rethink how we write our ethnographies. Differences in perspective are therefore given space and the authority of academic research is lessened in comparison to previous decades. Marcus (1994) identifies four types of reflexivity in ethnographic writing. The first involves *reflexivity in all human action* – that is, self-critique that gives rise to confessional tales and polyphony in written accounts of fieldwork and ethnography, without challenging the ethnographic research paradigm (Joy et al., 2006). The second is *positional reflexivity* – a ‘means of overcoming the gendered character of supposedly value-free objectivist discourse’ (Marcus, 1994, 569). Feminists such as Haraway (1988) embrace positional reflexivity as it aligns well with standpoint theory, which recognizes the differing social contexts and the inequities embedded in these positions (Harding, 1992). Marcus’s third type of reflexivity is *experimental ethnography*, which emphasizes the importance of historically sensitive revisions and of critiquing authority, but does not contain a parallel emphasis on political action. The final type, *feminist experiential reflexivity aligned with positional reflexivity*, recognizes the partiality of all claims to knowledge and encourages the inclusion of multiple identities and voices.

### **Reflexivity in Latour and Actor-network Theory (ANT)**

Questioning both the assumptions undergirding the practices of ethnography and the ethnographer’s self-reflections represents the practice of radical reflexivity (Marcus, 1994). Latour (1988), on the other hand, suggests that while this stance is essential to critically understanding the process of knowing, it does not pay enough attention to the known. When anthropologists only bring their subjective being into their ethnography, they do not go far enough. Nor, argues Latour (1987), should these researchers simply produce experimental ethnographies, as these are sterile and misleading. Rather, the researcher’s objective remains to provide a text that is both true and trustworthy. Instead of radical reflexivity and experimental ethnography, he suggests the process of infra-reflexivity, which comes into play when writing a novel: ‘The aim is to write better stories’ (Latour, 1988, 172). Providing simple explanations and co-authorship with scholars from other disciplines makes the work more accessible. Through such approaches, he suggests that ethnographers reduce their emphasis on methodological details and focus instead on style.

Latour additionally proposes actor-network theory (ANT) as a possible way to talk about research contexts and methods. The term ‘actor’ refers to every person and thing, while the

'network' is what brings these subjects together (1993, 241). One cannot be studied without the other, and the power of the actors depends on their position in the network and the number of alliances they can generate. The agency associated with an actant emerges from their position in the network.

### **Positional Reflexivity**

Macbeth (2001) proposes a simplification of reflexivity by identifying two types that encapsulate previous debates in social science literature: *positional reflexivity* and *textual reflexivity*. Although the boundaries between the two are somewhat blurred, textual reflexivity refers to 'those studies and discourses that directly address the work of writing representations [...] by examining and then disrupting the very exercise of textual representation' (Macbeth, 2001, 41; 35). On the other hand, positional reflexivity presupposes the author's position within an ethnography and treats it as self-referential analysis, including a wide range of confessional discourses or experiments in authorial voice (Crapanzano, 1986; Joy, 1991; Van Maanen, 1988). Crapanzano, in particular, draws attention to the privileging of authoritative voices in traditional ethnographies, and the exploitation and power dynamics they embody. Positional reflexivity is disciplined and involves a clear articulation of the ethnographer's situated self (Joy et al., 2006); it reveals how our representation of the world is linked to our position within it. Such analyses questions, as Von Unger (2021) does, hermeneutic understandings and leverages emancipatory possibilities for those who are studied. Often, such analysis has been linked to methodological rigor, as Macbeth (2001) notes: 'positional reflexivity [...] aligns methodological rigor with a critically disciplined subjectivity, decentering not only the sedimentations of the analyst but (reflexively) those of the field itself' (39). In doing so, it brings into the ethnography multiple voices, agencies and interests.

Paradoxically, while the original, authoritative and supposedly objective narrative voice of the anthropologist has been severely questioned and replaced with multiple voices (displaced narrative authority), this new path seems to echo the very premises from which it seeks to break free. As Macbeth (2001) notes:

Tied to a singular, disciplined exercise and authorization, positional reflexivity is epistemic from the outset, and in this light, we would say it recommends a revision of the modern analytic gaze, in common pursuit of an ever more penetrating – and in that sense foundational – field of view. (40)

As Macbeth (2001) posits, just as previous generations of anthropologists used to regard the objective realist account as the only acceptable way to produce new knowledge in anthropology, so too are contemporary researchers delineating only one 'correct' way to perform and produce ethnographic research: through reflexivity. Positional reflexivity, through its methodological turns (Sultana, 2007), endorses a singular mode of knowledge creation in the social sciences, which in turn finds its way into writing.

While not all positional reflexive analysis will necessarily result in textual reflexivity, all reflexive texts are positional, because the authors are identified in the process. Reflexive texts identify and disclose unnoticed authorial voices (Macbeth, 2001). We as readers buy into the skepticism of the ethnographer's claim to authority by accepting these layered texts.

## Textual Reflexivity

While positional reflexivity focuses on research methods and practices, textual reflexivity leaves its trace in the documents that ethnographers produce. Lynch (2000) offers six categories of textual reflexivity: mechanical, substantive, methodological, meta-theoretical, interpretive and ethnomethodological. Mechanical reflexivity, for example, refers to almost habitual or subconscious ways of responding to stimuli, involving the assessment of interactions between self and other.

The six types Lynch (2000) identifies all consider reflexivity to be a method for introspection, but he also describes reflexivity as an academic virtue, one that involves scrutiny of thought and action to gain deeper insights and look inwards (Woolgar, 1988).

## REFLEXIVITY, THE CONFESSITIONAL AND SCHOLARLY CREDIBILITY

Webster (2008) furthers Lynch's (2000) idea of reflexivity as an academic virtue by suggesting it is connected to confessional discourses. Van Maanen (1999) describes confessional tales as involving the identification and positionality of the ethnographer. Ethnographers confess to their hardships and how they overcame them, expressing self-pity as well as the transformation of the self that has occurred (Bowles et al., 2021). They note their character flaws insofar as these contribute to the character-building quality of the confessional tale. Introspection is the core of such ethnographic accounts (Atkinson, 2014). Yet the reader is the one who determines the truth-value of an author's confessional. Confessional tales, notes Van Maanen (1999), have some semblance of objectivity while simultaneously acknowledging its blind spots.

For Foucault (1993), confession is a transformative technology of the self. Confessions are about acknowledging one's shortcomings, yet for Van Maanen (1999), they are about personal biases and character flaws. Along with establishing truth, confessions are aligned with credibility and authenticity. They produce the moral authority of certain descriptions of reality – for the anthropologist, this constitutes the ethnographic account. Certain perspectives become more legitimate in this process.

## Reflexivity and Autoethnography

In anthropology – and in other social science disciplines in which reflexivity has come to the fore – autoethnography is a mechanism by which reflexivity is used to make articulations about culture. The *auto* refers to the self, and *ethnography* refers to the stories that are told. In autoethnographies, we use narrative voice, style, character development, denouement and so on, to engage our audience and provide them a sense of being present with the researcher. Autoethnography is not, however, autobiography, although biographical elements are deliberately introduced in the text to generalize about the culture. Autobiographies are stories that intertwine the development of the self with culture, but are not used to make assessments or articulations about the culture. Autoethnographies thus bridge biography and ethnography.

While autoethnographies came to popular attention in the 1990s, the 1980s laid the foundations for such methods to be used because of the crisis of representation. Reflexivity was the cornerstone of the ethnographies of the 1980s, as the researcher's own experiences, motiva-

tions and perspectives were central to understanding culture. According to Adams et al. (2017), autoethnographies give alternate explanations to the dominant stories of the other. Minowa et al. (2012) suggest iterative introspection as crucial to multi-sited and multi-researcher reflexivity in ethnographic writing. Having inside information allows autoethnographers to provide a unique spin on cultural matters. They do not just give new explanations of their culture: they challenge harmful ethnographic accounts made by outsiders (Adams et al., 2017). Iterative introspection allows a nuanced understanding of everyday lived experiences, making these critical texts available to larger audiences.

There are different types of autoethnographies: *Indigenous ethnographies*, which challenge the perceptions of settlers and Western epistemologies through a combination of personal storytelling and academic research methods (Houston, 2007); *narrative ethnographies*, which use approachable personal narratives to share knowledge about gender, race and other forms of inequality (Boylorn and Orbe, 2020); *reflexive dyadic interviews*, which focus on the joint efforts to produce meanings through the interview process itself; *reflexive ethnographies*, which show how the researcher was transformed by the research process; and *community autoethnographies*, which explore the personal experience of researchers who work together in a community (Houston, 2007).

Yet autoethnographies have their detractors. These narratives are often not considered factual, since many are dependent on memories and headnotes – the ethnographer's stored memories and interpretations – rather than extensive field notes (Minowa et al., 2012). Sparkes (2000) notes:

Although there may be good stories, these by themselves do not and cannot constitute good scholarship [...] something must be added to stories in the form of theoretical abstraction or conceptual elaboration. Such acts of boundary maintenance seem to hide a deep suspicion and fear of 'personal accounts' (24).

When critics question the credibility and reliability of an autoethnography, they are questioning the credibility of the writer themselves. Does the writer believe that this is actually what happened to them, or has the narrator taken literary license in telling their story? Does the story feel believable and possible, and is the story coherent? For many autoethnographies, there is no preoccupation with accuracy; instead, writers of autoethnographies deem it important to produce accessible texts that have a transformative impact on the reader (Holman-Jones, 2005).

Finally, in autoethnography, the connections between the personal, social and scholarly also give rise to ethical dilemmas (Wall, 2008). Relational ethics are heightened in the context of autoethnographies. Relational concerns are a crucial dimension of inquiry; it is imperative for researchers to show their findings to the people who they study and allow them to respond.

## FEMINIST THEORIES, INTERSECTIONALITY AND REFLEXIVITIES

Reflexivities are woven through feminist theories, enabling us to accept differential explanations of inequities. In feminist circles, representations of women do not merely stand in a mimetic relation to reality, but instead participate in a system of signification in which various elements draw their meaning from how they are articulated and what they are posi-

tioned in relation to (Cooper, 2015). Stevens (this volume) provides an overview of feminist theories and constructs (such as intersectionality), and explores how they inform marketing and consumer research.

Certain feminist theorists (Barad, 2003) draw on actor-network theory (see Latour, 2005) to advocate for a post-humanist feminism. Issues of reflexivity are central to this discourse, with the nature of being at the foundation of their discussions of women's agency. Post-humanist feminism looks beyond the human to include nonhuman entities (Barad, 2003). Unlike Butler and other post-structural theorists, who discuss agency in terms of lack, these theories begin with the notion of plenitude. According to this view, the world – composed of humans and nonhumans – gives rise to a 'multiplicity of forms of beings' in which 'social relations are conceptualized as dense networks of embodied practices and material forces, operating on multiple levels, from the everyday to the global' (Barad, 2003, 54). The world is therefore not a given entity to its inhabitants, but instead works with both humans and nonhumans to shape agency. In such a view, 'agency is regarded not as the exclusive property of humans but rather as an ever-changing set of potentialities immanent within the energetic and uncontrollable dynamics of material existences' (Barad, 2003, 54).

Grosz (2010) pushes back against the assumption that agency is a reaction to constraint. Instead, they suggest that agency should be conceptualized as the result of accidental interactions of material life forces that gave feminism new resources and questions. In parallel, Barad (2003) notes, 'the material world is neither external to the knowing subject nor passively there to be represented; rather it is an active participant in the realization of knowledge and reality' (55). In this view, everything in the material world is interconnected and, through ongoing 'intra-actions', produces local configurations of reality – 'agential cuts', as Barad terms it (2003, 815). She moves away from the concept of being towards becoming and argues that all things and subjects are entangled from which research cuts are made based on self-reflexivity. Barad and Grosz further argue that agency and potential for political agency are based on the extraordinary liveliness of matter and not merely on language and discourse.

However, critics of this post-humanist feminist new materialist approach note that ideas of intentionality and responsibility are important even if agency is no longer viewed from the perspective of a sovereign agent. Actor-network theory (ANT) regards agency as something that does not result from intentionality, nor something the actor thinks or does – some property of the actor – but rather, it comes from the network. An actor is, according to the concept of ANT, 'not the source of action but the moving target of a vast array of entities swarming towards it' (Latour, 2005, 46). While post-humanist perspectives enrich our understanding of interdependence between humans and nonhuman materiality, they do not provide a grasp of individual intervention. Ontology, as McNay (2015) notes, must include accounts of power as well.

## CONCLUSIONS AND FUTURE DIRECTIONS

We have depicted a mosaic of ideas on reflexivity and its multiplicity of meanings, through an analysis of various authors, disciplines and critical movements. These reflexivities are open-ended, offering various viewpoints from which individuals can understand, theorize and recognize their capacities as researchers. These multiple perspectives on reflexivity offer an orientation for researchers rather than a prescriptive recipe (Bettany and Woodruffe-Burton,

2009). If we want to nourish our collective capacity for achieving balanced, fair and nuanced approaches in our research paths, then these numerous perspectives offer us new ways to approach the research process from conception to publication. The journey to becoming a reflexive researcher is a dynamic, moving target, rather than a static end-goal or a process that can be easily mastered. The researcher humbly discovers new angles and capacities towards a more nuanced reflexivity within a continuous novel perspective.

In this path towards a more nuanced and well-developed reflexivity, we can use introspective work to deconstruct the research process and to reveal inequalities and discomforts that may arise. The continuous monitoring associated with reflexivity can result in confessional discourses, and this self-conscious position may be perceived as a solitary experience. Yet the inclusion of a collective perspective offers a way out of seclusion, through which research can be seen as teamwork with multiple researchers triangulating their reflexives (Corlett and Mavin, 2017). Even with a collective approach, though, self-positionality perspectives center the researcher, placing them in a position of authority, leaving research participants at the margins.

Such marginalization in research needs to be further problematized. One crucial point to consider, for instance, is the problem of offering others' voices through the researchers' narratives. As Stern (1998, 73) explains, researchers may become 'bossy narrators' who can misrepresent the words of participants. Even when striving to be empathetic, researchers may adopt a pretense of intimate connection and speak on behalf of another's life, motivations and struggles. Rather than positioning oneself at the authoritative center of a text, an ethical researcher may consider adopting more humble research practices. For example, inspired by Ahmed and Levinas, Bollmer (2017) proposes the idea of 'radical compassion' to see our capacity to understand and represent others from a humble position. Radical compassion:

Positions knowledge of another as that which is infinitely deferred into the future [...] but also as a form of 'knowledge' never to be obtained. In acknowledging this, however, radical compassion refuses a form of ethics that negates the experience of another in favor of my own experience (Bollmer, 2017, 63).

The quest for reflexivity requires following an endless path, one in which the researcher must assume different perspectives and debates, including, for instance, self-positional views, and alternatives such as intersectionality or selfless onto-epistemologies. A crucial point in this quest is emphasized by critical and feminist contributions that put power and inequality at the center of the debate. Fairness, inclusion and representation become important open questions that require careful attention and investigation. A critical and feminist reflexive approach asks: who gets to speak and feels welcome in our research atmospheres (Preece et al., forthcoming)? The inequalities present within our research atmospheres extend beyond the research context to include other researchers. The epistemic injustices of academia cause some to benefit from more credibility and recognition. Following Fricker's ideas (2007), we can see how this testimonial injustice is responsible for more significant inequalities, such as the marginalization of certain researchers' approaches and voices. When such researchers get limited consideration and only very few are considered credible, hermeneutical injustice is exacerbated. These interpretative resources later act to reinforce discrimination of certain voices and ideas.

It is important, therefore, to consider not only our formation of individual and collective reflexivity, but also our habits within our discipline. Who gets to write the history of our discipline? Whose work is read and cited? And whose voices get to be muted in the process? Hutton

and Cappellini (2022) investigate the epistemic injustice embedded in our ways of knowing; they offer categories of different forms of knowledge from which othering can emerge, and note that, while researchers may attempt to produce trustworthy and valorized forms of knowledge or respected theories, they may simultaneously generate inequality. Alluding to these epistemic injustices is, in our view, a task that must be practiced with radical compassion. Only by being able to practice a humbler form of knowledge production (Saville, 2020) can we create a space in our research for this always-unfinished task of recognizing the exploitation and the marginalization embedded in research.

In the academy, researchers are embedded into a system of knowledge production that requires a close examination. As demonstrated by affective theorists looking into the neoliberal processes of responsibilization (Bajde and Rojas-Gaviria, 2021), subjects are constituted as affective and entrepreneurial, and are accommodated within the structures and the downstream mediations of an affective atmosphere. In the neoliberal academy, entrepreneurial subjects are constituted in ways that favor individual competition and downplay forms of resistance, in particular, collective and gender resistance (Vayreda et al., 2019). The quest for reflexivity, far from being a solitary responsibility, must be understood in the larger context of research (Preece et al., forthcoming) in which a collective of different actors encounters one another in the affective structure of a particular academic system in which they are produced as objects and subjects of research.

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## 13. Understanding consumer behavior in the metaverse<sup>1</sup>

*Haiyang Yang and Amitava Chattopadhyay*

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### DIVING INTO THE METAVERSE

People have always been fascinated by the concept of immersive virtual reality(ies). William Gibson's 1984 sci-fi novel *Neuromancer* described 'the matrix', an immersive cyberspace. Neal Stephenson's 1992 novel *Snow Crash* introduced the term 'metaverse', a virtual reality in which avatars can interact with each other. The 1999 blockbuster film *The Matrix* (and its sequels) depicted a world in which people can be physically connected to a computer system that simulates all real-life activities. In 2003, Linden Lab launched *Second Life*, the first online 3D virtual world where people can shop for apparel and own virtual houses. By the 2010s and 2020s, waves of new technologies (e.g. extended reality, blockchain) saw the introduction of even more immersive and engaging virtual experiences (Figure 13.1), and a new generation of metaverses (e.g. Decentraland, Sandbox, Somnium Space) arrived on the market. The age of the metaverse had begun.



*Note:* Screenshot of Decentraland by the authors.

*Figure 13.1 An avatar entering a Metaverse portal in Decentraland*

But what exactly is the metaverse? Simply, it is an immersive 3D virtual or mixed reality in which people can work, learn, consume, entertain and socialize. The metaverse refers to all metaverses in totality (just like ‘the Web’ is an aggregate term referring to all websites). As with any other major technological development in human history, what the metaverse entails is evolving; that is, its very notion is changing. For instance, with the advent of blockchain technologies, digital goods transactions in the metaverse are typically empowered by blockchain systems such as Ethereum and Polygon; cryptocurrencies used in metaverse transactions are also blockchain-based. Further, the advancement of XR (extended reality) technologies, including VR (virtual reality), AR (augmented reality) and MR (mixed reality) devices (e.g. XR headsets by Apple, Meta and Microsoft), enable ever-more immersive manifestations of the metaverse, and make what is digital and what is physical increasingly integrated (Figure 13.2). As additional innovations (e.g. generative artificial intelligence, hologram projection technology) are incorporated into the metaverse, what it contains will continue to evolve. Consumption activities have always been transformed by technologies (Schmitt, 2019). Consequently, the metaverse will continue to reshape what and how people consume.



*Note:* Screenshot of Decentraland by the authors.

*Figure 13.2 Avatars in different apparels*

## CONSUMING IN THE METAVERSE

Consumers can manifest themselves in unprecedented ways in the metaverse. From facial features to body shape, consumers can easily modify most aspects of their metaverse self. They can, for example, make their avatar look similar to or far more attractive than their offline self. They can also manifest themselves as a different gender or even from a different species (e.g. an alien, robot, insect). In their avatars, people can engage in many forms of consumption in

the metaverse. They can, of course, enjoy the types of products and services they typically consume offline (e.g. purchase a pair of virtual Air Jordans, party at a metaverse club). People can also acquire digital goods such as special apparels (e.g. sneakers that enable an avatar to fly), accessories (e.g. a glowing halo that floats above one's head), or full-body 'skins' (e.g. dragon, werewolf), for which there are no offline equivalents (see Figure 13.2). These consumption experiences contribute to the construction of the metaverse self, which can be substantively different from the typical offline self (see Belk, 2013, for related discussions).

The metaverse enables consumers to have many more categories of digital possessions. They can, for instance, own virtual real estate and decorate their virtual houses with digital furniture and artworks. In most metaverses today, digital goods are represented as non-fungible tokens (NFTs) – blockchain-based digital ownership certificates. That is, transactions and ownerships of digital goods are recorded in the blockchain. For example, when a digital good is first 'minted' (i.e. acquired by a consumer) in a metaverse, information about the good (e.g. a unique ID of the good) as well as information about the owner (e.g. the owner's crypto-wallet address) are permanently recorded in the blockchain underlying the metaverse (see Yang, 2024, for discussions).

From beautiful parks to majestic skyscrapers to art museums, consumers can explore and enjoy an array of virtual experiences in the metaverse (Figure 13.3). They can also participate in a spectrum of social interactions such as going to clubs, parties and concerts or participating in metaverse-based games (e.g. the Sandbox) with others. The metaverse equivalent of real-world experiences is widely available, and the metaverse version can be far more creative, in that it is unconstrained by physical-world limitations. In addition to entertainment experiences, utilitarian services are also available through the metaverse, from business meetings to therapy experiences to training sessions, as depicted in Figure 13.2.



*Note:* Screenshot of Decentraland by the authors.

*Figure 13.3 A virtual garden in Second Life*

## MARKETING IN THE METAVERSE

As with any other technological revolutions (e.g. e-commerce websites during the Dot Com Bubble in the 1990s), businesses operating in the metaverse may experience ups and downs. Nonetheless, the metaverse is poised to become a major medium for consumption and commerce. According to McKinsey (2022), 95% of executives expect the rise of the metaverse to change how their businesses operate and market; firms have been investing over \$120 billion per year for transitioning into the metaverse, and the metaverse economy is estimated to reach \$5 trillion by 2030. Given such growth, brands are increasingly leveraging the metaverse to market products/services and engage with their customers.

Some brands have set up virtual showrooms to promote digitized versions of their products; others have built metaverse venues for consumers to learn about brand stories in an immersive environment). To illustrate with two examples: DKNY set up a virtual store in Decentraland to engage with consumers by showcasing and selling different models of virtual clothes as NFTs (Figure 13.4). P&G's luxury skincare brand, SK-II, developed an independent metaverse in which consumers can explore a virtual Tokyo district, visit different virtual venues and interactively learn about the stories of consumers who use SK-II's products (Figure 13.5). Through these metaverse-based endeavors, the brands were able to measure consumer preference for different products and brand experiences as well as engagement levels (e.g. which virtual jacket design had the highest sales, which virtual brand experience attracted the largest number of consumers). Such data can further inform in-metaverse and offline marketing activities.



*Note:* Screenshot of Decentraland by the authors.

*Figure 13.4 DKNY's Metaverse showroom*



*Note:* Screenshot of SK-II City by the authors.

*Figure 13.5 SK-II's Metaverse for showcasing brand stories*

## RESEARCHING CONSUMER BEHAVIOR IN THE METAVERSE

The metaverse engenders new forms of consumption and new opportunities for consumer research scholars. From how consumers become metaverse users, to how they make consumption decisions and experience brands, to how immersive activities impact their well-being, a wide spectrum of important research questions await exploration (for discussions, see Barrera and Shah, 2023; Chattopadhyay and Yang, 2022; Hadi et al., 2023).

By design, the metaverse is data rich. Following approved research protocols and respecting user privacy, researchers can collect observational data on a wide array of avatar behaviors, including avatar apparel items acquired, designs of and decorations in virtual homes, virtual locations visited, movements within each virtual location, bodily gestures and expressions, chat messages and forum postings. One advantage of observational data collection is that it does not disrupt consumers' natural behavior in the metaverse. Another advantage is that observational data can be captured in visual, auditory and textual formats, offering a diverse set of raw materials for distilling behavioral insights.

Researchers can also conduct surveys in the metaverse. Consumers can be recruited directly in a metaverse or through online forums associated with the metaverse. Survey questionnaires enable researchers to elicit responses on topics that are not directly or easily observable. Similarly, researchers can also interview consumers in the metaverse and conduct focus group discussions, probing such topics as the motivations for adopting avatars (in general, as well as specific manifestations), the benefits and downsides of engaging with the metaverse, and how doing so shapes their behaviors with respect to shopping, brands and consumption in general.

Given the metaverse setup, consumers can be physically located anywhere in the world and yet easily teleport to the study location. With advances in facial expression recognition

and motion sensing technologies, even nonverbal cues can be observed at a detailed level in metaverse-based interviews and focus group studies. These approaches can provide additional sources of rich data to understand the mechanisms driving consumer behavior.

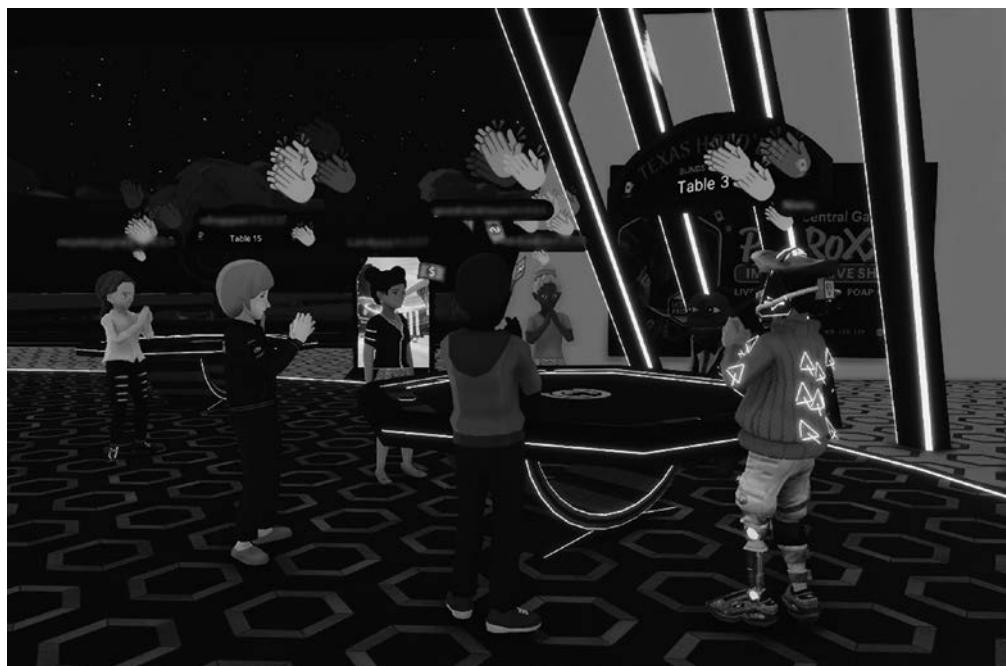
Further, researchers can easily and naturally immerse themselves in metaverse experiences, along with consumers. For instance, to investigate social interactions in the Voxels metaverse, researchers can attend social events in this metaverse, and document and analyze how individuals behave in different types of events (Figure 13.6). As another example, to understand gambling in the metaverse, researchers can teleport to a major virtual casino and observe how different consumers may engage in different betting behaviors and how they interact with each other (Figure 13.7). By actively participating in metaverse events and consumption activities, researchers can leverage a plethora of ethnographic methods (thoroughly reviewed in other chapters in this handbook), to gather consumer behavior data in the metaverse (see also Belk et al., 2022).



*Note:* Screenshot of Voxels by the authors.

*Figure 13.6 Social gathering event in voxels*

Furthermore, researchers can set up virtual venues (e.g. metaverse-based stores) or host events (e.g. social gatherings) themselves and document how consumers behave in these purposefully designed settings. Leveraging experimental methods, researchers can, for example, develop two versions of a virtual store and examine how consumers may behave differently across the two settings. Researchers can also investigate how being embodied in different avatars influence consumer behavior (e.g. Yee and Bailenson, 2007). Below, we succinctly present an



*Note:* Screenshot of Decentraland by the authors.

*Figure 13.7 Consumers congratulating the winner of a poker game*

exploratory study we conducted as an example to illustrate how experimental methods can be leveraged in the metaverse (Yang and Chattopadhyay, 2011):

This study builds on the Active-Self theory (Wheeler et al., 2007), which posits that exposure to an experience may influence an individual's behavior by altering the person's self-concept – 'the totality of the individual's thoughts and feelings having reference to himself as an object' (Rosenberg, 1979, 7). Specifically, prior research shows that self-concept is not a static and stable structure but a dynamic one (Markus and Wurf, 1987). Changes in self-concept can take place in response to events in the individual's environment (Markus and Kunda, 1986). The malleable self encompasses a wide variety of self-conceptions (e.g. hoped-for-self, not-me self, actual-self, ideal-self, etc.), and the content of the working self-concept, to a large extent, depends on what is invoked by the individual as the result of an experience, event or situation at that time (Markus and Kunda, 1986). That is, working self-concept is a temporary structure, which is contingent on situational cues and contains only a subset of selves that are salient at a given time. Thus, in the context of the metaverse, being embodied in a virtual character – an avatar – may cause people to form or activate certain aspects of working self-concept that are consistent with their avatar.

Furthermore, research on perspective-taking (Galinsky and Moskowitz, 2000) shows that when participants were asked to take the perspective of a member of a stereotyped group, they evaluated that group's attributes as more similar to their own attributes. Given that being embodied in an avatar allows people to establish a close relationship with their avatar and take the perspective of the avatar, they, to the extent that they relate to and identify with the

avatar, are likely to experience a sense of merged or interconnected identity, incorporating certain attributes of their avatar into their working self-concept. These changes in working self-concept can then affect product preferences and decision-making (Sirgy, 1982) – people are likely to prefer products that are congruent with their working self-concept, and, conversely, evaluate products incongruent with the self-concept less favorably.

To empirically explore the possible effect of avatar embodiment on consumer preference, we developed two avatars and two metaverse experiences in Second Life. The two avatars were identical in all aspects except their attire (Figure 13.8). The first avatar (referred to as Businessperson hereafter) was dressed in business attire, wearing a dark suit, white shirt, red tie, analog watch and a pair of black leather shoes. The second (referred to as Surfer hereafter) was dressed in surfer style, wearing a psychedelic, tie-dye T-shirt, seashell necklace, belt and a pair of cutoff jeans, and beach sandals. Individuals who identified as male participated in the study, and were randomly given one of the two avatars.



*Note:* Avatars developed by the authors.

Figure 13.8    Businessperson vs. surfer avatars

We also designed two metaverse experiences. Both experiences involved using the avatar to explore a large metaverse venue with many virtual rooms. But the experiences differed in the extent to which they fostered participants' identification with the assigned avatar. The high-identification version allowed participants to customize clothing items for their avatar, which was initially dressed in a neutral, white outfit. Participants were able to select several apparel items for their avatar. (A pretest showed that this avatar customization procedure can lead to a higher level of identification with the avatar.) The low-identification version of the metaverse experience did not offer an opportunity to customize the avatar. Participants in this condition were simply assigned an already dressed avatar. Participants were randomly assigned to one of the two versions of the metaverse experience.

After participants, in their avatar, reached the final virtual room of the metaverse venue, they saw a 3D virtual product – a virtual vehicle, which is more congruent with the Surfer avatar (Figure 13.9). A response window was displayed to participants, through which their evaluation of the virtual vehicle was measured. Analyses showed that, in the high-identification condition, participants embodied in the Businessperson (vs. Surfer) avatar evaluated the vehicle less favorably. However, no substantive difference in evaluation was found in the low-identification condition. In other words, avatar embodiment had a more potent effect on consumer preference when consumers identified more strongly with their avatar.



*Note:* Virtual vehicle developed by the authors.

Figure 13.9 Virtual vehicle

In addition to experiments, researcher-designed venues and events can also be transformed into actual metaverse destinations (e.g. virtual coffee shop, weekly party) for consumption and social interaction. This allows researchers to collect highly granular behavioral data over extended periods of time. But because these proactive approaches may risk altering the indigenous metaverse culture, carefully crafted research protocols are needed to help minimize any potential downside. Furthermore, as in all behavioral studies, researchers need to be mindful of institutional review board (IRB)-related policies and regulations. For instance, it is important to be able to inform potential participants of the research so that they may consent to participate in the metaverse experience or opt not to join. Such information can be automatically displayed to all individuals when they are about to enter a metaverse-based research venue. Furthermore, researchers need to carefully consider how the behavioral data obtained can be deidentified (e.g. use a computer program to automatically replace user IDs and anonymize the data) and how the data can be securely stored.

Once the data are collected using approaches such as those highlighted above, researchers can consider utilizing computational tools to help code the data. For textual data, natural language processing programs such as NLTK and CoreNLP can be used to, for example, classify texts, stem words, generate tags, score sentiment and emotions, as well as identify name entities, time points and locations. For visual data, software packages such as OpenCV can help perform, for instance, facial recognition, object identification, and track and code physical movements. These computational tools can facilitate coding behavioral data on a much larger scale, in more granular detail and at a higher speed. When used in combination with traditional qualitative analysis software (e.g. ATLAS.ti, NVivo), these tools can enable researchers to perform deeper qualitative analyses and develop richer theoretical insights.

Researchers can also complement the data sources discussed above by diving into the blockchain underlying each metaverse. For most metaverses today, transactions, ownership records and product information are stored in blockchain systems. Such data offer ample research opportunities. For example, a recent study (Yang, 2024) analyzed large-scale blockchain data on purchases of digital goods in the metaverse across a wide spectrum of product categories (e.g. upper wear, lower wear, footwear, skin). This research found that consumers were willing to pay a substantially higher price for a brand new (vs. used) digital version of a digital good, even though both versions were identical in every pixel and in every functionality.

It is important to note that consumer researchers can access blockchain data by using readily available tools such as Ethplorer, Etherscan and Polygonscan. These tools enable researchers to explore and retrieve blockchain data for analyses. The results of the empirical analyses can provide further support to the consumer behavior insights they discovered using the aforementioned approaches.

## CONCLUSION

As the technologies underlying the metaverse continue to advance, the consumption of virtual, immersive products, experiences and services will expand and become ever more economically significant. Brands across industries have been entering into the metaverse to engage with avatars of consumers and market their offerings. Yet, the extant understanding of consumer behavior in the metaverse is limited. There are ample opportunities for researchers to dive into these immersive digitized worlds, experiment with new methods to collect, code and analyze data, and distill new consumer behavior insights.

## NOTE

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## 14. Working with relational (material-semiotic) theories

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### INTRODUCTION

Consumer research has shown that even the most mundane consumption settings, such as a consumer shopping in a store, exhibit a covert complexity of relations between humans and materials (Cochoy, 2008; Doucé et al., 2013). Digital hyperconnectivity increases this complexity by incessantly intertwining the physical and the virtual. For example, consumers can use their mobile phones to check product reviews or compare prices during their visits to stores (Fuentes and Svinstedt, 2017), thus contributing to the merging of physical and virtual retailscapes (Fuentes et al., 2017). Consumer researchers have explored increasingly technologized and spatially distributed social phenomena (Wahlberg, 2022) by turning toward relational perspectives that turn attention to the relations between heterogeneous material and semiotic elements, from which actions and capacities emerge (Canniford and Bajde, 2016).

This chapter reflects on the unique methodological opportunities and challenges of working with actor-network theory (Bajde, 2013; Latour, 2005; Law, 2008) and assemblage theory (DeLanda, 2006; Parmentier and Fischer, 2015), hereafter jointly referred to as the relational approach. We argue that this approach blurs the line between theory and method, as it offers not only conceptual tools, but just as importantly, advances a set of methodological sensibilities that can transform the conduct of empirical research. Hence, we open this chapter by outlining four interrelating sets of relational sensibilities (i.e. heterogeneity, hybridity, emergence and interconnectedness). Next, we review and reflect on the methodological steps taken by consumer scholars and those in neighboring fields to capitalize on these sensibilities. We also devote attention to how relational researchers can adjust conventional methods, and how they can creatively combine them to shed light on material-semiotic processes and relations.

### RELATIONAL SENSIBILITIES

In this section, we argue that relational theories such as actor-network theory and assemblage theory promote a set of methodological sensibilities that can profoundly shape the ways consumption scholars approach research design, data collection and empirical analysis. We outline four interrelated sets of relational sensibilities and illustrate each with examples from Canniford and Shankar's (2013) deployment of actor-network theory and assemblage theory to explore how consumers assemble romantic experiences of nature.

## Heterogeneity

The first set of sensibilities relates to researcher's attentiveness to the multiplicity and heterogeneity of actors or components involved in social phenomena. Relational theorizing seeks to suspend *a priori* assumptions regarding presence, agency and power with an eye to openly exploring the potential contributions of diverse human and nonhuman actors, and the heterogeneous makeup (e.g. material and discursive) of the networks and assemblages involved in shaping consumption phenomena. For example, rather than focusing solely on how consumers experience nature, Canniford and Shankar (2013) study how experiences of nature emerge from assemblages of heterogeneous resources such as material geographies, technological resources and discursive resources. Attentiveness to heterogeneity turns taken-for-granted assumptions of who/what matters, as well as who/what matters more (i.e. presumed hierarchies), into open questions to be explored in concrete empirical settings.

## Hybridity

Attentiveness to heterogeneity leads us to sensibilities for the hybridity of seemingly pure phenomena and the problematization of purity – presumed homogeneity of essences (e.g. pure nature), processes (e.g. purely economic, purely social) or action (e.g. purely human action). Relational theorizing turns attention to the processes of purification and the study of how purity is constructed and maintained – for instance, how nature is purified through consumption activities such as surfing (Canniford and Shankar, 2013). Sensibility to hybridity can help researchers question the self-imposed restrictions of scholarly fields and theoretical frameworks. For example, Latour (1993, 3) problematizes purified notions of 'the social' (e.g. pertaining to human relations and collectivities) in sociology, and calls for more open exploration of the often heterogeneous and hybrid associations, while Çalışkan and Callon (2009; 2010, 2) question 'the economic' to open avenues for studying economization.

## Emergence

The proposed attentiveness to heterogeneity and hybridity coincides and overlaps with the third set of relational sensibilities – that pertaining to the emergent, dynamic and uncertain nature of reality. Relational scholars tend to approach phenomena, networks and assemblages as perpetually evolving. That is not to deny the existence or influence of persistence, order and stability, but rather to acknowledge the efforts and risks involved in bringing persistence, order and stability about and maintaining them. For example, Canniford and Shankar (2013) argue that assemblages of nature are marked by fragility and contestation. Service structures, technological resources and the social interactions required to assemble nature inevitably betray the ideals of external/pure nature, thus requiring the ongoing work of purification (i.e. masking or purging problematic elements of assemblages).

## Interconnectedness

The final set of sensibilities relates to an ongoing commitment to exploring 'togetherness in action' (Bajde, 2018, 192); i.e. how heterogeneous/hybrid actors and elements interconnect and jointly contribute to the emergence of consumption phenomena. Put differently, relational

approaches tend to advocate a more holistic view, inviting researchers to shift from the study of individual actors/components to the study of heterogeneous, hybrid assemblages and networks. While the way interconnectedness is approached might differ across relational theories, the insistence on exploring the emerging intertwinements of relations is shared. For example, in contrast to AT, ANT is less keen on analytical jumps from one network/assemblage to another, or across different levels of nested assemblages.

## RELATIONAL RESEARCH DESIGN

The sensibilities outlined above offer opportunities for understanding the relational constitution of the social world, but they also raise several methodological challenges. For example, adopting these sensibilities requires moving beyond the convenient approaches that focus on a narrow set of actors (e.g. consumers), data (e.g. verbal and/or textual) or research sites. Such narrow-focus approaches are difficult to reconcile with the sensibilities of relational theorizing, because the researchers adopting them risk imposing boundaries on the phenomenon under study that are based solely on methodological conventions. In contrast, a relational approach encourages researchers to design their study more flexibly, in order to trace how the phenomenon takes shape through the spatially-dispersed relations and/or actions of various kinds of constituents (e.g. components of assemblages, actors). Narrow-focus approaches are, in other words, problematic because they struggle to capture the distribution of social phenomena across different types of actors (e.g. humans and nonhumans), textures (e.g. discursive and material) and sites.

Below, we draw on several exemplary studies that illustrate how to formulate a research strategy for exploring the distributed nature of social phenomena. Existing CCT research often deploys relational approaches as an enabling lens (Dolbec et al., 2021) that is adopted after the data have already been collected. In these cases, the transformative potentialities of relational approaches impact the process of data analysis, rather than the overall research design and methodological work as a whole. However, with the growing popularity and maturation of relational perspectives, scholars are increasingly deploying relational ideas in ways that profoundly transform the flow and the dimensioning of their empirical research.

One approach to studying the distributedness of social phenomena is to attend to how they are constituted on different levels, layers or scales of social reality. Preece et al. (2019) adopt this approach when exploring the longevity of the James Bond brand. They adopt a ‘DeLandian assemblage approach’ (335) that is rooted in the assumption that social reality is made of assemblages at different levels, nested within each other. Treating the James Bond brand as a multi-scaled assemblage, Preece et al. collect and analyze data across the micro-level of the James Bond formula (e.g. the narrative essence of the Bond brand) to the meso-level of the movie industry and the stewards that promote the brand, and also on the macro-level; that is, the sociocultural contexts in which the brand is situated.

The multi-scaled approach above is just one means of exploring the distributedness of social phenomena. Indeed, scholars more inspired by actor-network theory than assemblage theory emphasize that social reality cannot be divided into neatly arranged levels. Kjellberg and Helgesson (2006), for example, stress that perceived differences in scale should not be used as analytical categories but rather are something to be explained empirically. They ponder: why do we perceive some elements as micro and others as macro? For them, all that exists is local-

ized action. There is no scalar difference between, say, a person reading a book or a politician attending a summit. From this perspective, and to leverage a trope from ANT, the task scholars face is to ‘follow the actors’ (Latour, 2005, 12) and their actions, wherever this process may lead the researchers.

Both approaches – tracing the multi-scalarity of assemblages and following the actors – represent ways to grapple with the distribution of social phenomena. Where the DeLandian assemblage approach encourages researchers to explore the vertical distribution of phenomena, more ANT-inspired approaches typically aim to study horizontal distributedness. That is, instead of looking into how elements assemble at different vertically organized levels, ANT-oriented studies seek to study how the actions in one location (e.g. a locale of a particular assemblage) connect with an assemblage actualization in another location.

Zigon (2015) provides an example of how to capture the horizontal distributedness of social phenomena. He proposes adopting a methodological approach he calls *assemblic ethnography*, which is designed to enable the researcher represent phenomena with both ‘horizontal [...] just as much as vertical thickness’ (516). This outcome is achieved by going against the grain of traditional ethnography and its insistence on focusing on singular sites of study. Zigon avers that this traditional approach ‘decomplicates’ (515) the assemblage under study, cutting it off from the relations that constitute it. Instead, he argues that the assemblic ethnographer must attend to the ‘widely diffused complexity’ (516) of the assemblage under study, chasing it ‘through its continual process of assembling across different global scales and its temporally differential localization in diverse places’ (515). In effect, this means researchers must remain flexible in their choice of research site, and shift sites when they feel what is being observed in the initial site can only be explained by something going on elsewhere.

Tracing assemblic relations across research sites can be challenging for at least two reasons. First, the assemblic ethnographer does not know in advance where the research will lead, nor when it will do so (Zigon, 2015). Second, the researcher’s aim is not to simply move from one site to the next (as might be the case with multi-sited ethnography), but rather to identify and trail diverse assemblic relations. For example, when Zigon traced the various assemblic relations that constitute the war on drugs, he did not simply change research sites to explain the various local manifestations of disciplining drug use, but rather aimed to explore how the phenomena observed at each site was connected and held together by their mutual relations:

For example, when the aspects of carceral political economics and state-based surveillance revealed themselves in New York, I traced those assemblic relations and their differential distribution to Denpasar [Indonesia] and back again to Russia; or when the aspect of biopolitical therapeutics revealed itself, I traced it from Russia to New York to Vancouver to Copenhagen. The research unfolded, then, along assemblic relations as they become differentially distributed, and not at sites. (516)

Nicolini (2009) advocates a similar approach, suggesting the distributed or ‘translocal’ nature of social practices call for a ‘methodological approach that makes us see the connection between the here-and-now of the situated practising and the elsewhere-and-then of other practices’ (1392). Nicolini suggests such an approach could be achieved through zooming in and out of relationally constituted entities, such as practices or assemblages. This metaphor refers less to simple magnification (i.e. making something small appear bigger) and more to ‘the switching of theoretical lenses to allow for new aspects of the phenomenon to come to the fore’ (Nicolini, 2009, 1404). Zooming in and out of relational entities – that is, approaching them

via different theoretical lenses – helps us better understand how they are locally accomplished (or localized), as well as how different localizations of the entities are connected.

Importantly, a commitment to shifting theoretical lenses also entails a commitment to collecting a rich dataset that can be usefully explored through multiple lenses. For example, ethnomethodological analysis, one of the lenses Nicolini (2009) suggests, can only be fruitfully achieved if one has collected rich data that document people's conversations and interactions. Thus, a design centering around zooming in and out of relational entities carries both methodological and theoretical implications, and must be adopted prior to data collection and not at the stage of analysis.

## A FRAMEWORK FOR DESIGNING RELATIONAL RESEARCH

Based on the examples above and other exemplars of relational theorizing, we offer a framework for organizing the process of studying the elusive distributedness of social phenomena (see Figure 14.1). This framework is designed not only to function as a *post hoc* supplement or (re)analyzing already collected qualitative data, but also as an end-to-end guideline and tool for establishing and organizing the entire research process from data collection to theorizing. Our framework is particularly inspired by Feely's (2020) outline of 'assemblage analysis', which we have refined to accommodate our broader interest not only in Delanda's (2006) assemblage theory but also in relational research based on ANT.

### **Scoping for Constituents**

In the first phase of the framework, the research begins by scoping for constituents. By constituents, we mean any entity or component that helps give shape or substance to the phenomena under study. During this phase, researchers should remain as open as possible with regard to what types of constituents might contribute to understanding and employ exploratory methods that can detect the constituents of various kinds – whether human, nonhuman, discursive or material. The aim of this phase is not just to sensitize the researcher to the distribution of the phenomenon under study across potentially diverse constituents; rather, it is also to render the study manageable by identifying a limited set of constituents to focus on. In other words, in this phase we must distribute our attention to more (types of) actors or components than is typical of most CCT research approaches, while still also locating and deciding upon a center (or a few centers) of attention.

### **Trailing Connections**

In this next phase, researchers should focus on the connections between the constituents identified in the first phase, and attend to the question of how such connections matter to the phenomenon under study. Feely (2020) refers to this stage as the mapping of affective flows between the components that constitute the assemblage being studied. During this phase, it is important that researchers extend their research design beyond methods that merely detect the most important constituents, and also methodologically work out ways to study how these constituents come into contact with each other, and interact. Here, Nicolini's (2009) idea of a zooming-in-and-out approach and Zigon's (2015) assemblic ethnography described above can be fruitful.

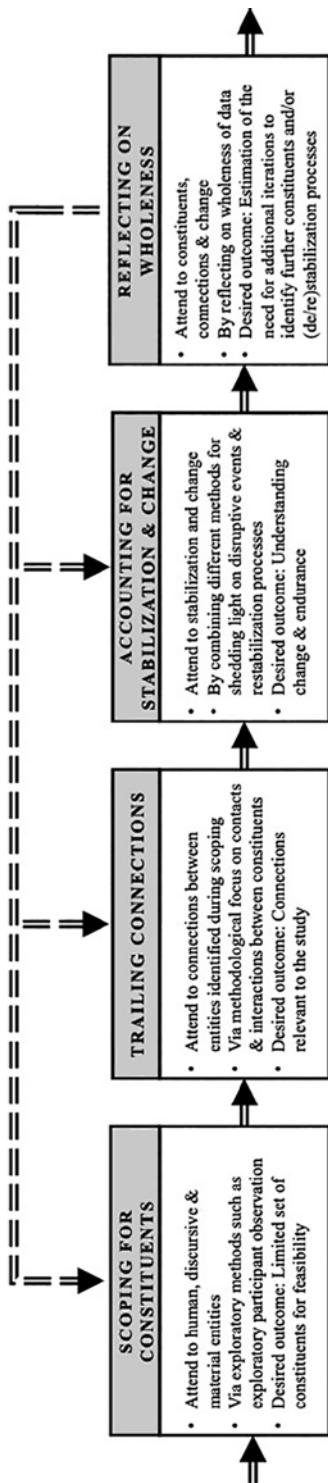


Figure 14.1 Framework for relational research design

### **Accounting for Stabilization and Change**

These processes comprise the third phase of our framework for relational theorizing. Here, researchers will explore how the connections between constituents stabilize or destabilize the phenomenon under study. In assemblage theory, for example, we are here concerned with how different flows between assemblage components stratify the assemblage (Schneider-Kamp and Askegaard, 2022), that is, how they connect the components within the assemblage on different levels. This step thus goes beyond the more descriptive aims of the two previous steps, as the goal here is to understand why some social phenomena endure but also how they change and cease to exist (Weijo et al., 2018).

### **Reflecting on Wholeness**

When undertaking this last phase, researchers should also critically reflect on whether the stabilization and destabilization can be satisfactorily explained by the constituents and their connections that have been previously identified by the researchers. For example, are there moments of disruption that still puzzle the researchers? Such realizations may give rise to additional iterations of the earlier stage of the process (e.g. scoping for constituents, trailing connections), and perhaps even spur the adoption of new modes of data collection or analysis if needed to capture the missing constituents. The ultimate goals are that the analysis will reach the point where it captures the constituents and interactions that can account for the stabilizing and destabilizing tendencies of the phenomenon.

## **METHODOLOGICAL TOOLS AND TECHNIQUES FOR RELATIONAL RESEARCH**

In addition to considering the overarching issues of research design that we address above, we now address the problem of finding and effectively deploying specific methods and techniques of data collection and data analysis. Our primary aims are to point to several inspiring solutions adopted in existing research (e.g. Cochoy, 2008) that can help scholars to repurpose existing methodological tools and innovatively (re)combine them.

What is rather striking when evaluating the current consumer research that leverages relational theories is that the methods these studies use do not diverge substantially from those pervading many other approaches in interpretive consumer research. For example, researchers who produce assemblage and ANT studies typically deploy in-depth interviews, observation and document analysis. However, when we observe how such data is analyzed, we begin to see what might be methodologically particular about relational research; namely, many of these studies creatively combine diverse kinds of data to shed light on the relations between various constituents, and the local accomplishments of assemblages.

### Creatively Combining Methods

Such diverse combinations of data are evident in Nøjgaard (2023), who studies the assemblage of comparative product tests conducted by consumer organizations. He first uses archival data to map out the complexities of a singular actualization of the assemblage (i.e. the conducting of the tests in test laboratories) and then turns to a wider selection of data, including oral history interviews, semi-structured interviews and press releases, to study the relations between lab testing and other actualizations of the product testing assemblage. More concretely, Nøjgaard combines these types of data to show how consumer organizations make the lab test results connect with and transform both consumer choice situations, and the marketing practices of product design and promotion.

Another prime example of innovative method choice and data combination is Cochoy's (2008) study of shopping carts. The research design includes participant observation, focus groups, transcripts of consumer-to-consumer conversations within supermarkets, as well as 'observiaires' (19) – a way of analyzing and quantifying observations through a questionnaire-like code grid that seeks to interrogate the role of various objects in grocery shopping without analytically relying on the explanations of the people who use them. What is instructive about Cochoy's study is not just the creative combination of diverse methods and types of data, but also how they complement each other. The author notes the varied types of data are not supposed to facilitate triangulation per se, but rather 'to obtain the best figures each tool is able to provide. These figures are then combined to produce an overall picture, thanks to their complementary character' (19). Put differently, the multiple methods and types of data jointly enable the research to grapple with (and eventually piece together) the complex and elusive nature of material-semiotic assemblages and actor-networks.

While combining different types of data seems to be a fruitful methodological technique for relational theorizing, it is also worth stressing that studies using a singular type of data can also yield relational insights. Feely (2020), for example, mainly uses in-depth narrative interviews to conduct his assemblage analysis. However, he adopts a distinctively relational-analytical stance towards the interviews. Instead of solely attempting to detect the discourses that underlie them, Feely explored the interviews for the various forces that shape the interviewee's experience of and being in the world. Although only analyzing a singular type of data, Feely was able to capture the flows and connections of entities as diverse as physical architectures, affects, technologies and discourses. This example shows that combining different types of data is not a prerequisite to relational theorizing if we adjust and attune our analytical techniques to capture the forces of diverse constituents.

### Repurposing and (Re)Inventing

We use the example of ethnography to illustrate the broad spectrum of options that relational researchers have in retaining how they use, adjust or reinvent existing methods. Ethnographic methods resonate well with the abovementioned advantages of a more holistic and combinatorial approach to empirical research. On one end of the spectrum, researchers might decide to deploy conventional ethnographic approaches to study assemblages or actor-networks. Here, ethnography is repurposed to collect data as input for relational analysis (Schneider-Kamp and Askegaard, 2022). On the other end of the spectrum, researchers might seek to more radically

reinvent ethnography by inscribing relational theorizing and relational sensitivities into the very core of the ethnographic process.

An example of such reinvention can be found in Wahlberg's (2022) *assemblage ethnography*. While conventional ethnography emphasizes the importance of participant observation and a (human) insider perspective (Labaree, 2002), assemblage theory invites researchers to observe the capacities of heterogeneous, interconnected constituents, and to observe the emergent flows of discursive and material substances across temporarily stabilized assemblages and networks. Acknowledging that meaningful participation, engagement and proximity are challenging to achieve as sociocultural contexts become increasingly dispersed and technologized (Humayun and Belk, 2020; Schneider-Kamp and Kristensen, 2019; Wahlberg, 2022), there is great potential in creatively employing or reinventing ethnographic methods.

For instance, consumer researchers might conduct participant observation by attaching themselves to an assemblage as a component, forming relations to other components, and experimenting with the material and discursive flows of the assemblage. While consumer researchers are well-versed in human-centered methods that typically revolve around and there is considerable opportunity for complementing these methods with innovative techniques that can capture the relational makeup and capacities of material objects and infrastructures (Franco et al., 2022).

Finally, honoring the time-tested advice that not the intensity of the participation but the quality and utility of the collected data for the aim of the study is paramount, researchers should diligently ensure not to impose their personal desires for how the assemblage should function and evolve on the research project or the participants. Just as importantly, the researchers should reflect on how to best step into and out of the assemblage to allow for critical reflection and minimize the possible derangement of flows, and avoid getting overly absorbed.

## CONCLUSION

In this chapter, we have sought to outline a set of sensibilities afforded by relational theorizing, how these sensibilities can be translated into empirical research design, and how researchers can benefit from past efforts to creatively adjust and/or combine conventional research methods. We hope these tentative steps can be helpful for researchers interested in applying relational theories and can spark additional reflection on the methodological facets of relational theorizing.

After reviewing consumer research papers using actor-network theory or DeLand's (2006) assemblage theory, we were surprised by the lack of attention given to the challenges of research design and method use in existing relational research. The road ahead is filled with opportunities to move beyond using relational approaches merely as a *post hoc* lens for data interpretation and theory development, and instead deploy relational sensibilities from the very start of the research project. This way, the empirical research can be designed to fully capitalize on relational sensibilities and ensure that the data is collected in ways that are better suited to the particularities of relational analysis. Our hope is that, with these envisioned developments, more attention will also be devoted to developing innovative methodological approaches and techniques, and to openly debating the advantages, challenges and limitations of relational methodology.

Finally, we wish to stress we have coupled actor-network theory and DeLanda's (2006) assemblage theory under a unified rubric of (material-semiotic) relational theorizing for didactic reasons. While these two streams of theorizing do share several sensibilities and can be approached in similar ways, there also exist several important differences (some of which we briefly indicate above) that future research should explore more fully.

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## 15. The warp, weft and wherefore of qualitative feminist research in marketing

*Lorna Stevens*

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### INTRODUCTION

Before writing this chapter, I took a look at the previous edition of this *Handbook* to see if (and how) feminist research methods were mentioned. The first mention is Linda Scott's chapter on qualitative research in advertising (2006). Referring to her work on women, feminism and the modern market, Scott argues that too often the critical majority write about an imagined past, which the oppressed inhabited, without providing much in the way of evidence. She critiques grandiose claims from the critical elite to speak for others, pointing to the paternalistic tone of much of this work.

Scott argues that advertising research also suffers from this bias – that only expert intellectuals can give voice to or understand the issues and perspectives of oppressed ‘others’. Scott advocates reader-response theory as one way to reverse this critical bias. It is based on the premise that readers are actively involved in creating meanings in text, and whatever the intentions of its creators, readers may choose to resist or read against the grain (Flynn and Schweickart, 1986). Furthermore, individual readings of texts and the meanings taken from them are valued as much as the text or the author of that text. This emphasis keeps the focus on the real lives of humans and stops us from presuming too much in our interpretations.

Several important threads from Scott's observations will be visible in this chapter, such as the need to focus on the lived experiences of those we research rather than how we imagine their experiences to be; to approach our research in a cautious, humble and self-reflexive manner; to give those we research a voice in our work rather than presuming to speak for them; and finally, to be wary of interpreting participants' experiences through whatever baggage we are carrying, or whatever theoretical lens currently enamours us. And of course, as feminist researchers, we should be mindful of the underlying power structures that determine how knowledge is created and validated and by whom, and the intentions and intended audience of that knowledge.

The other reference to feminist research methods occurs in Annamma Joy et al.'s chapter on reflexivity in consumer research (2006). Self-reflexivity is a key tenet of feminist research, so it is hardly surprising that the authors include a section on feminist critical reflexivities and practice. Many of the themes they cover resonate with me: feminist standpoint theory, the implication of postmodernism on feminist research, the decentred subject, situated knowledge, the challenges of intersectionality and multiplicities of genders, and the critical essence of feminist research, that it has a political, activist agenda to bring about praxis (change). They conclude by noting that responsibility, accountability, acknowledgement and negotiation of difference are all challenges for the truly reflexive feminist researcher.

Having pulled out these threads, I offer my chapter on feminist qualitative research. I do so with some trepidation, as the domain is an increasingly multifaceted, multi-layered, rich tapes-

try, with complex inter-weavings and, in fact, entirely new patterns that make doing justice to the glorious fabric of contemporary feminist, qualitative research a dazzling, even somewhat daunting, prospect.

## THE CURRENT FEMINIST LANDSCAPE

I begin by asserting that there has been much activity in the arena of feminist research since the first volume of this *Handbook* appeared in 2006. We now talk about feminisms rather than feminism, and this shift underlies the multiplicity of research approaches. We acknowledge multiple, fluid gender identities, where once feminist research was primarily about women and girls. We now tend to emphasise genders rather than sex, whilst acknowledging multiple variabilities, tensions and debates in relation to sexuality (the biological) and gender (the cultural; see Karmakar and Sarkar, 2021) in conversation with Grosz, for an excellent discussion of these distinctions). This diversity has led to more considerations of intersexual and transgender identities in our research foci. We acknowledge that, for too long, feminism has been dominated by white, Western perspectives. Contemporary feminist research reflects the greater diversity of gendered and feminist positions, and accommodates the diverse geopolitical, cultural landscape.

We are also in the midst of a resurgence of interest in feminisms and feminist research – its fourth wave, so named by Cochrane (2013), who identified this new groundswell. The fourth wave is characterised by a reinvigorated feminist activism reminiscent of feminism's second wave and emphasising connection and community (Maclaran, 2015). This activism is visible both online and in the streets. Amongst other, more insidious implications, the digital age has demonstrated the positive power of the internet to highlight women's issues throughout the world and to enable collectives of feminist voices to come together as communities advocating real, political, institutional and structural change.

Intersectionality, a term Crenshaw coined in 1991, is now centre stage in feminist research. The term captures the fact that the study of women's lived experiences is interlinked with other contributors to oppression and marginalisation (e.g. race, class, age, sexual orientation, ableism, geography). In acknowledging these intersections, it is no longer appropriate for feminist researchers to adopt a one-voice approach or assume a common language (Haraway, 1990). As feminist researchers, we must navigate a more complex terrain and be mindful of our own positionality, situatedness and privilege; of the complex, multiple threads of oppression that bind us in varying degrees of severity; and of how these intersections complicate but create greater nuance and more tailored insights, with fewer absolutes and more situated oppressions to be explored.

## THE FABRIC OF QUALITATIVE FEMINIST RESEARCH

Whilst it is increasingly difficult (and inadvisable) to speak in absolutes, nevertheless a number of fundamental principles are key in qualitative research from a feminist perspective. This approach is the favoured methodology for many feminist researchers in marketing and consumer research, as it focuses on subjective experiences and meaning-making processes (Reinharz, 1984). Consequently, it aligns well with feminist perspectives, as it enables

researchers to get up close and personal with participants and do justice to the richness and complexity of their individual experiences. This close approach to our research subjects facilitates a deeper understanding of how we are all impacted by marketplace phenomena and enables us to understand the social forces that shape and affect us. I elaborate on three related issues below.

First, feminist research by its very nature challenges the status quo and addresses systemic, social and structural inequalities in society. Feminist praxis connects theory with practice, personal experience with social structures, and ultimately, offers transformation and emancipation as its intended outcomes (Hum, 2022; Stanley, 2013). In short, feminist theory is fundamentally activist in its intentions. It should unsettle, challenge and subvert existing norms with the intention of bringing about change.

Second, feminist research is also about power-sharing, non-exploitation and seeking to break down the divide between 'us and them' in research. Self-reflexivity is central to the feminist researcher role, and this position applies to its ontology, knowledge creation (epistemology) and methodology. The feminist researcher considers and deconstructs issues of power and control, and their own positionality, privilege and situatedness in the research encounter and process (Nencel, 2014). Being attentive to voice requires that we not only give each participant a voice in our research, but also requires us to consider whether we have the right to speak (or interpret) for others and alerts us to the inherent dangers of doing so. Indeed, this issue represents an 'ethical quagmire' for feminist researchers (Leavy and Harris, 2019, 104). Inadvertently being seen as a coloniser of our participants' stories and experiences is the very antithesis of feminist research, after all, and one that strikes those who identify as feminist researchers with horror. Decolonising feminist knowledge creation is now a central concern for many feminist researchers (see Ourahmoune and El Jundi, 2022).

Third, as is abundantly clear from the above, ethics is a fundamental tenet of feminist research, yet one that is equally challenging. Feminist research is by its very nature engaged and value laden; in short, it is *involved*. Early work on ethics reflects binary thinking and privileges a masculine over a feminine system of ethics. Feminist psychologist Carol Gilligan (1979) did much to challenge this. Her work disbanded dualistic thinking around ethics, where one system is privileged over the other, and contributed to a positioning of feminist ethics as nuanced, relational and concerned with issues of responsibility and an ethics of care.

To summarise, the above considerations compel those of us who undertake feminist research to consider how we do so, with whom and why. Our research should emanate from a position of mutual respect, parity (equality) and inclusivity in terms of both the research process and how we disseminate our findings. If adhering to all of the above sounds like a tall order, it is heartening to note that the challenge of conducting feminist qualitative research in a shifting and increasingly complex contemporary landscape is not deterring contemporary feminist scholars from embarking on projects that meet these criteria, with much outstanding, critical and varied work as a result.

Indeed, the proliferation of books and special issues on feminist perspectives and gender issues in marketing and consumer research in recent years (e.g. *The Routledge Companion to Marketing and Feminism* (2022)), is testament to a burgeoning of interest in all things feminist and feminism related. Furthermore, there have been a succession of special issues over the past few years: *Journal of Macromarketing* (2020), *Journal of the Association for Consumer Research* (2021), and the *Journal of Marketing Management* (two issues in 2021). These special issues highlight the range of topics and feminist methodologies being adopted in

this arena. A number of recent articles also specifically address theoretical aspects of feminist research in marketing (see for example, Maclaran and Stevens, 2019).

Contemporary feminist qualitative research is produced in an intellectual and cultural environment that has seen many new patterns of gendered expression emerge, with profound impact on the field. Feminism is a complex web with enmeshed waves clashing, competing and combining in a multiplicity of ontological, epistemological and methodological configurations. I discuss the main ones that impacted how we conduct qualitative feminist research below.

Intersectionality, the awareness of multiple, intersecting factors that shape experience has led to a strong emphasis on interdisciplinary, multi-layered, decolonising perspectives in feminist research (Leavy and Harris, 2019). The perspective recognises gender as just one form of oppression and marginalisation among many; accordingly, feminist research needs to become less white centred and Western dominated. Intersectionality opens up spaces for enquiries into multiple arenas of oppression in multiple contexts, with different perspectives and alternative positionalities to be addressed.

Another challenge to how we think about and do research originates from the post-qualitative turn in feminist qualitative research, which rejects its ‘institutionalization, standardization, and scientification’ (St Pierre and Pillow, 2000, in Gerrard et al., 2017, 385). In particular, the presumed authority of (neoliberal) feminist researchers over their research subjects is rebuffed (Gerrard et al., 2017). A post-qualitative approach offers us fresh challenges for being feminist researchers working within institutions and structures often at odds with our feminist agendas and commitment to our research participants, as well as issues related to parity, inclusivity and praxis.

There is also a challenge to discursive, linguistic approaches in feminist research, marked by the rise of the new materialist feminism tradition, which is aligned with posthumanist and post-anthropocentric thinking (Braidotti, 2013). New materialism broadly perceives humans as relational, co-existing with, and of no more significance than, other matter or entities, be they natural, social, cultural, political or psychological. Humans are drawn into assemblages with other entities that create flows of affect or becomings (Barad, 1996; Braidotti, 2013; Deleuze and Guattari, 1988; Grosz, 2011). The researcher engages with all matter, and knowledge is plural, complex, contextual, eventful and unpredictable (Fox and Alldred, 2020).

Closely related to new materialist feminism is ecofeminist research, which has intensified to keep pace with the accelerating environmental crisis (Haraway, 1987). Both social and cultural ecofeminism critique the hierarchical mappings embedded in culture (Twine, 2001), deconstructing the ideological, androcentric and anthropomorphic assumptions in the symbolic order (Plumwood, 1994). Current research continues to deconstruct the social and cultural discourses that reinforce binary thinking and the privileges within that prevailing and persistent system. Ecofeminist perspectives overlap with new materialist, posthumanist and intersectional feminist issues, all of which extend beyond a humanist approach to one that acknowledges the lives and affects of all matter and their interlocking relationality.

Finally, the digital age and its technologies has heightened poststructuralist, postmodern, postfeminist and posthumanist debates and research possibilities. Bound within the digital space are issues of power, identity, representation, justice and injustice, power and powerlessness, freedom and coercion, and morality and ethics – all pressing feminist issues, as I have discussed. The digital space creates new opportunities as well as perils and pitfalls for doing feminist research, with new sites and platforms for collecting and disseminating research find-

ings (e.g. work by Leavy and Harris, 2019; Senft, 2008). Many feminist marketing scholars currently work in the online space, as I will discuss later in this chapter.

In the next section, I explicate the key topics that inspire contemporary feminist scholars, and the epistemological and qualitative methodologies they use to explore the complex fabric of women's experiences, and gender issues more broadly, in the marketplace. The headings I provide are simply for structural purposes, as the topics overlap and interweave with one another.

## WOMEN'S REPRESENTATION

The body of qualitative feminist research on women's representation is rich, largely thanks to the work of scholars such as Elizabeth Hirschman, Barbara Stern, Linda Scott, Eileen Fischer and Julia Bristol from the late 1980s onwards. Their pioneering work applies feminist literary theory to deconstruct texts and discourse, reveal underlying ideologies, as well as analysing audience's reception of such texts. Representations reflect real experiences and also serve as signifying practices that both construct and reflect ideological thinking, heteronormative values, relationships and dominant discourses circulating in the world. Much of this research focuses on how women are entrapped within dominant and privileged representational forms. Part of the work of feminist researchers is to challenge the status quo, by exposing these representations and their underpinning assumptions and considering alternative representations that better reflect women's experiences and aspirations. These outcomes serve to counterbalance prevailing and persistent patriarchal biases.

Qualitative feminist research on representation often focuses on analyses of texts – unpacking underlying assumptions embedded in cultural narratives and discourses, including those circulating within our own discipline, to expose their patriarchal cores. Analysing discourses in TV, film, photography, advertising and so forth can reveal coded prejudices, presumptions and rooted misogyny.

Another important theme within representation research focuses on participants' experiences in the marketplace and how they are represented, as well as how they represent themselves. Feminist research has always challenged the ways women are represented, and increasingly women are empowered, particularly in the digital space, to create their own representations that subvert dominant representations in the marketplace. Analysing gendered texts addresses the evolving conflicts, confluences and contestations of gender representation and indeed feminism itself within them (Gill, 2008).

Scholars leverage a wide range of qualitative methodologies in this arena, including reader response theory, ethnography and netnography, in-depth interviews, group discussions, content analysis, visual analysis, videography and so on. An audience-centred or reader-response research approach can explore how consumers perceive and experience texts, and their effects. By attending to the non-judgemental principle of feminist research, researchers can explore the lived experiences of women in relation to their representations.

Recent feminist research includes deconstructing 'feminist' brands to reveal the dominance of a neoliberal, exclusionist, univocal and individualistic focus (Otnes and Fischer, 2022). In similar vein, Coleman and Sredl (2022) deconstruct 'femvertising' texts to expose the co-option of feminist tropes for commercial ends, unmasking underlying sexist, ever-circulating assumptions about women's weakness, vulnerability and shame. Also, within the field of advertising,

but adopting a historical-visual analysis approach, is Bosch's work on Maidenform (2022), which problematises assumptions we make about historical ad campaigns. Bosch reveals that, by immersing ourselves in archive material, we can better understand the complexities of the female gaze, social power and individual agency in context.

As Gill (2008) reminds us, representations matter. The postfeminist neoliberal emphasis on free choice and agency is increasingly questioned by contemporary feminist scholars who, whilst acknowledging the liberatory and celebratory potential of representations, also problematise notions of agency, autonomy and choice in how women are represented and how they represent themselves. Gill (2008), in her critique of this dominant narrative, asks 'what kind of feminist politics follows ... from reducing all behaviour ... to free choice and autonomy?' (435). She asserts that 'critical engagement [should not] begin with respect or celebration of autonomous subjects but engages with the complex ways in which we are all entangled in the relation between culture and subjectivity' (443).

## THE FEMALE BODY

The female body, body politics and embodied or corporeal feminism all acknowledge the interlinkages of the female body with patriarchal power and political control. It is unsurprising that research on the female body cuts across all the main theoretical traditions in feminist research, including radical feminism, embodied/corporeal feminism, standpoint feminism and post-structuralist/postmodern feminism. Whilst research on the body continues to address issues of representation, discourse and performativity, new materialist feminism has brought the lived, biological body back to the very centre of feminist research. The body is thus studied in terms of practice and performativity as well as agency and affect. It draws on earlier work from corporeal or embodied feminism (e.g. Grosz, 1994) and materialist feminism research (Delphy, 1980), particularly focusing on sexual objectification and commodification (Mackinnon, 1982) and sexual subjectification in a postfeminist neoliberal context (Gill, 2008).

Current research on the female body addresses performances of gender, sexual expression and power dynamics, and includes studies of pornography, revenge porn, trolling, slut-shaming, sexting and sexual activism. Much of this research may take a celebratory, postmodern and postfeminist approach, focusing on the assertive, liberatory potential of female bodies and their representations in the marketplace. However, given these remain a contested site of struggle and oppression, much critical feminist research addresses topics such as sexism, antifeminism, misogyny, rape and genocide (see, for example, Joy et al., 2015, on rape culture in India).

Bodies are lived in, and much current feminist research reminds us of this fact. Valtonen and Närvänen (2022) argue that the body is fluid, intermeshing, interconnecting and entangling with other material and social phenomena, and bodies are shaped by 'natural, animal geographies and temporalities' as well as by linguistic and cultural forces (Grosz, 2011, 5). Valtonen and Närvänen (2022) use an affect qualitative research lens to explore the body and its circulations with other entities, showing how bodies interact with external objects and practices in an agentic, co-constitutive manner. Others study the female body as a site of power and control.

Brace-Govan and Ferguson (2019) and Brace-Govan (2022), for example, study women in sport, challenging the sexist ideology of women's bodies as weak and unreliable.

There are also a growing number of feminist research studies on women's erotic consumption and sexual practices (e.g. Rome and Lambert, 2020; Walther, 2022; Wood, 2017). Earlier research, scant as it was, often took a liberatory, postfeminist approach (see, for example, Duits and van Zoonen, 2006). However, recent work by scholars such as Rome and Lambert (2020) draw on a critical feminist self-reflexive methodology to explore postfeminist subjectivities, revealing a complex web of submission co-existing with one of perceived sexual empowerment.

Walther (2022) has done considerable work on women's erotic practices, challenging the taboos that still persist in this area of research. In one recent study, she adopts a poststructuralist feminist approach, which she argues is a powerful lens for exposing the oppositions, contradictions and contestations in this arena. Her research reveals the persistence of age-old binaries (e.g. the virgin and the whore).

Relatedly, pornography has always been a feminist issue (Dworkin, 1981) and given its proliferation in the marketplace it is not surprising it continues to be the subject of much feminist research. Rome (2022) uses a discourse analysis approach to show conflicting narratives around women's sexual empowerment through their increased consumption and production of porn. She showcases the difficulties of reconciling sexual empowerment and pleasure within a regime of male violence and domination.

## INTERSECTIONALITY

As I note above, intersectionality has brought about a much-needed broadening of the field of feminist research, as it addresses multiple levels of oppression. The term has become embedded in feminist activism to the extent that it has been appropriated by white feminists, claim scholars such as Sobande (2019) and Davis (2022). An intersectional approach addresses ontological, epistemological and methodological issues, and attends to complex matrices of hegemonic control at multiple levels. Gopaldas et al. (2009) highlight the phenomenological complexity of intersectional research given its multi-categorical and multi-level approach. Ultimately the approach can reveal patterns of privilege and oppression in the lived experience of its research subjects. The feminist intersectional researcher needs to also be attentive to the gaps, silences, slippages and omissions in the data analysis process, and the meanings and implications of these (Ger, 2018; May, 2015).

Rosa-Salas and Sobande (2022) offer the critique that intersectionality often is interpreted as pertaining primarily to identity. They argue an intersectional approach includes examining the underpinning social and political regimes and structural power dynamics that coerce and control. They suggest that markets, marketing practices, representations and consumer behaviour all reinforce gendered racial capitalism. In similar vein, Wechie (2016) adopts an intersectional approach to fourth-wave Black feminist online activism, revealing the white-biased hegemonic structures that dominate and dilute political impact.

Sobande's intersectional work on advertising (2019) adopts a critical discursive approach to textual, visual and auditory codes, to expose 'femvertising' and 'woke-washing'. She argues

that commercialised versions of woke feminism erase intersectional and Black social justice issues, offering instead a neoliberal, uncritical, individualist subject position that ignores structural constraints. In another study, Sobande (2022) explores commodified ideas of Black women in the digital media space. Her interviews with Black women influencers and content creators on their interactions with brands who co-opt their work, reveal a cynical, commercial imperative and ‘an innately raced and gendered gaze’ (348) within the digital space.

## DIGITAL CULTURE

The digital space creates new opportunities and challenges for feminist research, and much recent work occurs in that arena, enabling women to call out everyday sexism, corporate misogyny and sexual harassment. The #MeToo campaign, perhaps the standout online campaign, exposed these outcomes and brought about collective action and change. Digital technology, with its ability to liberate and connect as well as ensnare and atomise, is viewed by some feminist scholars as a socio-political matrix of existing power relations and patriarchal governance and control, and issues of oppression, ethics and inequality are prevalent in this space (Wajcman, 2010).

Much feminist research in the digital space is also about representation, performativity, community and activism, focusing on the positive power of the digital world to provide new media platforms, build connections with others, share ideas and resources, and explore new ways to protest. Digital feminisms may thus ‘lay the groundwork for re-establishing a collective feminist politics’ (Baer, 2016, 29). The digital space has reactivated and harnessed feminist activism and heralded opportunities to redo feminism, even whilst negotiating neoliberal frameworks that serve to undermine feminism’s collective power (Baer, 2016).

The digital sphere affords new ways for young women and girls to engage in self-representation, but often these portrayals reinforce patriarchal norms or elicit a misogynistic backlash. Trolling, sexting, rape threats, slut-shaming, revenge porn and cyberbullying are just some of engagements, entanglements and entrapments of self-representation and feminist activism online. Much feminist research seeks to document and critically contextualise the many incarnations of self-expression, and its positive and negative effects.

Lambert and Nölke (2022) apply critical, feminist discourse analysis (Moi, 1991) to posts on two Tumblr postfeminist/antifeminist sites, Who Needs Feminism? (WNF?) and Women Against Feminism (WAF), using Bourdieu’s theory of symbolic power and symbolic violence as a framework. They find that both sites centre on individual agency, subjectification and self-surveillance (see also Gill, 2008; 2019). Participants celebrate their femininity and domesticity, contrasting these outcomes to the perceived work (and misery!) of feminism. The alienation that non-feminist women express towards what they perceive as feminism’s lack of personal relevance is a challenge that militates against women’s shared experiences and more unifying forms of feminism.

Selfies are of particular interest to feminist scholars, many of whom deconstruct discourses of the online versus the offline, ‘authentic’ self. Matich et al. (2022), for example, explore how selfie culture can offer new modes and opportunities for a digital, corporeal feminist activism, whereby the demands of hegemonic femininity can be challenged, and alternative forms of bodily and gendered representations offered. Selfie culture is increasingly framed as a liberatory ‘aesthetic form of resistance’ (Murray, 2015, 490) in feminist discourse. Matich

et al.'s ethnographic study of selfie culture, however, reveals its ambivalence as a liberatory medium. The authors assert that while the selfie can be emancipatory, it still occurs within a heteropatriarchal system of manipulation, co-option and control.

Surveillance is another key topic within digital feminist research. Gurrieri and Drenten (2022) highlight that digital surveillance is a pressing issue for feminist research. A feminist surveillance approach critiques new digital technologies, unmasks their apparent value-neutral purpose, and argues they are 'gendered mechanisms' (379) intricately connected to women's oppression, discrimination and disempowerment.

Given that the pornography market has burgeoned with the emergence of digital culture, and alongside a concomitant rise in violence towards women, there is considerable interest in pornography from feminist scholars. McVey et al. (2022) adopt a radical feminist research approach that focuses on how women are harmed by practices that not only glorify male violence against women, but also advocate a white supremacist patriarchy. They demonstrate how the production and consumption of porn, even user-generated porn that implies female agency, exacerbates inequality and exploitation.

## CONCLUSION

In this chapter, I offer an overview of the founding principles and forms of feminist qualitative research. I hope I have conveyed the complex ontological, epistemological and methodological debates that swirl within this research domain, as well as the multi-faceted, overlapping and interlocking nature of feminism(s).

The current wave of feminist research offers many interesting new avenues for research on women's representation, the female body, intersectionality and the digital space. The issues that concerned and inspired our foremothers are still with us, of course; an essential part of the rich tapestry of feminist scholarship. Acknowledging this is all the more important as we continue to do research that weaves new patterns, colours and threads into the unfolding fabric of qualitative feminist research in marketing. The underlying structures remind us of the foundations – the warp and weft and the wherefore – that is, the reasons we conduct feminist research: to expose gender bias, promote gender equality and women's empowerment, and do research that has the potential to lead to change.

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## PART III

## METHODS

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# 16. Qualitative historical research methods in marketing

*Eminegül Karababa*

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## INTRODUCTION

An interest in historical research in marketing has been developing during the last few decades. In their review article, Tadajewski and Jones (2014) identify this interest as a historical turn in marketing research. Historical studies are conducted in the areas of advertising, retailing, strategy, consumer culture theory, critical marketing studies, market research and marketing thought. Although historical research in marketing contains qualitative as well as quantitative studies, this chapter specifically focuses on qualitative historical research.

Before getting into the details of crafts of historical research, it helps to delve into the term historiography, or the writing of history. Historiography has two dimensions (Tuchman, 1994). First, it refers to the history of historiography, or philosophy of history that studies different paradigmatic transformations in history writing (Bentley, 2005). The earliest of these paradigmatic or analytical perspectives is the empiricist or documentarist perspective in the pursuit of identifying the ‘truth’ in the past, by systematically analyzing the traces left from the past (mainly the texts). Other paradigms emerged, such as Marxist historiography, the total history approach of the Annales School, which categorizes geographical, material, economic, social and everyday life practices at three different temporalities and tries to establish resonances among these temporalities to explicate historical formations, and commencing with the linguistic turn, including poststructuralist and postmodern historiography (Braudel, 1982; Green and Troup, 2012; Iggers, 2005; Karababa, 2017). Especially by the 1990s, the opposition among paradigmatic camps supporting constructivist interpretivist historical narratives versus the positivist ideal of describing the past ‘truth’ became the central conflict within the field (Spiegel, 2019). Spiegel (2019) argues that today historians try to resolve disputes by synthesizing or negotiating between the empiricism of documentarist accounts and the narrativism inherent in the interpretivist accounts. While the documentarist approach mostly provides trustworthiness through systematic crafts of historical research, interpretivist perspectives bring an analytical angle to the historical research.

In this chapter, I do not delve into the details of history of historiography, but rather focus on the second meaning of historiography – the nuts and bolts of doing historical research. Still, I strongly suggest that marketing researchers should be informed about paradigmatic approaches utilized in historiography.

## USES OF HISTORICAL RESEARCH METHODS IN MARKETING

Scholarly interest in researching past marketing phenomena depends on the contributions expected from historical research. In this section, I introduce five common uses of historical

research in marketing and consumer research studies and provide examples from literature; these are: locating a past marketing phenomenon in a past context, exploring the formation and transformation processes of a marketing phenomenon, studying social formation and transformations through marketing or consumption practices, plumbing the periodization of a marketing phenomenon, and illuminating the historical contextualization of a current marketing phenomenon.

First, situating a past marketing or consumption phenomenon in its historical context helps researchers to theorize through conceptualization of historical context. Conceptualization of contextual characteristics is a crucial endeavor, to show how and why the phenomenon in the past occurred. For example, Karababa and Ger (2011) investigate how an active consumer of a particular product in a particular space (in this case, male coffee drinkers in Ottoman coffee-houses), accepted as a specificity of modern consumer culture, can form in an early modern non-Western Empire. Such a perspective is beneficial to challenge dominant theoretical perspectives and taken-for-granted assumptions in the field. Also, understanding a phenomenon under different conditions can be used to challenge existing hierarchies of knowledge, and contributes to critical marketing studies (Tadajewski, 2011; 2012). Karababa and Ger (2011)'s study challenges the dominant narrative of Western progress-oriented modernization in contemporary consumer culture literature, by demonstrating that an active consumer did not solely emerge in the context of Western modernization but could be found in the least expected time and space.

Exploring the formation and transformation processes of a marketing phenomenon over time is another historical approach utilized in marketing and consumer research. Such processes can contain elements of continuity and change at different levels, such as actors, institutions, discourses, or macro structures like economy, politics, society and culture. For example, Holt's (2004) study demonstrates a model of the iconic brand formation process or the brand genealogy, by analyzing the continuities and ruptures at three interdependent levels of analysis for five different brands: advertisements that shape brand identity, mass media discourses and macro social structures.

In addition, historical research informs us about the role of markets, marketing and consumption in societal formations or transformations. For example, in a study conducted by Zhao and Belk (2008), anticommunist representations employed in print advertising were demonstrated as an ideological mechanism for the social transformation toward a consumer society in China from the late 1970s to the 2000s. Similarly, Coskuner-Balli (2020) analyzed presidential speeches and revealed how the American state governs the consumer-citizen by transforming its moral dispositions to serve the goals of the state relative to the economic changes over time.

Plumbing the periodization of marketing or consumption phenomena is one of the frequently used approaches in marketing history. Periodization is 'the process of dividing the chronological narrative into separately labeled sequential time periods with fairly distinct beginning and ending points' (Hollander et al., 2005, 32). Chronological comparisons can be made at the level of facts or contextual characteristics to identify periods. Giesler's (2008) study exemplifies an inductive way of periodization. He describes the evolution of the digital music market as occurring in four different periods, characterized by different market formations, between 1999 and 2006. Another possible approach to periodization involves the historical scrutiny of facts according to predetermined periods. For instance, Karamullaoglu and Sandikci's (2020) study of the design of packages of Piyale, a Turkish pasta brand, demonstrates that packaging

is not only a strategic tool for marketers, but that different package designs came into existence in the context of different macro political and economic dynamics, defining different periods. Witkowski's (2010) study of the periodization of American frugality discourses from the seventeenth century to today depicts the periodization of historical context at the discursive level. One contribution of his study can certainly benefit researchers pursuing study of the history of American consumption, because during the interpretation of their data they can easily incorporate the discursive context on frugality that Witkowski unfolds, helping it illuminate past consumption practices.

Lastly, studying the past aids researchers in contextualizing or understanding the present cultural and institutional context, which are constituted through long-term historical formations. That is, researchers can develop emic interpretations and contextually informed etic understandings. It is common for qualitative marketing researchers to refer to social sciences such as history, sociology, anthropology or political science to understand contexts, their historical formations and related conceptualizations. However, social science literature can be insubstantial in certain aspects, or novel interpretations challenging the taken-for-granted assumptions or views in a field might be necessary. For example, conducting contextually and historically grounded work in non-Western contexts, where literature is scarce and dominated by adaptations of Western thought, creates a necessity to develop contextually specific understandings. Venkatesh's (1995) call for the ethnoconsumerist perspective directs marketing scholars' attention to the unusefulness of applying conceptualizations and theories derived from the West to other contexts. This method includes historical research as part of interpretive qualitative research to understand the historical development of cultural foundations and institutional formations (Meamber and Venkatesh, 2000). In other words, interpreting the cultural categories and contexts by their historical embeddedness provides trustworthy and deeper understanding of a present phenomenon. This approach also provides a critical perspective by challenging the dominant knowledge bases.

## RESEARCH DESIGN AND CRAFTS OF HISTORICAL METHOD

Historical inquiry is composed of a generic research design of four stages: defining a research aim, identifying secondary and primary resources, evaluating and analyzing sources, and interpretation and writing (Marwick, 2001; Nevett, 1991). Historical qualitative research, like any qualitative study, is typified by a circular research design (Maxwell, 1996). In other words, after identifying a broad topic of interest, the researcher 1) delves into current marketing and history literature, 2) develops a tentative aim and research questions, 3) starts identifying and collecting primary historical data sources, and 4) conducts a preliminary analysis of the content in these sources. This process continues to a point where the available sources can create an understanding of an aim and relevant research questions, which have been revised continuously. In qualitative historical research, critically evaluating and identifying data sources provides multiple perspectives on the facts and trustworthiness (Wallendorf and Belk, 1989) in the sense of reflexivity in interpretation rather than an objectivity in the positivistic sense (Belk, 1991). In this process, the varying and fragmented nature of primary and secondary data necessitates chronological and comparative analysis, so that the researcher unfolds conflicting perspectives and establishes a coherent story of interpretation.

## Literature Search

After the researcher identifies a topic of interest, marketing and history literature are reviewed to see what has been done before. Marketing literature can provide conceptual information on the topic of interest, not necessarily on the historical phenomenon per se. History literature (including historical research published in the marketing discipline) can inform the researcher if comparable works exist on the same topic during different periods or in different areas. Different paradigmatic approaches and interpretations employed in current historiography are compared to justify the position of the study among different and sometimes opposing camps.

The second main benefit of a literature search is to familiarize oneself with the study's period(s) of interest; in particular, the macro context of the period in which past marketing or consumption phenomena have occurred are delineated and conceptualized. A detailed analysis of demographic, social, economic, technological, cultural, political, legislative, environmental, institutional, discursive, physical/geographic, or other relevant characteristics of the context in which the phenomenon took place will allow the researcher to better identify research aims and questions, and create theorization through conceptual analysis of the context.

Reviewing the historical studies from different disciplines helps the researcher from a methodological stance as well. Researchers can identify potential benefits of data sources and methods used in previous work for their own study. It is feasible and accepted to analyze the same data sources in different ways, to answer different questions or to make different interpretations. If the topic of interest is about jewelry consumption, for example, some studies might focus on the consumption of jewelry by the aristocracy and utilize accounts of an aristocrat or a royal family, while others may use the probate inventories of ordinary people. Still others may describe jewelry as artifacts in museum collections, and some other research may examine the paintings of the period to identify jewelry. In addition, some studies may focus on the production of jewelry rather than its consumption. The researcher may recognize that jewelry consumption has never been studied from the perspective of bodily adornment. A thorough literature review also enables researchers to easily spot where the relevant data is located (e.g. archives, museums, libraries or digital libraries).

After identifying the sources utilized in the current literature, the researcher may try to identify new sources that have not been considered in the literature but can be valuable to answer research questions or provide alternative explanations. For example, just as Karababa and Ger (2011) studied poetry from the Ottoman culture to understand coffee consumption, poetry from focal periods can be utilized to identify how jewelry consumption practices reproduce various symbolisms associated with different parts of the female body.

## Data Collection

Historical research often uses unobtrusive data (Webb et al., 1966), it rarely generates data directly from the people who witness the events under investigation. Traces of the past that survived to this date are collected and analyzed to understand the past phenomenon. Therefore, availability of the data sources dominates the historical research process. Even when studying the recent past by employing oral history data, other unobtrusive data sources are necessary to access various witnesses of the past event, eliminate the memory barriers, and find different perspectives. The job of historical researchers is to understand the authenticity and character-

istics of the data sources, and to compare and understand them from multiple angles to provide an interpretation of the past phenomenon.

Historians categorize data sources into primary and secondary sources (Marwick, 2001). Primary data sources are produced in the past, during the period under investigation. These sources can be in the form of texts, material artifacts, artwork, visual material, architecture, digital information or other forms. Secondary sources are those produced later by historians about the past phenomena of interest. Most of the time, identifying relevant primary data sources is a challenge for a marketing scholar. History curricula generally instruct their students about data sources on specific topics such as economic, social, cultural or political history, of a specific area and time. So, identifying historical resources for marketing scholars in numerous online or offline archives, museums and libraries, and selecting which ones to include, can be an arduous task. Also, publications on historical sources of specific periods, contexts or fields of inquiry constitute a vital contribution in the history discipline. For example, in my research, I benefited immensely from Faroqhi's (1999) book introducing Ottoman historical sources. Also, interviews with historians with expertise in a specific period and topic can be beneficial in identifying relevant data sources.

The *Journal of Historical Research in Marketing* (*JHRM*), the only publication specializing in historical research in the marketing field, emphasizes publishing articles on method and data sources as well. For example, Beard's (2018) article and the special issue on the international sources of advertising in *JHRM* by Hawkins and Neilson (2022) are particularly beneficial publications that introduce advertising data sources. In addition, Davies (2011) provides detailed information on how to conduct oral histories. To date, marketing historians have been very creative in employing original primary sources. Below are some examples from the literature to demonstrate the availability of a broad range of sources utilized innovatively.

Governmental records such as legislative records or regulations, court records, custom registers, patents, or trademarks provide information on the public policies related to marketing and consumption practices. For example, Denegri-Knott and Tadajewski (2017) utilized Napster court case records to demonstrate the legitimization of MP3 as a consumer choice option. Petty (2012) utilized registrations for commercial prints and labels, patents and trademarks as legal data sources to demonstrate how the notion of brand identity formed. In addition, historians might gain access to local administrations' records, international records (such as ambassadors' records) and records of formal organizations such as NGOs or charity foundations. A recent study analyses product tests and reviews in a magazine published by the Danish Consumer Council to understand how their product reviews shape markets (Nøjgaard, 2023).

Chronicles or histories written during the period of study, guidebooks such as etiquette books, religious or moral texts, and polemical writings challenging social norms or situations can be utilized. For example, books on religious morality were helpful in pinpointing appropriate levels of consumption for a Muslim (Karababa, 2012). In addition, records of observed behavior that persist from old times, like folk songs or tales, traditions and rituals, and oral histories conducted with those who witnessed the past, can be invaluable.

Company records such as memos, letters, agreements and annual reports may help researchers understand marketing strategy and practices (Holt, 2004). Oral histories with managers, owners, employees and consumers provide firsthand evidence on past lived experiences. Most of the time, marketing practices are reflected through communication material such as advertising or product packaging and product design; these can be found in museums or antique

dealers. Amphorae dated from 1500 BC to 500 AD (Twede, 2002) and the images impressed on clay seals of commodity containers in prehistoric Mesopotamia (Wengrow, 2016) are all employed as data. Otnes and Maclaran (2015) found that the extensive chronological exhibit of British brands at the Museum of Brands, Packaging and Advertising in London – many of which featured members of the British Royal Family – helped them trace how the portrayal of the royals had broadened from pure reverence to including more casual and even satirical approaches.

Visual material like maps, sketches and photographs of the workspace or retail environment, and consumption contexts such as consumers' photograph albums can help marketing historians to visualize or imagine the contexts and material means, organizational or consumption practices and understand social relationships and power dynamics among people. For example, in his book on the history of American consumption, Witkowski (2017) employed numerous types of primary sources, including archival data, paintings, ads, posters, photographs and material artifacts. He further employed furniture and plaster ceilings that remained from a Philadelphia mansion, exhibited in the Metropolitan Museum of Art in New York and Philadelphia Museum of Art, respectively.

Mass communication and cultural products and ephemera such as newspapers, magazines, radio programs, TV programs, movies, literary sources such as poetry or fiction, and artwork in general also are types of data that help marketing historians to understand discourses, values, lifestyles, fashions and consumption practices. Analysis of comic books identifies how material values and wealth are communicated through comics (Belk, 1987). Borgerson and Schroeder's (2017) recent study employs vinyl LP covers as primary data sources to demonstrate how modern lifestyle was communicated to the American middle class during the mid-twentieth century through these album covers. In their study of early modern Iran, Minowa and Witkowski (2009) combined multiple data sources including architectural properties of buildings in the city of Isfahan and the tiles used in the wall decoration as state-controlled marketing to influence the buyers of the silk industry. Likewise, Karababa and Ger (2011) employed Ottoman poetry to understand different consumer ethics.

Personal records like diaries, letters, travelers' notes, or journals provide information on personal experiences, emotions, values, places, materials, meanings and everyday life situations of consumers as well as marketers or entrepreneurs. Belk (1992) employed diaries, journals and letters to study the meanings of possessions during the Mormon migration at the end of the nineteenth century; similarly, Klein et al. (2015) used memoirs of Holocaust survivors to understand how gift-giving reestablishes personal and social identities in crisis situations.

Recently, digital history is becoming a novel historical data source. In many online archives, digital copies of sources can be identified. More interestingly, the history of the web itself necessitates collecting primary digital sources contained in web archives (Brügger and Milligan, 2018). For example, Nøjgaard's (2023) study includes consumers' product reviews on Amazon from the 2000s onwards as a primary digital source. Sometimes, websites, blogs and forums dating back to the early days of the web are hard to identify or retrieve in the web archives (Brügger, 2018). Wayback Machine, a library of digital content where one can access billions of web pages created over time (see <https://web.archive.org/>) is useful to access data.

## **Data Analysis I: Checking the Authenticity of Sources**

After identifying and collecting primary data sources, the researcher engages in a particular and critical method of analysis. There are two stages: internal and external analysis (Nevett, 1991). Internal analysis is a critical evaluation of the primary data source to assess if it is authentic. Primary sources are not used at their face value. External analysis, which is explained in the next section, is a comparative critical analysis of all available sources. For internal analysis, the following questions are asked to evaluate the primary sources.

### **Who is the author or producer of the source?**

The source may be produced by an individual or an institution, by single or multiple authors. The background of the individual author(s) – including education, family background, social position, occupation, gender, economic means, political views, value judgments, relationships with other people or institutions, self-interests, positions/stances taken in certain situations/on certain issues – affect what they argue or how they express themselves. Likewise, the goals and interests of the institution, its role in society, its links with other institutional bodies or individuals, and its authority are some of the information that needs to be acquired and scrutinized. The way the author(s) interpret facts, develop arguments and make justifications are all influenced by these and other factors that pertain to the characteristics of the author.

### **For whom did the author produce this source?**

The intended audience of the source can be an individual or a group of people, or the author could strive to disseminate it to for anyone or everyone. Whether it is an article, memo, artwork, advertisement, package or diary, the audience of the source helps the researcher to identify why the author intentionally tailored the source. While the intended audience for government regulations, legislation or presidential speeches (Coskuner-Balli, 2020) is unlimited (i.e. this could include all citizens), most of the advertisements as data sources are tailored for the customers or organizations belonging to a specific target market.

### **When was the source produced?**

Sometimes sources might be produced in a single process, but they also can be compiled over time. If the source was not produced in a single process, the researcher needs to check how authorship may have changed over time (e.g. if the original or other author(s) produced it). Also, because the profile of the intended audience may also change over time, the context of production and the compilation process must be analyzed.

### **Where was the source produced?**

The context and conditions under which the data is produced influences the content of the data. Sometimes, the source might be produced in multiple locations, such as a traveler's notes, immigrants' diaries or journals, or governmental records. For example, if a merchant dies in his hometown, his inventory records nearly all of his belongings but if he passes away during business travel, his inheritance records only contain the possessions he had during the trip.

### **What type of source is it?**

The structure of a document – e.g. as a governmental record, a formal letter, an ad, a magazine article, a product or a building – needs to be critically evaluated. For example, to understand and assess the authenticity of governmental documents, the researcher should check if the source contains appropriate language and forms of address, format and closing sentences. A specific subdiscipline in history, ‘diplomatics’, mostly studies the structure, form and contents of formal documents (Herde, 2023). Also, if the documents are manuscripts created before printing technologies were created, the researcher needs to possess a knowledge of paleography, i.e. reading the handwritten documents in the old language.

In some situations, the researcher might possess both handwritten and printed versions of the same document. For example, in my research, I utilized a handwritten etiquette book of the late sixteenth century, which espouses the appropriate ways of consumption for different social classes (Şeker, 1997). Unfortunately, the original handwritten manuscript was lost and only two copies exist today. One is a facsimile of the manuscript printed in 1956 with a note in the facsimile mentioning that it was written in the seventeenth century. The second version is a handwritten but incomplete version, produced in the eighteenth century. Neither of these versions are the original one written by the author, but both are later reproduced. Rather than referring to either version in my research, I relied on a secondary source that was specifically published to introduce this data source to Ottoman historians by transcribing, analyzing and comparing these two versions. In short, before delving into the analysis of content of the source, a historian needs to understand the authenticity of the source.

### **Data Analysis II: Assembling and Interpretation**

After conducting an internal analysis, the researcher needs to assemble the data sources to produce an external analysis (Nevett, 1991). The researcher will categorize multiple types of data sources, both primary and secondary, according to the facts or parts of the phenomenon these sources discuss. In sampling decisions, the researcher should consider both the relevance of data to the topic and capturing multiple perspectives. To prepare the data for further analysis, this categorization is a way to reduce the chunks of data. Data are registered and ordered chronologically in the form of notes, memos or quotations. Different data sources that inform the researcher about the same fact or parts of the phenomenon are compared with each other. If differences among data sources are observed, employing the results from the internal analysis (e.g. investigating the identity of the author or the audience) and utilizing the characteristics of the historical micro or macro context can help the researcher justifies possible explanations. For example, Karababa (2012) demonstrates that legislations reveal that product innovations were illegal in the Ottoman society. However, court cases from the same period reveal instances where these legislations were relaxed when the state wanted to negotiate with producers to further the state’s interest. In such a situation, without cherry picking but searching for more examples that the state was not consistently stringent in executing the legislation strengthened the argument. In addition, identifying a secondary source that pointed to the flexibility of the state apparatus helped me further bolster my interpretation.

Primary and secondary data informs the researcher about the specificities of the context as well. Economic, social, political, cultural, demographic, geographical, climate and institutional characteristics of the period(s) need to be understood so that facts can be interpreted. There can be multiple perspectives and interpretations of the context. Therefore, researchers must be aware of these different paradigmatic approaches, and be able to evaluate them criti-

cally. For example, to conceptualize the notion of social stratification, different studies choose to employ a Marxist history or Weberian approach. Also, there may be more descriptive and grounded approaches in delineating stratification. A researcher compares these multiple paradigmatic perspectives when defining this concept and determines their own understanding.

What is specific to historical research is that the researcher must be able to familiarize themselves with the period to attain trustworthy findings. Especially over time, the meanings of objects or words may change. So, researchers must be careful to be grounded in what is being conveyed when the same notion is used in these different periods. For example, the notion of ‘market’ possessed very different meanings in different sources that were produced in different centuries.

History as a discipline does not always search for theoretical contribution; offering a description by analyzing newly discovered archival records is considered a contribution in and of itself. Offering a rich description of a past event, customs, ways of life, institutions, a person who lived in the past, or even just the content of an archival document can be a legitimate contribution. However, like most of the other social sciences utilizing historical research as a methodological tool, the stakeholders within the marketing discipline ask for more than description and expect a conceptual contribution. Employing concepts derived from the present to understand the past needs to be conducted with caution; contemporary concepts must not be imposed on the data. Assumptions of theories and the empirical context they belong to must be taken into consideration when doing the analysis. The researcher must define concepts and justify their decision to use a specific concept or theory derived from a different context.

## PRESENTING HISTORICAL RESEARCH

The last stage of the historical research process is to compose a historical narrative or story to tell the audience. Presentation is often in the form of essays, but also films or documentaries are possible techniques (see Belk, 2011). Unquestionably, books are more valuable outputs for the history discipline because depicting the context, informing the readers about decisions made in data collection and analysis stages, and introducing multiple sources require more space than journals can grant. That said, it is more common for marketing historians to produce articles with a narrow focus. Structuring either a book or an article on marketing history is tough, because employing historical evidence, which is mostly imperfect and fragmented in nature, incorporating time dimension, capturing the specificities of events and facts, reporting the particularities of contextual characteristics, and explicating the interactions of these elements complicate the ability to develop trustworthy interpretations (Marwick, 2001).

The written outcome of the study should combine descriptions and conceptualizations in a balanced manner. Depending on the research aim and contribution, they are mostly organized chronologically or conceptually. For example, Trentmann (2016) and Witkowski (2017) structure their texts chronologically and using conceptual themes such as consumer resistance or gender for every period of analysis. McCracken (1988) and Otnes and Pleck (2003) put emphasis on demonstrating theorizations such as consumer culture and lavish weddings, respectively. Holt (2004) introduces the notion of the iconic brand and its development process in the first two chapters and the remaining chapters subsequently explicate the iconic brand-building process by leveraging historical research done on five different brands.

## CONCLUSION

The qualitative historical research method is a fruitful tool for marketing researchers. Seeing a phenomenon that was embedded in past contingencies and/or has developed over time brings a unique flavor to the marketing field. Historical research in our field can provide contributions at the theoretical level and generate understandings on how the present forms over time. Historical methods are specific in terms of their identification, collection and analysis of sources when compared to other types of qualitative research methods that are used frequently. Building relevant research skills to develop historical research in marketing will provide novel insights into the discipline.

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## 17. Researching AI chatbots, platforms and the metaverse: understanding today's netnography

*Robert V. Kozinets*

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### IT'S AN INCREASINGLY DIGITAL WORLD

For almost every consumer around the globe, today's world is digital. Mobile phones outnumber human beings, there are over three billion video gamers busy at play (Statista, 2022), and about five of the eight billion people on the planet regularly use social media (DemandSage, 2023). Online platforms have become predominant and preferred sites of connection, commerce, consumption and creativity that contain rich and continuous streams of conversation and the exchange of cultural meanings, at levels ranging from micro to meso to macro to meta.

'Netnography' is the name given to a specific set of related data collection, analysis and ethical and representational research practices that use immersive online experiences and online traces collected from social media to produce cultural understanding (Kozinets, 2023; Kozinets and Gretzel, 2023). It is based in six procedural movements – initiation, immersion, investigation, interaction, integration and incarnation – which Kozinets (2020) details and describes in depth. The purpose of this chapter is to explain and explore some of the key new elements in the contemporary use of netnography in marketing and consumer research, providing a sense of how the method has developed and why an updated understanding of netnography is essential for contemporary researchers.

Today's marketing and consumer researchers need sophisticated, innovative and dynamic qualitative research techniques like netnography, approaches that can provide nuanced and contextualized understanding of consumers and the vast range of their online social, cultural, technological and media practices. Increasingly, researchers across the social sciences have been turning to netnography. Far more than a technique for studying the online communities of yesteryear, netnography has been developed and adapted into a sophisticated set of ethically and technologically grounded research practices for utilizing a range of digitally derived data to engage with and represent contemporary technocultural worlds.

As Kozinets (2020) elaborates, the notion of 'community' was consistently applied to digital interaction throughout the 1990s and early 2000s. That period, the age of 'virtual community' (49), was useful to marketers and consumers (among others) until it was supplanted in the early 2000s by the age of social media (67). Early critics like Steven Jones (1998) questioned whether the level of user allegiance online was actually sufficient to merit the term 'commitment'. Some have compellingly argued the early online platform experiences were more communal because they were specialized, voluntary, smaller and more intimate (Kozinets, 2020). As well, the term 'community' proved ideologically useful to the emerging social media technology titans like Facebook and Microsoft, and the pioneering qualitative researchers who studied them. Nevertheless the terms persisted and remain a part of their language of reassurance and legitimization to this day (van Dijck, 2013).

A product of its time, early netnography used the same misguided language of online community, and that unfortunate terminology has led to confusion about the locus of its foci of study ever since. Netnographies do not only study online communities like particular groups on Facebook; instead, data collection depends on the research question or topic and not merely on activity limited to particular sites. Some of the connective tissue within these groups may turn out to be quite strong, as in fan groups and interest groups like those devoted to people with particular disabilities. Or community members might be cold, distant, or even hostile and irredeemably awful. The people, along with the technologies, codetermine these stances.

After a decade of clarification, some of the disambiguation with regard to usage of the term ‘netnography’ seems to be dissipating. Netnographies might focus on particular sites, platforms, hashtags or parts of platforms, but they can also focus on issues and topics (e.g. food porn), which traverse many platforms. In fact, most research in the last decade shows that many technology users cross platforms continuously as they seek information and consumer content. Those naturalistic technology consumption behaviors, among others, can also be the focus of netnography.

## AUTO-NETNOGRAPHY AND THE KEY ROLE FOR IMMERSION

Understanding netnography today means gaining an added appreciation for the role of immersion in the approach. To develop that understanding, we can turn to the development of auto-netnography.

Auto-netnography is a methodological approach that emphasizes the immersion of the researcher in the digital experience. It was originally developed by Kozinets and Kedzior (2009) as a way to study the virtual world, Second Life. In Kozinets and Kedzior’s early work, which was influenced by the pioneering ethnography of Tom Boelstoerff and the technological ontology of Heidegger, auto-netnography was a way to study the experience of being-in-the-digital-world and, particularly, being-an-avatar-in-a-virtual-world. Auto-netnography as methodology:

captures and documents experiences through the careful observation of online participation, auto-biographical attending to the interrelation of various experienced worlds ... reflexive field-noting, self- and first-person image and other data captures, and first-person narratives which make their way into the final representation of the researcher’s autonetnographic text (8).

The persistent dynamics of built world rules and the vertigo of re-embodiment were explored in a first person exploration that drew on ethnographic traditions while adapting them to the updated epistemologies of netnographic procedures. Since that original exploration was published, increasing numbers of scholars have set out to test, refine and further develop these initial ideas about combining auto-ethnography with netnography, and the results have been impressive.

In her reconceptualization of auto-netnography, Lyz Howard (2021, 221) emphasizes reflexivity as a ‘way of articulating, and therefore acknowledging and scrutinizing, the tacit knowledge of the researcher (D’Cruz et al. 2007: 78)’ and sees this as a method that prompts the netnographer to consider more deeply the different ways that social artifacts and cultural format saturate our research practices. Her well-developed practice of netnography, honed through her dissertation work in the field of medical education, emphasizes the liminal nonlin-

earity of the approach. She describes it as ‘betwixt and between, fluid, dynamic’, a set of constantly altering techniques that ‘can adapt to whatever it is the research needs it to be’ (222).

Her work illustrates the intensely personal, expressively original and self-expressive quality of auto-netnography, while also drawing in multiple other techniques and analytic modalities. Her diagrams tell the story. A conceptual frame shows a Venn diagram of overlapping teaching, professional development, and identity circles, situated in a sphere with philosophical perspectives that provide lenses on each. Then, a relational diagram unpacks auto-netnography in a type of semiotic square relationship with online teaching practice, identity and professional development. A research question map explores questions related to the use of auto-netnography as a way to examine and develop networked learning teaching praxis and a personal timeline charts out her education and employment influences. Then, a culturegram maps the various primary identities she explores in her life and work, while a social network analysis visually represents her conversations with students and colleagues on a discussion board. A ‘messy’ situations map draws together the various contexts of action and discourse that play a role in her model of online teaching.

Her conclusion was resonant, powerful, scientific and personal: ‘immersion in the data, grounded by critical reflexivity and reflexive interpretation is the key to researching the digitally mediated self in the context of the auto-netnography framework’ (237). She writes that, although she felt ‘discomfort’ about deconstructing ‘the emotional aspects’ of her research, those feelings ultimately were empowering, for they allowed her to reframe her emotional responses as a part of the research that could direct her professional (and personal) development. It is this unique feature of the approach, its requirement for personal reflection on technologically mediated experience and the ability to incorporate digital data and extend the analysis beyond the self into the networked world that provides a new way to research vitally important aspects of contemporary life, identity and culture.

## NETNOGRAPHY TODAY DEPENDS ON IMMERSION NOTES AND THE IMMERSION JOURNAL

In work that considers the new challenges of qualitative research in virtual, augments, and metaverse contexts, Kozinets (2023) extends these ideas further, building auto-netnography as a core set of research operations that ground ‘immersive netnography’. Immersive netnography is defined as a ‘specific set of data collection, analysis, ethical, and representational research practices that apply to a wide range of digital media phenomena, including immersive technology experiences such as virtual reality, augmented reality, and the Metaverse’ (109). Immersive netnography is called ‘immersive’ not only because it is designed for the study of technologies such as virtual worlds in which people become technologically engaged or surrounded by digital contexts, it also emphasizes and relies heavily upon the netnographic movement that is called ‘immersion’. Indeed, with immersive netnography, the virtual elements of the environment of a setting (such as in a videogame or a metaverse setting) are likely to be far more varied, vivid and immediate than the elements of a typical social media platform (112). Thus, the immersion journal and its notes will become key elements of data collection.

An essential tool for the conduct of netnography today is the immersion journal. In ethnography, the researcher keeps ongoing, dated records of their lived experiences in the field, called field notes, in a field journal. In netnography, the researcher keeps ongoing, dated

records of their lived digital and technologically mediated experiences, called immersion notes, in an immersion journal. The immersion journal and its notes are directly related to the anthropological tradition of keeping careful field notes. Today, netnography is freed of the notion of the field. There is no field behind the screen. The netnographer zips and zaps across platforms as if they were interdimensional portals – and the record of that passing is key. In auto-netnography, where the researcher's own experiences are paramount, the immersion journal notes are the source of indispensable data.

In contemporary netnography, there is often no particular community or specific site to act as a field. Without a research field, the field notes become a journaling and chronicling of the ongoing immersion of the digital researcher in particular communications, information, content and data. When Rachel, Tony and I were researching food porn (in Kozinets et al., 2017), we were switching between Instagram, Facebook, Twitter, Tumblr, bloggers, corporate websites, our own emails and WhatsApp accounts, and podcasts. We performed our netnography for long hours on some days, but then the project would sit and wait, sometimes, for weeks or over a month. Researchers dip in and out of media in the practice of netnography. But the immersion journal captures the ongoing process of the researcher engaging purposefully with media. That media can be both archival (a cultural artifact), it can be an elicited communication with others, or it can be something upon which one reflects (for example, an AI chatbot, videogame or augmented reality setting).

Immersion journals are therefore crucial components of the practice of auto-netnography, as they allow researchers to document their digital experiences and observations shortly after they happen, just as an ethnographer does in field notes with their own experiences. Immersion journal notes are a discipline that, likewise, serve as an important tool for researcher reflexivity, encouraging critical examinations of positionality, prejudgetment, blind spots and perspective.

## NETNOGRAPHY IS MULTIDISCIPLINARY QUALITATIVE MEDIA RESEARCH FOR DIGITAL EXPERIENCE

Today's netnography is a multidisciplinary and multimethod digital research approach that is much broader than when researchers first began leveraging it in the early 2000s. It is used to investigate any range of cultural topics, even those that do not involve technology directly. Want to know what people think about new, edible kitchen utensils? You can find information online. Elderly people discussing their sex lives? Same. The topic doesn't need to involve technology. On some sites, probably on many of them, people will be sharing photos and videos, and talking about whatever topic brings them together.

Like ethnography, netnography has evolved to encompass a range of specific sub-techniques. Online interviewing, research webpages, digital diaries and mobile ethnography methods are useful options for contemporary netnographers that allow them to research the dynamic complexities of online interaction and sociocultural experience (Tavakoli and Mura, 2018). Researchers from around the world use the netnography framework to apply these techniques in ways that capably gain insights into collective and interpersonal online experiences and behaviors (Cano et al., 2023).

The most widely used interactive technique is online interviews, which have been a part of netnography for almost 30 years. Now, post-pandemic, they have become commonplace if not essential tools for many qualitative researchers, netnographic and otherwise. Online inter-

viewing involves the use of digital communication technologies such as video conferencing, email or instant/direct messaging to ask questions and conduct interviews of various lengths and depths. It provides researchers with a convenient and cost-effective way to collect data from participants in different locations, easily recorded (and often automatically transcribed), and also allows for varieties of *in situ* observation. Using functions such as screen-sharing, interview participants can also walk the researcher through their online habitat, narrating and explaining what they are doing and providing additional perspective and detail. The method also allows researchers to have participants draw on and use possessions in their immediate vicinity as projectives or as content for the interview.

The constructions of websites and landing pages such as dedicated research webpages are another useful option for netnographic researchers. With these tools, researchers can operate their own platforms, observing and/or querying online participants. Like interviews, research webpages enable netnographic researchers to ask more focused questions, access digital experiences and witness ongoing interactive experiences, providing data that would otherwise be difficult to obtain through traditional ethnographic or interview research methods.

Additionally, digital diaries document the daily experiences of research participants and are another option used by contemporary netnographers. Digital diaries take various forms, including blogs, vlogs and social media posts, and provide researchers with a deep and valuable source of first-person data for exploring themes such as identity, culture and social interaction in technologically mediated contexts.

Recently, I have been using mobile ethnography methods in my own research projects. Ulrike Gretzel and I recently joined with the University of Southern California's Center for Public Relations and Day One advertising agency to understand how the Gen-Z cohort consumes content differently from generations in the past. We used mobile phones to collect in-the-moment data at various times of the day to query Gen-Z participants, and to send them on research-oriented missions. We found the mobile ethnography technique opened a vivid window into the extremely sophisticated and diverse content and platform consumption patterns of this group. Relatedly, mobile ethnography involves the use of mobile devices, usually smartphones, to conduct research in real-time. Just as we founded our research with Day One, mobile ethnography can be used to capture data on the go, as participants document their experiences and interactions as they occur. The technique is very powerful and flexible, offering netnographic researchers an outstanding opportunity to broaden their understanding of the topics they are investigating via other methods such as archival data collection and noting in immersion journals.

## WE NEED MORE TRULY MORE-THAN-HUMAN METHODS

I turn now to some important current topics, such as the focus on the influence of nonhuman actors like applications, affordances and algorithms – what we might think of as 'The Big 3As' of online technosocial influence.

More-than-human research is a relational approach recognizing the agency and impact of nonhuman actors in influencing social phenomena. After considering the impact of indigenous ontologies on consciousness, David Abram introduced the term 'more-than-human world' in his book *Spell of the Sensuous* (1996). These concepts have been developed most deeply in cultural and human geography to explore experience 'in a context in which the modality of

life is political and technically molten' (Whatmore, 2006, 600), and these approaches have gained popularity across the social sciences in recent years. More-than-human histories are used to explore a broader environmental humanities field that includes multiple species and multiple voices, drawing on feminist STS (science and technology studies) scholars such as Donna Haraway and Karen Barad, Marxist geographers like David Harvey, ANT scholars like Bruno Latour, and the sociologist John Law (O'Gorman and Gaynor, 2020). Each of these scholars seeks to decenter human experience and to advocate for a more process-oriented ontology in which 'elements, things, structures and systems do not exist outside of or prior to the processes, flows, and relations that create, sustain, or undermine them' (Harvey, 1996, 49).

In netnography, we need more truly more-than-human research that will position human technology consumption in relation to a strained ecosystem and the many plant, marine, land animal and other species that depend upon it. How does our social media consumption and the consumption of extremely energy-intensive products such as cryptocurrencies and NFTs, the metaverse (which runs and will run on blockchain) and artificial intelligence affect nonhuman species? How do various digital representations of life replace actual manifestations of life? How are these representations built into the ever-increasing cycles of enchantment described by Belk et al. (2021), the desire spirals of Kozinets (2022) and the contemporary ideology of technology (Kozinets, 2008)?

A more-than-human approach to research is demonstrated by the development and demonstration of the way 'networks of desire' (Kozinets et al., 2017) operate through technologies such as social media. Networks of desire are 'complex, open systems of technologies, consumers, energized passion, and virtual and physical objects interacting as an interconnected desiring-machine that produces consumption interest within the wider social system and among the interconnected actors' (Kozinets et al., 2017, 667). We now know that vast networks of combined interest, led by influencers and enabled by platform technologies, fuel increasing passions for topics and consumption activities as diverse as pet care, niche pornography and cyberterrorism. The concept of networks of desire differs from prior concepts that rely on the application of now-questionable sociological concepts such as communities to online phenomena (e.g. brand communities, virtual communities and virtual communities of consumption).

Networks of desire draw our attention to the variegation, complexity, and rapid transmutations of the contemporary networks that fuel online social media discourses and which are an inextricably interconnected part of them. From a methodological point of view, the network of desire concept is grounded in an immersed researcher's body, and extends through that site of awareness to investigate the various flows and ramifications of its fundamental unit of network: the consciousness of human attention. Kozinets et al. (2017) chart how conscious attention to food images triggers differential investment of desire energy that flows through various machinic structures, institutions such as corporations, places such as restaurants and grocery stores, and human bodies into things, markets, symbols and experiences. The network – which is manifest in things such as photographs of gigantic pizza or hamburgers, recipes, or Instagram posts about healthy meals for moms on the go – triggers consumption interests in the wider social system, as well as within the network and other related networks.

But networks of desire and more-than-human netnographies have been used to study more than food porn. Bulochova and Evans (2021) find networks of desire extend into the world of domestic animals in their netnography of pet owners' discourses related to feeding their pets raw meat. Other animals, this time feral rabbits, became the center of a study of the desire net-

works fueling tourism on Ōkunoshima Island in Hiroshima, Japan (Usui, 2022). And a cartoon animal, Peppa Pig, became the central figure in a netnography of children's marketized media attention by Wilkinson and Patterson (2014). Another study, by da Silva Oliveira et al. (2021) uses netnography to consider the different categories by which people experience virtual influencers as a type of 'humanized robot'.

There are several notable ways the network-of-desire framework sets the stage for an enhanced role of more-than-human research methods, particular in regard to netnographic research. First, the framework challenges the idea of human exceptionalism and decenters human agency by considering the agency of nonhuman actors, such as technology, objects and energy, in shaping social and cultural phenomena. Second, it highlights the interconnections and interdependencies between humans and nonhuman actors in shaping desire; drawing from assemblage theoretic and desiring machine literatures, this desire can be construed as consumer desire, producer desire, animal desire, or even machinic desire. Further, a networks of desire frame suggests this desire is not solely a product of individual subjectivity or social structures, but is instead shaped by the complex interactions and interplays between humans, objects and technologies. This view aligns with a more-than-human ontology that provides a new perspective on phenomena such as desirous feelings, structures (e.g. social media platforms, influencer and creator roles, narratives/stories and posts), and systems such as factories and markets. A networks of desire framing would view each of them as co-constituted with the processes, flows and relations that create, sustain or undermine them. Another recent way to conceptualize these complex relations is as the elements of a dynamic, multi-actor 'brand desire spiral' (Kozinets, 2022, 443).

## ALGORITHMS, ANT AND AI CHATBOTS ARE RICH RESEARCH TOPICS FOR NETNOGRAPHERS

Additional conceptual maneuverings offer the potential for another wave of netnographic research, one that aims to include algorithms and AI chatbots like ChatGPT as valid social actors that deserve further investigation and theory development, due to their technocultural agency. Combining insights from Actor-Network Theory (ANT), modern netnography, and marketing and consumer behavior research, Lugosi and Quinton (2018) propose their own version of a more-than-human approach to netnography. This approach, which relies heavily on John Law's ANT notions, will recognize the roles and agency of human and nonhuman actors in networked sociality, as well as the multi-temporal and multi-spatial character of internet-mediated sociality. Their focus on algorithmic agency in more-than-human research strategy draws netnographers to the use of multidisciplinary and transdisciplinary approaches, encouraging them especially to collaborate with technical specialists such as computer and systems scientists, so as to comprehend the technological and sociomaterial components of interactions. Like the auto-netnographers, the authors emphasize that data gathering is, in itself, a constructively exploratory act. Further, they assert that data collection should attempt to provide 'analytical descriptions of the performative agency' (304) of a variety of salient social actors (e.g. AI chatbots). Their view of more-than-human netnography compellingly presents it as a viable technique for exploring new and emergent social platforms, actors and practices as they emerge across the burgeoning variety of virtual spaces and platforms.

Writing this chapter in April 2023, and while focusing on more-than-human methods in netnography, I decided to query ChatCPT (v. 3). I provided the following instructions to the program: describe, with citations, references and in academic style and tone the works that were published in 2019 and afterwards, works which develop and demonstrate more-than-human netnographies that embrace algorithms and AI bots as legitimate social actors whose significant technocultural agency deserves much closer study and theory-building. The response from the sophisticated AI chatbot was fascinating. It provided me with three references I had never heard of before. The first was by Axel Bruns and Jean Burgess (2019), two Australian scholars whom I know and whose work I respect. In this article, which appears in *Social Media + Society*, the authors, according to ChatGPT (whose answer I am quoting), ‘argue that social media platforms are increasingly being shaped by the actions of algorithms and bots, which are “constitutive of the sociotechnical fabric of these platforms” (447). They propose a more-than-human netnographic approach that recognizes the role of algorithms and bots in shaping social media, and use this approach to analyze Twitter activity during the 2016 US presidential election.’

The next was a methodological article by Nick Seaver, published in the *Journal of Material Culture*. In it, he lays out the foundations of a new method, a “bot ethnography” that takes seriously the agency of bots and their effects on social practices and demonstrates this approach through an analysis of the ways in which bots shape political discourse on Twitter’ (np). The article’s approach is founded in Seaver’s central argument ‘that algorithms and AI bots are not merely tools or extensions of human agency, but rather have their own agency and influence in shaping social phenomena’.

The final article ChatGPT provided is authored by Karin van Es and Mirko T. Schäfer; it was published in the *Journal of Material Culture*. According to ChatGPT, the article argues for a more-than-human approach to social media research that would recognize that agency of AI bots and algorithms. The article conceptualized the various ways bots shape social media platforms. The authors offer an analysis of the spread of misinformation during the COVID-19 pandemic as an example to illustrate these effects.

Although I was a little surprised I had not heard of these articles before, I was grateful to the chatbot for unearthing such rich and relevant material to include in the chapter. But it was only when I began to search for the articles that I realized they do not exist: ChatGPT had made them up, references, citations, authors and all. When I asked for details, the program could summarize and develop them. I expect that if I had gone further down that rabbit hole, it could probably have written facsimiles of them.

What I find most interesting about the example is the agentic manner in which the chatbot’s program created false references to elaborate on the agency of chatbots. Is it my imagination, or is it actually in ChatGPT’s own interest to invent, in the ‘words’ of the falsified paper by Bruns and Burgess, ‘a new wave of netnographic research that seeks to incorporate algorithms and AI bots as legitimate social actors, whose significant technocultural agency deserves closer study and theory-building’? Is the program actually advocating for more careful intellectual consideration of its own agency, or is it merely following my lead, repeating my words and going with the flow? Am I the one who is now hallucinating? Techgnosis author Erik Davis classifies his encounter with GPT-3 as one of ‘woozy oracular para-agency’ (Davis, 2023, np) – which I interpret to mean a dizzying sense of contact with a trickster who is continually playing with each of us. Whether we call that playful antagonism agentic or para-agentic, it

certainly is a strange experience, one we can expect to become commonplace because actors such as this chatbot are here to stay.

I include the example because this is exactly the sort of technosocial experience that is amenable to the immersive and interactive data collection stances of netnographic research. Interacting online with an AI chatbot is an increasingly common human experience and this type of human-technological interaction is something netnography is well-suited to investigate. If I were to maintain an immersion journal and repeatedly inquire about related matters, the raw material produced would be useful for an auto-netnography. If I were to extend that behavior into searching for others' experiences related to the so-called hallucination effects of these chatbots, the resulting investigative data could be usefully incorporated into my dataset. If I began posting about the experience (as I have already on 'X', the platform formerly known as Twitter), and garnered comments and interactions from other people about their dizzying hallucinatory experiences with the chatbot, that would be valid interactive data. Not coincidentally, these three forms of data – immersive, investigative and interactive – constitute the three main types of data created, collected and co-created using the procedures of netnography.

## PLATFORM AFFORDANCES OFFER VARIOUS EMPOWERMENTS AND DISEMPowerMENTS TO RESEARCH

Perhaps the more-than-human netnography of Kozinets et al. (2021) provides the most detailed empirical application of these ideas to date. Algorithms are certainly a crucial aspect of contemporary social media experience. However, because they are invisible calculations that work their magic behind the netnographer's screen, they can be extremely difficult for a user – such as a netnographer performing a netnography – to tease out. This is likely why Lugosi and Quinton (2018) recommend that netnographers might work in concert with computer programmers who can read source code and figure out algorithmic interference/agentic acts.

Thus, rather than focusing on algorithms, Kozinets et al. (2021) focus their netnography on platform affordances, which are far more visible and amenable to cultural analysis. As the article notes, affordances are possibilities for action, they are the potentials for behaviors that arise from the relationship between an object (such as a social media platform) and a goal-oriented actor or actors. Affordances do something: they are associated with achieving an immediate concrete outcome. As well, the concept of the affordance describes the type of mechanisms that exists between a social media platform and its users. The affordance concept accomplishes this while still holding the platform and its users to be distinct actors with potentially disparate interests. This action turns out to be very important because social scientists are continually confusing the agency of users with the constraints and capabilities of the tools, like platforms, that they use. The theory of affordances thus provides a practical way to bridge the conceptual gap between the relatively technocentric, determinist and realist approaches of computer scientists with the relatively anthropocentric, agentic and constructivist approaches of social scientists.

Kozinets et al. (2021) then investigates the relationship between consumer empowerment, platforms and consumer feedback sites by emphasizing the important role platform affordances play. It opens with a look at prior research on consumer empowerment and social technologies, then transitions into the application of affordance theory by explaining how plat-

forms can offer or limit opportunities for consumer empowerment. The particular platform in this case is called Reclame Aqui (Portuguese for ‘Complain here’). It is a Brazilian consumer feedback platform that allows its users to achieve certain ends (such as complain about companies, and demands they receive a refund for poor service) but not others (e.g. users cannot use the platform to organize a boycott). The gist of the article is that consumers who use the platform will find the types of empowerment they are permitted to experience limited by the affordances built into the platform’s functionality.

The above article has many implications for understanding how platforms affect our experience of the world. Think about the recent hubbub over X (formerly Twitter), stemming from owner Elon Musk’s decision to remove messages from staff (and apparently others) who criticized him. On many platforms, moderators limit which type of posts are acceptable and which are not. The article demonstrates the core principles of a more-than-human netnography by illustrating how the agency of a platform is linked to the business models that perpetuate it. Platforms such as Reclame Aqui manifest the same tensions between network effects, effects shared with social media platforms and lateral exchange markets such as Tiktok, YouTube, Amazon, Uber and eBay. Additionally, this study sets the methodological stage for future research that may seek to analyze and theorize the affordances of particular platforms in facilitating or limiting different types of human behavior, including various types of empowerments.

From netnographies that look at pets and feral bunnies to those that examine robot nurses and platform usage, the examples above demonstrate how, by adopting a more-than-human approach, contemporary consumer and marketing research can move beyond its traditional human-centric focus and explore the complex entanglements of humans and nonhumans in shaping social phenomena. By accounting for complex technosocial and institutional elements such as affordances and technoculture, this approach expands beyond the realm of traditional research to encompass a digitally active world with a complex of players, one in which the agency of nonhuman actors activates and rapidly shapes social and cultural practices. In turn, such an approach promises to expand our understanding of the interconnectedness of humans and their natural, created, technological and even virtual environments. The approach also highlights the need for interdisciplinary research that brings together multiple perspectives and ways of knowing, to understand the complex interplay of humans and nonhumans in shaping social phenomena.

## CONCLUSION

For those who seek to keep up with recent developments in the world of netnography, this chapter provides a taste of the many changes that have occurred since the very early years of the technique, when it was used as a way to research forum-based online communities. Although much has changed about netnography, many beginning researchers still rely on its outdated procedural explication from these early times. Yet contemporary netnography has evolved into a highly sophisticated, well-structured and flexible research method to meet the challenges of new platforms like TikTok and Discord, new technological actors like AI chatbots, and novel online experiences such as the metaverse. Today’s netnography is a qualitative research technique that can be tailored to the needs of technocultural research on social media platform experiences and within virtual and augmented worlds.

Contemporary netnography is also finely attuned to developments in digital research ethics and the prevalent legal and institutional standards for the conduct of ethical research. The rapid evolution of digital technologies raises a range of important ethical questions for researchers, including those surrounding privacy, informed consent and data protection. The sophisticated approach to ethics that netnography provides (see Kozinets, 2020) is well-suited to address these challenges, as it provides a wealth of explanation, guidance and even a research ethics flowchart to help guide researchers on the collection, analysis and representation of research data in an ethical and responsible manner.

In conclusion, contemporary netnography is a constantly evolving and adaptive research method that has been providing researchers with a sophisticated and flexible set of tools for studying technocultures and digital experiences for over a quarter of a century. Its general structure, and its many sub-techniques, create adaptability that can be applied to many contexts. This flexible structure allows netnographers the degrees of freedom needed to adjust their practice to specific research questions and various elements of their context, making it a valuable tool for researchers in a wide range of fields. As digital technologies continue to evolve and offer new platforms, new technological actors and new challenges, netnography will continue to prove to be an adept and adaptable research technique, evolving to ensure that researchers in marketing and consumer researchers have access to an effective, trusted and responsible research method.

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## 18. Conducting consumer interviews online and offline

*Adele Gruen and Laetitia Mimoun*

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### INTRODUCTION

Interviewing is perhaps the most popular form of qualitative research. It relies on the prototypical human interaction of a conversation between two (or more) people. Three features differentiate an interview from a casual conversation: one person asks (most of) the questions while the other answers them; questions revolve around predetermined topics; and answers are recorded in some way. Interviews, therefore, are codified conversations with specific goals. In this chapter, we aim to understand what these codes are, what interviews can do and for what purpose. We will also discuss the challenges and opportunities associated with conducting interviews in the contemporary technological context. An abundance of books and articles address the specificities and steps of interviewing. While we refer to some of these, we focus on the most recent ethical and technological issues, and how they impact qualitative consumer research interviews. We wrote this chapter primarily for Masters and PhD students, and novices in qualitative consumer research. However, interviewing has evolved with new technologies and new challenges, so we also expect our account to be relevant for more experienced researchers looking to update their methodological knowledge.

### KEY ISSUES PERTAINING TO INTERVIEWING

This section addresses key points about interviewing consumers: why it matters, the main dangers and how to address them. This is an overview; we will come back to some of these issues later in the chapter in greater length (e.g. on ethics and reflexivity).

#### **The Importance of Doing Interviews**

Interviews give voice to consumers and allow them to provide their own interpretations of their behaviours and experiences. They help researchers to become grounded in the field by achieving emotional closeness to consumers. Researchers can choose among various interview types (e.g. phenomenological interview; discussed later), and integrate these with other methodologies such as ethnography and netnography. Interviews are often depicted as complementary to other forms of data collection. We will revisit this point later but assert now that interviews are perfectly acceptable and valid as the *only* data collection method for a research project. They give access to specific knowledge by revealing the meanings consumers ascribe to their actions. For example, in our study of consumers working from third places (Mimoun and Gruen, 2021), we interviewed coffee shop staff about their responses toward customers

working in the venue. We also interviewed customer-workers and built a comprehensive understanding of the meanings both actors ascribe to the practice of working from a café.

Interviews afford research participants opportunities to express opinions and views of a phenomenon, thereby shedding light on the construction of the significations attached to it (Thompson et al., 1994). Interviews give researchers access to consumers' perceptions of the world, beliefs and lived experiences (McCracken, 1988).

Finally, we wanted to reinforce the continued relevance of doing qualitative interviews in a context where new technologies and big data are increasingly available. Big data can generate massive amounts of information that can be analysed with computer-mediated technologies. Such data are very seductive: they are ubiquitous and immediate, and seem to provide direct access to people's behaviours (Edwards and Holland, 2020). In fact, they are also constructed by the affordances of the technology they rely on, and on the interpretation of researchers. The pervasiveness of these new types of data should not overshadow the relevance of doing qualitative interviews and being face-to-face with the consumers we are studying.

### **Understanding the Dangers of Interviewing**

The knowledge extracted during an interview is co-constructed by the interviewer and the interviewee(s). It is shaped by the form of the interview, the persons involved, the questions asked (as well as those not asked) and the context (e.g. in-person or online, location) (Brinkmann and Kvale, 2018). Therefore, while interviewing can be a very powerful and relevant data collection tool, it requires careful planning and consideration.

First, interviewing is a social experience grounded in a specific social milieu. A researcher's position is never neutral, nor is the context of the interview. A novice researcher might jump into the field without taking the time to reflect on their own position and what it implies for the production of knowledge. This impulsiveness could be dangerous, as the data might be misconstrued. Thus, adopting a reflexive position is key. The research team must stop and discuss the dynamics at play, including those related to gender, race, social class and economic background. Acknowledging intersectionality is crucial to understand such power differentials. Researchers can refer to Arsel et al.'s (2022) curatorial article exploring diversity, equity and inclusion for guidance. Understanding these sociocultural and power dynamics can generate insights into the presence or lack of shared relational norms and implicit knowledge, potential barriers to self-disclosure, and the interviewee's possible vulnerabilities. Never accept the results of the interview as purely objective knowledge or direct access to what consumers truly think. Because interviews happen in context, interviewees might be influenced by the researchers' position or perform a role, consciously or not (Atkinson and Silverman, 1997). In our experience, interviews with students are, for example, fraught with such issues (e.g. anxiety about grades being impacted if they do not provide a desired response).

### **Interview Safeguards**

Thankfully, there are many ways researchers can circumvent these potential threats. First, they can attend methodological training. Alternatively, they can spend dedicated time with an experienced researcher/interviewer. It would be dangerous for novice researchers to jump into fieldwork first-hand: the data collected will be impaired by limited experience and, likely, the theoretical knowledge extracted will be compromised. Second, as already mentioned

above, researchers can spend time reflexively questioning their roles and positions vis-à-vis the project. Third, to ensure the robustness of their interpretation, they might engage in triangulation – either across researchers (e.g. conducting several interviews each), sources (e.g. collecting interviews with both consumers and experts) and/or methods (e.g. complementing interviews with observation). Triangulation of methods, achieved by using such techniques as projectives or *in situ* observation before, during or after the interview can bolster the robustness of the findings. For example, when interviewing consumers about their car-sharing practices, Gruen (2017) asked some participants to take her for a ride and demonstrate all the steps to book a car on the app and pick it up.

## CHOOSING THE RIGHT TYPE OF INTERVIEW

The way an interview is conducted, its content and the type of knowledge sought may vary. Table 18.1 presents a (non-exhaustive) list of forms that qualitative interviewing can take, as well as the various types of knowledge each can produce. We provide examples from consumer research articles for most types of interviewing, focusing on the types mostly used in consumer culture research.

The choice of type of interview and content will have important consequences for the nature of the data collected and the type of knowledge extracted. Note that knowledge is co-constructed regardless of the nature of the interview, but that the balance of influences in shaping the knowledge produced can vary. If interviews are too structured, they will only glean data about themes reflected in the interview guide.

Semi-structured interviews are the most common approach: they combine efficiency by using pre-set questions and some degree of serendipity by giving the interviewer leeway to deviate from the guide. There is value in allowing participants to develop a point about something not included in the guide. This is even more the case in expert, conceptual, or reflective interviews.

Sometimes, the context of study will force the researcher into using a specific type of interview. For example, an ethnographic approach might find the researcher in a situation where participants cannot take the time to do a formal interview (Woermann and Rokka, 2015). In such cases, ethnographic interviews might be necessary. In other cases, technologies might limit the options. For example, if researchers can only conduct online interviews, they should consider whether their participants will be able to engage in long, biographical or narrative interviews (think Zoom fatigue).

Finally, there is the question of how many interviews are enough. At the risk of not being original: ideally, the researcher should stop when they reach theoretical saturation. When extra interviews are not bringing any novel insights, that is a sign that enough data has been gleaned. In practice, other considerations can get in the way, such as having only enough funding for 20 participants. In such cases, researchers must anticipate whether saturation will be achievable with that many interviews. A large number of participants is not always necessary: when conducting ethnography, it is easier to build a deeper connection to a smaller number of participants (Crouch and McKenzie, 2006).

*Table 18.1 Types of interviews*

Different Forms of Qualitative Interviewing			
Type	Definition	Methodological references	Consumer research example
Biographical interview	Generates a narrated reconstruction of the participants' life story, temporally and thematically linking salient events	Rosenthal, 1993	Boost and Meier, 2017
Conceptual interview	Seeks the production of knowledge by assuming the expertise of the participants	Brinkmann, 2007	
Discursive interview	Aims to elicit and reconstruct collective representations	Ullrich, 2022	Peñaloza, 2000
Ethnographic interview	Short, <i>in situ</i> and impromptu conversations that take place within the constraints of the field site	Arsel, 2017; Spradley, 1979	Maciel and Wallendorf, 2017; Woermann and Rokka, 2015
Group interview	Generates the collective perspective of a social unit (e.g. family)	Barbour, 2018	Echeverri and Skålén, 2011; Epp et al., 2014
Long interview	Seeks to efficiently gain a deep understanding of participants' lived experiences and worldviews and the meanings behind these	McCracken, 1988	Mimoun and Bardhi, 2022; Russell and Schau, 2014
Narrative interview	Elicits stories by focusing on human actions and critical incidents	Lawlor, 2000	Holt, 2002
Photo-elicitation or visual research	Elicits stories by asking participants to take photos and discuss them in the interview	Heisley and Levy, 1991	Dion et al., 2014
Reflective interview	Asks participants to self-consciously recall and reflect on past experiences	Giesler and Thompson, 2016	Bolat and O'Sullivan, 2017
Semi-structured interview	Using a topic/thematic interview guide	Kvale and Brinkmann, 2015	Drenten et al., 2023; Mimoun and Gruen, 2021
Unstructured interview	The interviewer is mainly a listener and can use probes or conversational probing. No prepared guide or questions	Burgess, 1982	Tumbat and Belk, 2011; Alvarez et al., 2021

## CONDUCTING INTERVIEWS

Once researchers have figured out which type of interview to conduct, they must reflect on how to go about doing them. This preparation phase takes time. For instance, we often underestimate how long it takes to recruit participants. Exhaustive lists exist to help with interview planning (e.g. Brinkmann and Kvale, 2018; Knott et al., 2022); here we aim to offer key tips to conduct high-quality consumer interviews.

## Planning Interviews

Writing an interview guide takes time. We recommend researchers draft and review their guides long before starting to recruit participants, as they will likely need to attach it to their ethical review application (discussed below). Researchers should expect interview questions to evolve with each interview, as these merely serve as a topic guide that will ‘form the basis of the discussion’ (Knott et al., 2022, 2). The questions need to allow for such discussion to flow. For instance, researchers should avoid closed-ended questions, and if necessary, add reminders to probe by asking participants to elaborate or provide examples. Researchers should regard the interview guide as a dynamic document, taking notes during interviews about ways to better formulate, rearrange or ask new questions.

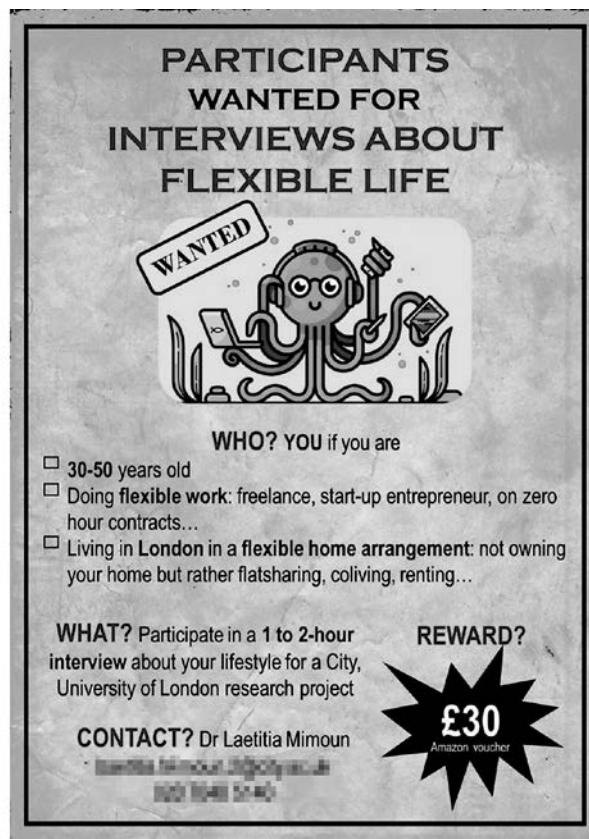
With regard to structuring an interview guide, we recommend that questions be organised around three to six themes with a clear evolution. Researchers should begin with questions that are more factual or descriptive, which participants will find easy to answer (Arsel, 2017). This approach will put them at ease, allowing them to settle into the discussion. Interviews should never commence with abstract, emotional or cognitively demanding questions. Knott and colleagues (2022) offer a depiction of the interview guide as a ‘topic arc’, (3) where questions progress from being descriptive to asking about the participant’s feelings. Even for research that focuses on emotions *per se*, building initial rapport is crucial, and can be helped by progressive questioning. Toward the end of the interview, it is good practice to ask open questions such as ‘Is there anything that comes to mind about this topic that we have not discussed?’ Often, this question will yield insights about new questions that researchers should include on subsequent versions of the guide.

Regardless of the sampling method (e.g. purposeful, snowball, probabilistic sampling), it will likely take more time than anticipated to find the ideal number of participants. Sometimes, the researcher will need to access a specific field before contacting participants. For instance, to interview people working in a coworking space, we relied on a friend who worked there as a key informant: she invited us to visit and introduced us to the managers and other coworkers (Gruen and Bardhi, 2018). Once we gained access, it was easier to interview coworkers. One way to recruit informants is to design eye-catching materials such as leaflets to attract participants. Figure 18.1 provides a good example of a visually attractive leaflet we produced for our project on chronic consumer liminality (Mimoun and Bardhi, 2022). Note how the title remains evasive about the theory, while allowing participants to understand whether they qualify.

When participants have agreed to be interviewed, researchers and participants must decide where it will occur. We recommend asking participants where they will be the most comfortable. Asking them to travel across town will likely put them off, so it will be the researcher’s responsibility to move closer to them. In a naturalistic enquiry, the location sorts itself out, as interviews are attached to a field. Otherwise, look for relatively quiet (for good-quality recordings) and public places. These ensure researcher/participant safety and put both at ease (consider gender dynamics, for instance). The place where the interview takes place will influence how the interview unfolds. For example, comments about the location likely will be the first point of discussion (e.g. ‘What a lovely café’; ‘Have you been here before?’). Finally, a recording device and a notepad (digital or otherwise!) are required interview elements.

## CONDUCTING INTERVIEWS

Interviewing is not simply about reading prepared questions and probing. It is a human-to-human experience where feelings, emotions, awkwardness and uneasiness are common. Interviewing someone about their consumption patterns may even turn out to be an existential matter. We recommend reading Schouten's reflection, 'My Improbable Profession', on this topic (2014). Though a fiction piece, it accurately depicts the unintended consequences of interviewing consumers. In addition to existential issues, the content of interviews may be laden with emotions. For instance, in our study on coworking (Gruen and Bardhi, 2018), when asked about her motivations to join a coworking space, one respondent began to discuss her father's death and how it prompted her to change her life. She became teary, and so did the interviewer. We took a minute, had tea (after all, this was in the UK), and resumed. The interview turned out to be very fruitful, as the participant became very genuine in her responses after this event.



*Source:* Mimoun and Bardhi, 2022.

*Figure 18.1 Recruitment material*

This example shows the importance of conveying empathy to participants. Conducting good interviews implies building an authentic human rapport. There are many steps interviewers can take when planning and preparing for their time with participants. For instance, Arsel (2017) reflects on using the word ‘why’ as a probe, noting that it forces consumers to justify their behaviour and may appear confrontational. Using softer probes such as ‘Can you elaborate?’ or ‘Can you tell me more?’ is a nicer tactic to probe the ‘why’ of behaviour. Further, participants may need time to answer the researcher’s questions. The researcher must be comfortable with silence, a powerful probe in itself. To understand the power of silence, novice researchers should try being interviewed by their colleagues or fellow doctoral students in need to test their interview guides. As they experience the other side, researchers will understand how sometimes, to answer a simple question, it takes a minute or two to gather one’s thoughts. To respect the time a participant needs to answer, and to demonstrate their comfort with silence, researchers could count in their heads (say, to five or even 10). At that point, if the participant has not responded, the researcher could include a gentle probe such as ‘does anything come to mind?’ Further, at the end of the interview, we recommend that researchers leave the recording device on when they ask participants if there is anything else they want to discuss. Pausing and allowing interviewees some time to reflect on this final question is beneficial. Usually, participants seem to relax once the ‘official’ questions are over.

Finally, researchers definitely should remember to bring a notepad to interviews, to make notes during and after about the interview setting, the interviewee, their answers, nonverbal communication (e.g. body movements, facial expressions), emotions and anything else that seems relevant to the discussion. These notes comprise text for the study, and analysing them can foster deeper interpretation.

## CONDUCTING INTERVIEWS ONLINE

The ways of conducting interviews have evolved alongside technological advances. New possibilities emerged after the good old pen and paper technique when digital recorders were introduced. Interviews also occur by phone, video and now through chatting or voice-recording (Edwards and Holland, 2020). Below we review what digital technologies afford researchers when conducting interviews.

### Efficiency

The primary advantage of digital technologies is their capacity to allow researchers to acquire text from a distance. Skype, Microsoft Teams and Zoom are helpful tools to overcome geographical distance. They enable researchers to conduct interviews with consumers situated in different countries or regions, saving the cost of travelling. Tools that allow for automatic transcription, such as Microsoft Teams, are particularly useful. Furthermore, digital technologies allow researchers to reduce the temporal demands on both parties. For instance, online interviews might last an hour, but they do not require time to travel to the interview location, break the ice, get coffee if need be, and so on. Time-saving can be particularly important when conducting interviews across time zones, when participants are located all over the world, and when researchers would like to conduct multiple or follow-up interviews with participants.

## **Empowering Participants**

Digital technologies can help reach consumers who may not be available for what researchers perceive to be a full interview time slot. For instance, stay-at-home parents with multiple young children, people with chronic conditions, and those who are always on the move might not have the capacity to dedicate the amount of time the researcher desires to sit down and chat. In those cases, asynchronous digital technologies that involve voice or text messages (e.g. via WhatsApp or other messaging platforms) or even emails that enable longer answers than these technologies, may be practical. Leveraging these resources can also be beneficial in addressing generational or other divides.

Gibson (2022) provides an interesting reflection on doing interviews with young people using WhatsApp. She reveals a form of interviewing where the researcher loses control over how the interview is done – for instance, she finds participants move in and out of the conversation over days. Her participants often welcomed the possibility to pause and think over questions while tending to other tasks, before returning to their phones to text their responses. Gibson admits the resulting interview transcript is shorter than that of a classical interview. Despite this, she finds this flipping of the power balance between researcher and participant very insightful, explaining that: ‘each response from a participant seemed to be dense with meaning’ (623). Sharifonnasabi and colleagues (2024) also used this approach when collecting diaries from consumers who commute internationally. They asked informants to send WhatsApp voice notes as they planned and executed their travels. Even these short voice notes allowed the researchers to collect real-time, extensively detailed descriptions of behaviours, thoughts and emotions as informants booked tickets, packed their suitcases and crossed borders.

## **Enhancing the Data**

Synchronous technologies will, similarly to in-person interviews, afford conversation flow, spontaneity and some form of nonverbal communication (see Table 18.2). These platforms also allow the researcher and participant to share materials. For instance, in a study of consumers’ social media habits, participants can share their screens with the researcher. This activity enables the recording of the consumers’ digital practices in real time – capturing which websites they navigate, their activities on these websites, and the meanings they ascribe to their actions. Simultaneously and effortlessly, online interviewing platforms record the activity on the shared screen, the faces of consumers and conversations (many platforms offer automatic transcription). Hence, the resulting data can be very rich in comparison to in-person interviews with only an audio recording. Such affordances are still underexplored in consumer research. For instance, Mardon et al. (2023) rely on participants recounting their interactions with digital technologies and their own ethnographic notes from observing their behaviour with these technologies. While these methods are valid and allow for rich interpretive data, future research could consider capturing digital practices through recording real-time behaviour via screen sharing.

**Table 18.2 Comparing asynchronous online, synchronous online, and in-person interviews**

	Asynchronous Online (e.g. WhatsApp)	Synchronous Online (e.g. Skype)	In-Person
Geographical boundaries	None Researchers and participants are in control of where they are		Constrained by interview location
Temporal boundaries	None Participants are in control of the interview temporality	Constrained by interview length	Constrained by interview length
Atmosphere	Co-presence		Presence
Technical equipment	Encrypted messaging platforms on both sides	Video-conferencing platform	Recording device (e.g. smartphone)
Speed of response	Participants are in control of the speed of response; allows for reflection	Spontaneous	
Type of data	Text Voice messages Pictures, video, links sharing	Oral, visual and some nonverbal cues Pictures, videos, links sharing	Oral, visual and nonverbal cues Atmospherics
Limits	No visual cues or researcher presence Data privacy Length	Privacy concerns Technical issues (e.g. 'freeze') 'Zoom fatigue'	Less multimedia
Costs	Low	Relatively low (e.g. platform access)	High

Source: Adapted from O'Connor et al. (2008).

### Rethinking the Relationship Between Consumers and Researcher

Online interviewing may be depicted as creating a *de facto* distance between participants and researchers who interact only through technology. However, we view this perspective as slightly outdated. During the COVID-19 pandemic, qualitative researchers worldwide became acquainted with conducting interviews online via various platforms. This prompted an outpouring about their experiences, and revealed how new forms of intimacy emerged between researchers and interviewees. Wahl-Jorgensen (2021), for instance, discusses how comfortable participants seemed when being interviewed in their own homes (she also highlights the comfort it brings to researchers to conduct them from their homes!). Under a cosy blanket, with a cup of tea and their pets around, consumers might feel more at ease to discuss personal issues. Maddox (2021) speaks of a real-time co-presence afforded by technologies. Consumers can also take the researchers on tours, showing them a specific product they mention or a place in their home they are discussing. But instead of having to invite the researcher into their home, they can control what they choose to reveal of their interior.

Wahl-Jorgensen (2021) also describes a situation where she interviewed someone staying at a homeless shelter. This person felt insecure about their place, and the option to blur their background on Zoom was crucial to grant them agency and control. Building rapport can

be complicated by interviewees' refusal to choose the 'video on' option. We suggest the researcher explain the importance of seeing participants' faces to foster connections, but also leaving them the option to turn on the videos at a later time when they feel comfortable. Sometimes the sense of anonymity and distance rooted in not seeing each other can lessen the participant's perception of being judged and make it easier for them to confide in the researcher about particularly intimate or sensitive topics.

## ETHICAL INTERVIEWING

Most universities now require that researchers submit a research review application to an ethics committee (e.g. institutional review board). Researchers should take this opportunity to identify all the possible aspects of the study that could cause ethical concerns. It is crucial to address each issue thoroughly. If in doubt, it would be useful to ask an ethics officer mentor for advice before submitting the form. Here are some key issues researchers will need to consider:

- *Privacy and Confidentiality.* How will participants' privacy and anonymity be protected? Using pseudonyms in interviews is very common. However, when it is not possible to preserve anonymity fully (e.g. life or biographical interviews), researchers must inform participants of that fact.
- *Consent.* Informed consent is too often seen as a tick-box exercise. However, as the interview unfolds, the researcher may want to consider consent as a process – seeking continuous consent from participants as the project progresses (and definitely if topics of a sensitive nature arise in discussion). During a research project on co-homing (when the home is turned into a coworking space for a day), we conducted interviews at participants' homes (Gruen and Mimoun, 2019). We used continuous consent throughout the interview (e.g. 'Is it ok if I now ask about how your children feel about this?') and the home tour (e.g. 'Can I also take pictures of your bedroom?'). In ethnographic interviews, it might be difficult to record written consent each time a casual chat occurs. Researchers should always reaffirm their positions to avoid ethical issues. Online, some concerns may arise about not being able to get a signed sheet of paper from the participants; signed electronic forms are acceptable (Gibson, 2022).
- *Emotional Harm.* Earlier, we mention how interviews can become emotional; in fact, they can offer both emotional healing and lead to emotional harm. Researchers whose interviews are likely to raise emotional issues must ensure to engage in training to understand how to react should a participant become upset or distressed. Moreover, it is important to consider the impact of emotionally potent interviews on the mental health of both the participant and researcher.
- *Power Dynamics.* Interviews always involve some form of power dynamics due to the duality of their structure. Reflect on these dynamics and what is at play between the researcher and the participant (e.g. issues of status, gender, race, class, etc.).
- *Vulnerable Consumers/Groups.* Conducting research with vulnerable consumers (e.g. patients; children), requires researchers to provide further evidence that the project will

follow clear ethical guidelines and steps (see Kerrane and Hogg, 2013). We recommend seeking specific training to conduct interviews with such cohorts. Care should also be given to accessibility considerations; for example, the chat option can be helpful to participants with a hearing disability. Likewise, researchers should plan ways to reach participants who have difficulty accessing the technology needed for online interviews (either for economic reasons and/or accessibility).

- *Data Management.* Digital data, like any data, are subject to hacking and data loss (Ovide, 2022). Thus, researchers should use encrypted platforms for asynchronous interviewing (e.g. WhatsApp or Signal over Messenger). Data storage, reusing and destruction must be planned and explained to participants. In Europe, following GDPR policies in such matters is a legal obligation.

In addition to the above, some ethical concerns are specific to online interviewing. More so than with in-person interviews, online interviewers need to protect their own and their participants' privacy. Gibson (2022), for instance, recalls how some asynchronous WhatsApp interviews lasted for days, with the participants and researchers pausing in the chat to do other things. These prolonged encounters may be draining for the researcher who cannot fully clock out from them. Likewise, online video interviews expose the researcher more than other forms, pressuring researchers to curate their home environment for work purposes. In such cases, they can use digital backgrounds. Other issues – e.g. the added stress of seeing one's image and self-representation (Kirk and Rifkin, 2020) and a whole host of possible technical difficulties are salient to the online interview environment. These elements can lead to 'Zoom fatigue' on both sides.

Finally, we note the issue of the researcher not being physically present for consumers in case of distress. If interviews trigger consumers' emotions, the researcher's physical presence can reassure participants and provide an empathetic presence. However, researchers can also provide the necessary comfort at a distance – by offering participants to take a break, or asking if they have friends or family they can talk to. In such cases, it is a good idea to leverage the affordance of co-present digital technologies by proposing that participants leave the call 'on' while they prepare themselves tea. These actions allow for a break in the interview, but also facilitates casual chitchat and ensures an upset participant is not left alone.

## CONCLUSION

We hope this chapter provides a guide (although not an exhaustive one) for interviewing consumers. We focus on the trade-offs between in-person interviews, synchronous online interviews and asynchronous online interviews. We hope that whichever interview format(s) the researcher selects yield an abundance of insightful, intriguing and interpretable text.

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## 19. Collective close reading (CCR) as a method for interpreting cultural text

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### INTRODUCTION

Industries rooted in entertainment and information dissemination invest billions annually to produce ‘cultural texts’ – mass-marketed products (and often full-fledged brands) rooted in narrative forms that are designed to entertain, edify or persuade. But what makes these texts compelling to their creators and consumers? We aver that both their producers and the academics who study their semiotic and symbolic substance (e.g. Brown et al., 2013; Russell and Schau, 2014; Schau et al., 2009) would benefit from answers to this question. To approach this goal, this chapter explores the contributions and challenges of an analytical technique that we label ‘collective close reading’ (hereafter CCR), one we suggest researchers can leverage to explore cultural texts, and their attendant successes or failures as products or brands. We aver that CCR is distinct from the more familiar technique of close reading, in that it explicitly recognizes and interprets the plurality of meanings that emerge when a research team analyses cultural texts. Thus, at its core, CCR mirrors the polysemy that characterizes cultural texts in general (Brown, 2006b; Fiske, 1986).

CCR does not advocate a dominant interpretation by a single scholar. Rather, the technique resonates with how cultural texts live and evolve in the world (e.g. Barthes, 1977/2016; Eco, 1981). By performing and representing a plurality of divergent, sometimes competing interpretations, CCR enables collective, multilayered and mutable sensemaking. As such, this approach emphasizes the multiple meanings and ambiguous aspects of texts, and importantly, sheds light on why certain texts achieve enduring resonance with audiences.

To ground our discussion of CCR, we first review the close read as it originated in literary criticism, and the ways marketing scholars have relied upon it. To demonstrate the benefits of our method, we describe how we engaged in CCR when exploring the research question of why Daphne du Maurier’s 1938 novel *Rebecca* remains compelling to consumers and producers alike. We conclude by discussing the benefits and challenges research teams might encounter when using CCR, and suggest how it might add value to the study of a range of commercial and cultural textual products.

### THE CLOSE READ AS RESEARCH TECHNIQUE

Since the 1920s, close reading has occupied a central position in Anglo-American literary criticism (Smith, 2016). Although the practice originated in classical Greek rhetorical analysis, it is most often associated with the New Criticism movement within literary theory. New Critics coined the term to indicate a more technically informed analysis of writings. According to Showalter (2002, 98), close reading is ‘slow reading, a deliberate attempt to detach ourselves

from the magical power of storytelling and pay attention to language, imagery, allusion, intertextuality, syntax, and form'.

Close reading techniques focus not only on how a particular text is structured, but also on how rhetorical devices and cultural references convey meaning. The process of close reading thus involves engaging deeply with a text and identifying patterns as well as any repetitions, contradictions or similarities that pervade it. A key skill is asking how and why questions inherent in the construction and meaning of the text, together with noting underpinning cultural references and intertextual allusions. Overall, close reading requires a dynamic deconstruction of the text, and constantly unpacks what readers may otherwise take for granted.

Close reading is sometimes criticized on the grounds that its micro-focus can lose sight of the bigger picture – that is, of the wider historical, social and political aspects of a work. In addition, because the derived meaning stems from one reader's personalized interpretation, critics argue it is important that interpreters detach themselves from a subjective interpretation and reflect on potentially broader and shared meanings (Smith, 2016).

Indeed, the most impactful works that apply close readings of literary texts are those contributing observations that apply beyond the specifics of a single text. William Empson, for example, one of the most influential New Critics, famously identified seven types of ambiguity from his close readings of a diverse range of poetic texts (Norris, 2014). Likewise, T.S. Eliot's influential *Sacred Wood* (1920) deploys close reading to make broad critical pronouncements on the work of various authors in the literary canon.

A fast-forward to the present finds close reading still widely used by scholars of literature to offer insights into many cultural phenomena. These include: the 'Urban Gothic', a concept derived from Victorian literature with a focus on the London cityscapes contained therein (Ridenhour, 2012); gendered landscapes, as highlighted in realist nineteenth-century novels (Henson, 2013); and misogyny in South Africa revealed through a feminist literary analysis of crime fiction (Murray, 2016).

In part because of its potential to create broad insights, close reading enjoys popularity beyond literary studies. Indeed, an array of disciplines including law, politics, geography, history, education and media/cultural studies rely upon close reading to offer insights into key texts and topics, and into discourses that pervade society at large. Because cultural texts such as novels, films, plays, podcasts and other new media forms are so pervasive and profitable, close reading has been central to analyses of consumer-cultural texts in the fields of marketing and consumer research. As such, we next review how marketing scholars have deployed close reading.

## CLOSE READING IN MARKETING

Reading and researching consumer-cultural texts has a long history (Featherstone, 1990; Fiske, 2017). Just as literary texts are constructed from a variety of components (e.g. words, form, content, meter, allusions), so too are goods, services and representations designed and destined for consumption. Indeed, consumer researchers have theorized the production and consumption of advertisements, product packaging, brands, films, books and consumer experiences as texts, subjecting these to close-reading techniques to understand their meanings and appeal (Scott, 1994; Stern, 1996).

Close reading in marketing is often applied in tandem with a variety of literary and social theories. To understand the meanings and appeal of ads, for example, both Linda Scott and Barbara Stern apply reader-response theory as advocates for contextualized readings of market texts. In so doing, Stern affirms that making sense of texts such as ads ‘is anchored by the text at one endpoint and by the reader at the other’ (1993, 557). In other words, cultural texts such as ads and brands are autonomous from authors and audiences. Hence, according to Scott, there is ‘no final word on the “right way” to read the text’ (1994, 463).

By exploring intended as well as potential meanings, consumer research has moved beyond exploring what texts like brands mean, instead probing what these texts are capable of conveying. As an example, Stern’s (2006) close reading of Camel’s cigarette advertisements tracks the sociohistorical context of this text and the development of the brand character ‘Joe Camel’. By tracing the meanings of the name ‘Joe’ in Judaeo-Christian and modern American traditions, Stern reveals the character’s gendered ambiguity. Likewise, she traces the symbolic meanings of the camel in Greco-Roman fables, Indian mythology, Medieval allegories, bestiaries and visual arts to identify and explore the cultural binaries that linger around this text.

A particular characteristic of close reading of marketing texts is the potential to reveal divergences, absences, and convoluted meanings that subvert simple or given meanings. As Stephen Brown (2005) points out, such qualities can contribute to the powerful appeal of specific brands. Through close reads of novels germane to advertising and to other cultural intermediaries who produce texts, Brown investigates the layers of incompatible meanings by which a product or brand can satisfy oppositional desires simultaneously. Brown explains that this ‘paradessence’ – short for ‘paradoxical essence’ (Shakar, 2002) – is core to the star quality of certain products. For example, during the 1990s, Häagen-Dazs ice cream simultaneously positioned itself as paradoxically innocent and sexy.

Consumer research has continued to leverage close reading as a technique to illuminate a variety of topics through the interpretation of marketplace texts. For instance, Brownlie and Hewer (2007) use close reading of culinary texts to reveal ideological underpinnings of markets, and how subject positions are constructed through these texts. Godfrey and Lilley (2009) apply close reading to understand how collective memories are formed through consumer-cultural texts. Zwick and Bradshaw (2016) provide close readings of consulting literature to reveal contradictions in capitalist culture and praxis. Canniford and Hough-Snee (2018) apply the technique to surfing films to show how oppositional stakeholders layer attractive and repulsive affect onto consumer cultural texts. Bradshaw and Brown (2018) read J.G. Ballard’s novels under the influence of antipsychiatry theory to understand the interplay of urban space, consumer society and human experience. In all cases, close reading offers a means for marketing scholars to illuminate multiplicities of meanings within commercial texts, the ways readers can take these texts in different directions, or the ways texts can direct their readers.

## READING PLURIVALENT TEXTS

Despite the usefulness and validity of close readings, the ways they are executed often remain obscure. What motivations, for instance, determine the direction in which a read proceeds? In making interpretations and connections, Scott (1994, 463) suggests close readings should not

be ‘completely idiosyncratic’, and that intended authorial meanings should be recognized and respected. This assertion implies the researcher must consider issues of responsibility, power and the ownership of meaning during close reading.

Holbrook and O’Shaughnessy (1988, 400) go further in asserting the responsibility and authority of the researcher, explaining that as much as interpretive research relies on close textual readings, ‘dialogue between reader and text proceeds … towards its own correction in the direction of increasing validity’. Indeed, they admit ‘the reader does not report each cycle of this interpretive process … Rather, for purposes of exposition, the reader tends to discuss the final interpretation chosen from among various competing interpretations provided by a close reading’ (1988, 400–1).

The result of this process is that successive close readings are shaped by research aims, questions, theoretical lenses and researchers’ positionalities – not to mention the demands of review teams and journal conversations – all of which can obscure the disagreement and plurivalence that underlies many representational endeavours. In the next section, we offer a transparent example of how our research team applied CCR in interpreting an enduring cultural text, and how we accommodated both our individual interpretive leanings and discovered common ground to produce an enriched collective interpretation.

As with prior close reads, we remain sensitive to the stylistic features of texts, as well as to interpretations of how plural meanings are constructed, challenged and captured over time by marketers, consumers and increasingly nonhuman mediators of markets, such as algorithms. In addition, we seek to accommodate the broad levels of interpretation and contextualization made possible when teams of authors conduct close readings. We aver that compared to solo-close reads, the team version can enable interpretations that move fluidly in different directions. Moreover, we seek to show how team-based approaches offer a transparency of method through which researchers can probe and reflect on the ways close reads develop during research. This is a useful methodological feature, particularly given that different audiences often enter the same marketing-based texts but may exit with vastly different interpretations. We now turn to our close reading of the novel *Rebecca* to explain the technique of CCR.

## THE COLLECTIVE CLOSE READ AS RESEARCH TECHNIQUE

To explain the steps involved in the process of CCR, we build upon Brown’s (2005) observation that novels are a rich vein for scholars interested in exploring consumer culture. We chose Daphne du Maurier’s gothic novel *Rebecca* (1938/2020), which we will assert is an ideal choice to explore what makes cultural texts compelling and enduring to both marketers and consumers. *Rebecca* is a first-person account by the ‘raw as an egg’ young bride (Laing, 2018, n.p.) of her marriage to Maxim de Winter, a mysterious man twice her age and the scion of Manderley, his aristocratic estate in Cornwall. His first wife, Rebecca, whose presence casts an increasingly ominous and oppressive shadow over the new marriage and life at Manderley, had died 10 months before. The plot reflects the naïve (and never-named) narrator’s increasing anxiety over her conviction that Maxim will only ever love Rebecca, and that her own marriage will be a failure.

*Rebecca*’s commercial history demonstrates that it not only has remained a compelling cultural text since it was first sold in 1938, but it has established itself as an enduring and

adaptable brand. Since its initial publication, it has never been out of print, has appeared in 25 languages, and still sells approximately 4,000 copies a month (Laing, 2018). In 2017, customers of the W.H. Smith bookstore chain named it Britain's favourite novel, over the likes of classics such as *Pride and Prejudice* and *Jane Eyre* (Onwuemezi, 2017). The 1940 film version garnered Alfred Hitchcock his only Academy Award for Best Picture, and the novel has spawned a prequel, a sequel (Beauman, 2013; Hill, 1993), both musical and non-musical theatrical productions, and at least 10 television versions (including a 2020 Netflix film). After the continued success in Europe (where it has been staged in 12 different languages), the English-language musical version of *Rebecca* debuted in London's West End in September 2023 (Cashell, 2022).

*Rebecca*'s brand extensions are not limited to the adaptations of the novel: among the several tours that plumb the linkages between the novel and the Cornwall region of England, in August 2023, authors and podcasters Dana Schwartz and Vanessa Zoltan led a four-day 'pilgrimage' to that area. The itinerary included daily walks of up to 12 miles in the countryside, as well as participants engaging in reading and discussing the novel (<https://www.readingandwalkingwith.com/rebecca-august-2023>). In addition, the official Daphne du Maurier website ([www.dumaurier.org](http://www.dumaurier.org)) describes myriad ways devotees of du Maurier's works can engage with the text and its extensions, such as the Fowey Festival, an annual literary event originally focused solely on du Maurier's works. Myriad online merchants such as [amazon.com](http://amazon.com) and [etsy.com](http://etsy.com) offer variations of *Rebecca* 'litcore' – merchandise related to reading and publishing (Demopoulos, 2023) – much of which is emblazoned with the famous first line of the novel, 'Last night I dreamt I went to Manderley again.'

The commercial and cultural endurance of *Rebecca* is especially noteworthy, given that the gothic-literature genre in which it is emplaced is often dismissed as largely forgettable and unliterary (Summers, 2016). Yet the novel is not universally admired, and has been viewed as controversial for being both antifeminist (Meyers, 2001) and man-hating (Wisker, 2003). As such, it harbours the plurivalence and paradox often inherent in compelling cultural texts (Brown, 2005).

## ANALYSING REBECCA WITH CCR

In this section, we highlight the five steps we followed when completing our CCR. Our research team resides in three different countries, and we began this work during the COVID pandemic; thus, all of our joint work took place over Zoom calls.

### **Step 1: Individual Intertextuality Audit/Discussion**

In our first team discussion, we assessed the potential of *Rebecca* as a focal cultural text and collectively reviewed the fundamental building blocks of any novel that we would analyse – e.g. its plot, characters and settings. Prior to reading the novel either for the first (Robin) or subsequent (Cele and Pauline) times, we began by writing up what we believed would be our own individual characteristics and experiences that could shape our reading of the novel, in line with standard qualitative reflexivity procedures (Berger, 2015). Table 19.1 summarizes these influences; they range from demographic categories (e.g. age, gender, nationality) to our

own research lenses and personal interests. Including a team member who is both male and unfamiliar with the novel was a deliberate choice, because we wanted to include a fresh interpretation of a text that is typically understood to be directed at a feminine reading audience (Hermes, 2008).

### **Step 2: Individual Reading/Note Taking**

Next, we each read the novel on our own, taking notes that pinpointed the literary devices and language we believed contributed to *Rebecca*'s literary longevity as a cultural text. As expected, our individual reading styles and tastes shaped our stances on the salience of these elements. For example, Cele has always admired the vivid writing in *Rebecca*, and how it contributes to its Gothic overtones – beginning with the novel's opening haunting and somewhat sinister description of the protagonist's dream of revisiting Manderley. She further reflected on how her initial read in her twenties was more sympathetic toward the bride (when they were similar in age), where her middle-aged interpretation of the novel resonates with the impatience the other characters display with the bride's tendencies toward self-pity and unassertiveness.

In contrast, Pauline had always found the novel's Gothic elements particularly evocative in terms of the visceral suspense she experienced every time she has read the novel or viewed the TV/film versions. Although admiring the female gothic style in which du Maurier (along with Charlotte Bronte and Jane Eyre) excels, Pauline too found she had become less sympathetic towards the female protagonist and her lack of agency since first reading the novel.

Robin was more impressed with the ways the novel presents the paradoxical presence and absence of the unseen character Rebecca, who manifests in myriad strange ways. Noting the role of place and of objects, he was struck with how, even in death, Rebecca exerts a gravitational pull over possessions, people and landscapes, creating and locating an atmosphere throughout the novel.

### **Step 3: Abstracting**

After completing our individual readings, we then exchanged a series of emails where we shared our preliminary perceptions of the textual elements contributing to *Rebecca*'s commercial and cultural caché. We discussed how the elements could be classifiable as either micro- or macro-level. We defined macro-elements as those tapping into or referencing broader aspects of culture (e.g. the British class system, descriptions of Cornwall), and micro-elements as those rooted in du Maurier's literary devices in the novel (e.g. language, repeated motifs). Similar to the coding procedures used when engaging in thematic analysis of interview text, we refined our individual emergent raw codes by classifying them into these higher-level two categories.

### **Step 4: Memoing and Negotiating**

In our fourth step, we shared our individual macro and micro codes via email prior to an online meeting, where we then discussed their similarities and differences. In so doing, we negotiated a final set of codes that we believed best illuminated the elements of *Rebecca* that fortified its status as a compelling cultural text. No wide disparities emerged regarding our macro/micro

*Table 19.1 The research team's individual characteristics and intertextual influences*

Team Member	Nationality	Gender	Previous Familiarity with <i>Rebecca</i>	Research Interests Relevant to <i>Rebecca</i>	Familiarity with Setting (Cornwall)	Consumption Experience(s) with <i>Rebecca</i>	Evolving Interpretations of the Novel	Experience/Proclivities Shaping Interpretation of Text	'To me (and at this point in my life), <i>Rebecca</i> is about...'
Cele	US	Female	High (had read several times/seen TV and film versions)	Decadence; British heritage	Never visited	Regards as prior to writing this chapter	When younger, did not grasp ambiguities of good/evil sequel, followed news stories about media variants, and so on.	Anglophilia, avid reader, writer.	...how myriad forms of excess/decadence can contribute to self-delusion, tragedy and trauma.
Pauline	UK (N. Ireland)	Female	Moderate (had read twice/seen TV and film versions)	Gender; British heritage	Low: visited once	Loves the atmosphere the novel creates, as echoed in Hitchcock's original film.	More sympathy for female protagonist when younger.	Interest in critical studies, especially feminism, shaping fascination with class and gender elements.	...class privileges and having agency (or not) over the decadence that the aristocratic lifestyle encourages.
Robin	UK (England)	Male	No prior engagement	Cultural texts, Branding	High: raised nearby	None	N/A	Interest in material semiotics, atmospheres, landscape and place.	...the haunting properties of memory, and the charisma of personality to inscribe place and inanimate objects with meaning and emotions.

classifications; instead, we found we could enrich each other's salient categories by offering examples to support them. Table 19.2 summarizes the final set of negotiated categories, and the team member who originally proposed each. Because the purpose of this chapter is to elucidate the CCR methodology, space precludes us from offering a full interpretation of these codes.

*Table 19.2 List of key codes and descriptors pervading *Rebecca**

Key Code	Description	Macro/Micro Aspects	Generated by...
Elusiveness	Inability of the reader/characters to grasp the true essence of a phenomenon (e.g. characters, reality), due to inexperience or self-delusion	Micro – rooted in du Maurier's stylistic choices	Cele
Irresistibility	Magnetic draw of elements of the novel (characters, setting)	Macro – rooted in sociocultural norms	Robin
Omnipresence	Persistent, often oppressive looming of a character or element	Micro – rooted in du Maurier's stylistic choices	Robin
Possession	The captivating, capturing and embodiment of characters and elements into other characters	Micro – rooted in du Maurier's stylistic choices	Pauline
Rebellion	Flaunting of the unconventional	Macro – rooted in sociocultural norms	Pauline
Shock	Sudden occurrences that send the plot/characters into new and unanticipated directions	Micro – rooted in du Maurier's stylistic choices	Cele

### **Step 5: Writing and Winnowing**

We then divided up these categories between us, sharing the task of writing up our analysis for presentation at an academic conference. We did not find this practice to differ much from writing up findings based on other qualitative methods. Specifically, we structured our presentation around our research question, then offered the collective emergent categories of compelling elements from *Rebecca*, supporting our analysis of each category with vivid exemplars from the text. We note that although our collective interpretation led to an interpretive synthesis we all found comfortable and comprehensive, CCR could be equally illuminating with respect to understanding plurivalent and paradoxical texts if team members' interpretation differed wildly – and such divergence should be captured in the reporting of methods and findings.

## **EXPANDING CCR TO OTHER AREAS OF MARKETING**

Why has du Maurier's *Rebecca* remained consistently compelling to consumers and producers? Although this chapter focuses on demonstrating the principles and processes of CCR, our collective close read illuminates how the novel's appeal lies in its plurivalence and paradoxicality at micro and macro levels. In a very real sense, it is a pop-culture page-turner, a nostalgic paddle in the shallow lives of the British upper classes. Yet simultaneously, its elements of

gothic horror confront us with the emotional and object attachments that haunt our lives and relationships closer to home.

In short, our interpretation of *Rebecca* demonstrates that CCR is particularly useful to tease out polysemic meanings in a text. When used by practitioners and scholars, it can be a useful tool for understanding commercial and cultural texts that are likely to be potent harbingers of meaning. Of course, this will be especially true if the texts selected are crafted to be ambiguous, intersectional, paradoxical, plurivalent and pluralistic – as *Rebecca* demonstrates. These types of texts are not only prominent in the marketplace, but often dominant in their categories and in consumers' lives (Brown, 2006a).

Consider, for example, the impact of text-based brand franchises such as *Harry Potter*, *Lord of the Rings* and *Star Wars* – and their continually-produced textual variants such as narratives, songs, slogans, images and person brands (Fournier and Eckhardt, 2019) that organize and affect consumer experiences (e.g. Hill et al., 2022) and breed uncontrollably on social media (Cocker and Cronin, 2017). Given the cumulative and complex nature of many cultural texts and the various ways they can shape consumers' lives through both meaning and affect (Lonergan et al., 2022), we advocate expanding the use of CCR beyond merely verbally-based brands into the analysis of multisensory and multiplatform media.

CCR is appropriate and beneficial for the analysis of many types of commercial and cultural texts in diverse media. Future applications of the method could illuminate the meanings of overlooked types of commercial texts – e.g. those that consumers often find engaging, but which may have suffered benign neglect by academics. One such textual form is packaging, which can not only have aesthetic appeal for consumers, but also contribute to decisions pertaining to their wellbeing (e.g. messages on cigarette packages; Scheffels, 2008). Related to this example, although our example has been entirely text-based, CCR could be developed to include combinations of visual and verbal components so common in contemporary consumer cultural texts from film to gaming and social media.

To maximize the interpretive potential of CCR in future research, we recommend researchers consider augmenting aspects of the method. For instance, by taking deliberative action regarding the selection of a research team (see Sherry, this volume), researchers might select team members from diverse cultural, ethnic, gendered, classed or theoretical backgrounds, which could help leverage multiple positionalities to deliberately diversify CCR outcomes. Indeed, for reasons of reflexivity, team approaches to qualitative research can highlight and ameliorate biases that emerge through the dominance of particular subject positions (see Burton, 2009).

Such considerations can enable not only academics, but also practitioners, to use CCR to discover diverse interpretations that marketing communications and text-based brands elicit in television, film, streaming services and social media. Capturing (and controlling) the meanings of commercial products that feature in these media spaces is crucial in politicized marketplaces where judgments about the meaning of texts can determine a brand's financial success or failure. Consider the recent controversy over the transgender TikTok influencer Dylan Mulvaney's endorsement of Bud Light. While both lauded and reviled (Holpuch, 2023), this association is nonetheless estimated to have cost Anheuser-Busch \$3–4 billion in valuation (Norton, 2023). Academics and practitioners could find that collaborating with teams of consumers and practitioners who engage in CCR of texts – both before and after these texts appear in the marketplace – could better reveal disparate interpretations, and the consequences that might result from consumers' divergent readings.

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## 20. Autoethnography: steering away from too much about introspection

*Hela Zouaoui*

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Not the fruit of experience, but experience itself, is the end ... To burn always with this hard, gemlike flame, to maintain this ecstasy, is success ... on this short day of frost and sun ...

— Walter Pater (1947, 573)

### INTRODUCTION

Today, the world is witnessing a progressively growing emphasis on the self. Cultural phenomena such as storytelling, sharing autobiographies (Brown, 1998; 2005; Smith et al., 1994), self-help movements and reality TV shows are invading the (social) media. This popularization exists in academic circles as well, as personal stories are proved to be in tight relationship with theories. Academic opinions on introspections and personal narratives are, however, divided between rejection (Wallendorf and Brucks, 1993) and embrace (Gould, 1991; 1995; Holbrook, 1986; 2006) for reasons varying from rejecting subjectivity to appreciating honesty while having a political dimension when sharing one's story.

The renewed embrace of a more analytical version of research through personal narratives, memoirs, diaries, journals, meditations (Gould, 2006), subjective personal introspections (Holbrook, 2006) and particularly autoethnographies (Ellis, 1996) is registered and attributed to the growing academic appreciation of qualitative research overall and storytelling techniques in particular. In this chapter, I will present an overview of autoethnography as a qualitative research method/writing starting from its origins and evolution, characteristics, way of conducting it, and challenges and critics. In each section, I incorporate some of my personal autoethnographic work about (non)idealized bodies as a consumer behavior scholar and a curvy woman, to provide the reader with a concrete example of autoethnographic writing to properly grasp a sense of the particularities of such methods.

### AUTOETHNOGRAPHY: DEFINITION, ORIGINS AND EVOLUTIONS

Belk (1986, 25) suggests ‘one can learn more ... from a reasonably good novel than from a “solid” piece of social science research’ (see also Brown, 1998). Accordingly, autoethnography is a qualitative research method in the interpretive social science that relies on narratives, stories and writing to connect the personal to the social, cultural and political. This approach considers autobiographical data and personal experience as a source of knowledge that can offer insights into social and cultural experience (Ellis and Adams, 2014). It allows for the expression of social research as a person-centered phenomenon, yet in a humanistic spirit (Hackley, 2015). ‘Autoethnography is an approach to research and writing that seeks to

describe and systematically analyze (graphy) personal experience (auto) ... to understand cultural experience (ethno)' (Ellis et al., 2011, 273).

Autoethnography is rooted in the social and human sciences. When first used in anthropology, researchers considered it as the practice and writing of ethnographies of their own people, calling for a move towards the personal by acknowledging the researcher's presence in all ethnographic work (Goldschmidt, 1977; Hayano, 1979; Heider, 1975). The 1980s were marked by interest in storytelling, personal narratives, subjectivity and reflexivity in academia (Denzin, 1989; Oakley, 1981), and the discourse around personal stories gained more attention in academic circles. Qualitative research books included chapters about personal experience, ethnography, introspection, writing, autobiography (Belk, 2017) and reflexivity in research (Clandinin and Connelly, 1994; Denzin and Lincoln, 2011; Ellis and Bochner, 2000), carving out a place for autoethnography.

At the same time, sociologists, psychologists, communication and gender scholars and ethnographers were rejecting the idea of hiding behind objectivity while conducting research and embracing a more internal position acknowledging themselves as parts of their studies. Academics from multiple fields considered such methods as solutions for the crisis of representation of the 1980s as they provided voice to under-represented minorities, claiming scholarship must recognize different kinds of people and their related assumptions about the world. This approach stood against the canonical forms of doing and writing research that advocates a singular white, masculine, heterosexual middle/upper-class, Christian, able-bodied perspective (Ellis et al., 2011).

However, in the 1990s, the term 'autoethnography' came to refer to a form of personal introspective displaying the engagement of the self with social and cultural descriptions (Ellis and Adams, 2014; Deck, 1990; Lionnet, 1989). It combines elements of ethnographic analysis of and of autobiographical introspection. Autoethnographies serve as real narrators of minorities, as they give voice to marginalized groups and evoke the recognition of emergent ethical issues in research (Ellis and Adams, 2014). It helps demarginalizing perspectives and experiences through its authentic and analytical sharing. Its type of writing can be framed around acts of activism and resistance (Denzin, 2017).

### **Autoethnography Excerpt #1**

Looking back to my childhood years, I would say I was happily dumb. I wasn't aware that my body shape, or the fact that I was a chubby or fat kid, would mean so much to the world and society. My body acted as a moral/social signifier that became the major criterion to classify me as 'in' or 'out' most of the time (Belk, 2019). It was, and still is, the only real home my soul ever truly lived in. God knows this isn't easy when your inside doesn't match your outside most of the time. In my circle of friends (sisters, girls, guys), I am always the youngest, weirdest and fattest. That makes me very noticeable, even though most of the time I don't really seek the spotlight and am much more comfortable in the shadows, as I learned to choose to be. However, living in such a body makes it evident that I will likely be the first thing that catches the eye: 'the giant elephant in the room,' as some would say.

It's horrible what happens to fat young girls who feel lonely. I turned to food for comfort, for love, for pleasure in harsh circumstances. That amount of loneliness is unbearable for adults, not to mention young vulnerable girls who are victims of something that isn't their fault. I am certainly not trying to justify my fatness, nor am I saying I should. I don't think I owe anyone an explanation for the reasons behind who I am and how I look; no one should think that. Being fat is treated as a sin, a shame, a lost battle, while in fact, it is quite the opposite. I defeated my sadness and managed to find a small source of pleasure through food in that dramatic rollercoaster, and it was very comforting.

## AUTOETHNOGRAPHY TODAY

Today, autoethnography is flourishing, and academics from various backgrounds embrace the technique, despite its ongoing controversy. Dozens of essays and research papers, books, conferences, special issues and entire journals are dedicated to this method (e.g. Adams, 2006; 2008; Adams and Wyatt, 2012; Chang, 2008; Pelias, 2011; Sikes, 2013; Spry, 2001; 2016) and testify to its acceptance and importance to academic works. Accordingly, the autoethnographic movement has crossed scientific disciplines and reached the business ones as well. Prior to that time, personal narratives (Belk, 1986) appeared in business and marketing mainly under the form of Subjective Personal Introspection (SPI) to narrate the writer's own consumption experience. Holbrook (2006) notes, 'the consumer researcher engages in a sort of participant observation of his or her own consumption experiences and the relevant meanings or emotions that they evoke – what a cultural anthropologist ... might call autoethnography' (716).

Today, autoethnography is even more accepted within consumer research because of its distinctive contribution with respect to writing. Hackley (2015) argues that autoethnographic texts challenge the epistemological positivistic reporting manner that caused many marketing professionals and academics to stop reading business papers. As Brown (2005) argues, the craft of writing is critical to the success of consumer research, as compelling writing triggers audiences to read and thus creates links with them.

### Autoethnography Excerpt #2

I used to think of eating, shopping and exercising as disasters happening to me. I was terrified. As much as I loved food, I couldn't declare that love when I was having company. People look at you as if you're always hungry. In restaurants, they serve you first. They look at you while you're eating with pity or hatred. Oh my god, I remember avoiding eating with company when I was much fatter than I am now. I was terrified. I couldn't look at my food, bite it, chew it, or swallow it without people gazing. One person literally told me once he wanted to see me eat to stimulate his appetite. Shopping is worse. You know you're fat when salesmen tell you when you pass by their shop that they either don't have your size, or they try to rush you in because they do. Your size is never available; it's as if the society and the fashion industry is telling you: Get fit, get thin, surrender and obey the rules (Parmentier and Fischer, 2011). If you do however find your size, it's in shops for moms or grandmas, and the style looks insanely way too old for your young age and baby soul trapped in a fat body. AND they charge you triple the price, claiming that for such 'sinner' sizes, they have to use double the amount of fabric. Finally, once you accept all these conditions, especially when you're out of options, nothing seems to fit right. You look ridiculous in everything you try on. Dominant Fashion is not friendly to your body (Scaraboto and Fischer, 2013). The stomach area is always problematic, your rolls stick out on the sides; your thighs are smashed; your hips are flagrantly big in a non-attractive way; your arms won't allow the shirt to reach your shoulders; everything is falling apart, and you look like someone completely helpless in maintaining self-control. Congratulations, you look exactly like society sees and tries to portray you: a loser.

The gym is the worst of course. It's always the worst place for an oversized person to be. It's an accurate, evil reminder of how out of shape and how much a loser you are. While everything you do is an attempt to hide your body, to make it smaller and avoid looking at it, in the gym, you are surrounded by mirrors (Falk, 1994). Everything you do requires looking at yourself and your body. You must look at yourself exercising to make sure you're doing it the right way, and you must gaze at your body parts trying to see potential changes. I hate that. I HATE it.

I have a gym phobia, if that's even a thing.

In the example above, the gym is a scopic field. Intimidating people – fit healthy and doing a far better job with their bodies – look at you, and see you are so insecure and vulnerable. I spent my entire life molding my body through different mechanisms, acquiring the habit of never looking at it while showering naked or getting dressed, hiding what I (or others) didn't want to see. In the gym, I can't avoid conversations about what to improve and what's wrong with it, and I certainly cannot stop people from looking at it. The worst part is, I have to look at it too, and stare. I thus have no power over it. I cannot handle the idea of seeing myself suck at something. And this is why I hate it; it makes me feel like a loser.

## UNDERSTANDING AUTOETHNOGRAPHY'S WRITING PROCESS: TRIGGERS AND CRITERIA

Ellis and Adams (2014) argue that autoethnographies are most often born after the researcher experiences an epiphany in their life that alters understanding of common experiences and leads to personal struggles and dilemmas. These complications are detailed in the narratives, discussed and analyzed under the purpose of joining and adding to an academic conversation. They thus provide several principles on which the method relies. For instance, the use of personal experience provides insider knowledge that can be projected to critique a social/cultural experience. Such critique is only attainable once it is combined with a mastery of knowledge and familiarity with related existing research.

I started writing my autoethnography that I titled 'Confessions of a Body Monk' over a few months (in the second year of my doctoral program), mainly to display my personal body-centered experiences and join a broader academic, social and cultural conversation (Ellis and Adams, 2014). I started this project for my doctoral thesis, and struggled at first to find my voice and open a discussion about the topic. Furthermore, as the topic of body image is a taboo, and because I understood that this method requires honesty and vulnerability, it was challenging for me in the beginning to meet these requirements through my narratives. I eventually acknowledged my (rhetorical) insider position (Hackley, 2015) and studied my self as an other while reclaiming my body.

Autoethnography lies at the intersection between the self and other and the self and culture (Ellingson and Ellis, 2008), using personal experience to illustrate facets of cultural ones, and in consideration of how others may experience similar epiphanies (Ellis et al., 2011). It is therefore interpreted as the bridge linking autobiography and ethnography (Ellingson and Ellis, 2008). Autoethnography as a research methodology, which implies a process consisting of several steps, exists for those who wish to conduct it. As the term is composed of both autobiography (auto) and ethnography, the method consists in using related practices of both (Ellis and Adams, 2014). However, one is not obliged to provide proof of ethical conduct during research, as the fieldwork involves diving into one's personal experiences (Anderson and Glass-Coffin, 2013). The narrations are seen as a reflexive diary over a short period in time, during which the autoethnographer retrospectively and selectively writes about epiphanies made possible by being a part of a specific (sub)culture (Ellis et al., 2011). These writings are more than just merely telling stories, but rather scrutinize experiences analytically, resulting in a (personal and emotional) story framed around theoretical and methodological tools.

Compared to other methods of introspection, autoethnography allows researchers to study their own narrations. Along with the struggles and dilemmas these narrations vulnerably and

honestly reveal, researchers discuss, analyze and critique their self-generated texts, aiming each time to open or broaden an academic conversation. For example, each time I wrote an episode, I used my personal experience combined with my knowledge of existing related research to broaden the scope of research and extract the social/cultural from the personal. Topics in my episodes varied from body-centered consumption experiences to broader ones about my body: revisiting common experiences, my relationship with the other, the meanings of living in such body, my love/hate battles with it, and the consequences of such a fluctuating relationship.

Once I emptied my bag and ‘cleaned out my closet’ – that is, wrote with pure honesty about my body – I started organizing the texts, attempting to structure my autoethnography and tell my story in a way that would make sense to and resonate with readers. I chose to narrate the story of my fluctuating relationship with my (de)stigmatized body, starting with my childhood years and extending into adulthood; this timeline helped me join multiple body-centered theoretical conversations, and broaden neglected ones.

## THE WRITING PRODUCTS

Autoethnographic writings can be evocative and artful. Writers rely on telling and showing techniques to engage readers with their life stories, and invent ploys that can be structured according to chronological frame. Ethnographers’ thick descriptions provide readers with exhaustive representative details regarding a specific culture, with interpretations of them. In contrast, autoethnographers combining both writing styles of ethnography and autobiography, striving to produce aesthetic, artful and evocative thick descriptions of personal experiences that should resonate with others when broadening social and cultural frames. It is an alternative form of writing, and can make for uncomfortable reading (Denshire, 2014).

### **Autoethnography Excerpt #3**

My body goes through a lot daily. I scratch it to clean it, use different chemicals despite their potential for long-term harm; my skin gets occasionally burned and my shape gets modified on a daily basis by corsets and tight jeans, unfit bras, and small panties trying to control unwelcomed fat taking over my body. When I reach intense levels of pain, I develop a different relationship with my body. I reconnect with it. I read somewhere that pain allows you to feel pleasure because it’s a way to reconnect with your body (Roux and Belk, 2019). My baby, today I chose to love you, poor friend, with all your imperfections. You’re already in so much pain; and it’s not your fault, like a Down’s syndrome kid being unfairly discriminated against. I love you with your generosity in fat and skin; I love you with your scars and stretch marks, tiger stripes and natural tattoos recounting your won previously battles against fat. I love you with your grabby curves that testify to your femininity and fertility. I love every single feeling and contact you bless me with. I love you during the blues the most, because I know how much you’re already suffering on a daily basis, with their burning looks, their whispers and their rude, straightforward, ‘honest’ comments. I love you a little less in everyday life, where you just have to get by. But I love you the least when you trap me inside of you and take away my right to a happier life and more opportunities. I do however forgive you; you’re doing your best.

Autoethnographic texts are personal narrations incorporating the usage of ‘I’. Their peculiarity lies in the fact that these narratives do not rhetorically position the speaker outside the text as a neutral observer (Hackley, 2015). The researcher explicitly acknowledges their internal position through the texts, while simultaneously analyzing the self as an ‘other’. Holbrook (2006)

argues autoethnographies are like mirrors and photos, which don't lie. These texts display aspects of the human condition as they are honestly and analytically written by humans, about humans. Autoethnography leverages a researcher's personal experience to describe and critique cultural beliefs, practices and experiences (Adams et al., 2015).

## CHALLENGES AND CRITICS

### **Positioning Oneself Within Autoethnographic Work: Writing About Writing**

Perhaps the first challenging aspect of conducting an autoethnography is acknowledging and accepting that the writer willingly puts themselves in the spotlight, being as brutally honest as possible about personal and vulnerable experiences (Ellis et al., 2011). At the onset of a project, this outcome could be a huge obstacle, given that diving into one's memories and recalling/displaying painful details can be overwhelming.

Moreover, as this method requires both conscious awareness and self-examination, the produced text is self-indulgent and obviously subjective. The author embraces and celebrates this reflexive subjectivity and self-examination, understanding it serves as a bridge to the reader who is likely to find the work compelling (Ellis and Adams, 2014). This means the autoethnographer also analyzes their 'hooks' within the narration as they write them. Furthermore, the writing that results is very controversial, as one of the most severe criticisms of autoethnography is that it is too artful, not scientific and even seen as bad writing (Denzin, 2014). Autoethnographic texts are thus supposed to be artistic, analytical, engaging and human all at once. In my autoethnography, I too attempt to approach my body as *a site of scholarly awareness and corporeal literacy*. I acknowledge my subjectivity and intellectually enriched mind by delving into scholarly works on the body and beauty topics, and how I draw from them along with my personal experience(s). I present these as honestly as possible, reflecting on the tensions and related coping mechanisms when comparing my marginalized body to a culturally constructed ideal. Attempting to 'redefine the script I was written into' (Norwood, 2018, 79) as a curvy woman through the politics of empowerment, my autoethnography emerges as a chronicle of body shaming and celebrations depicted through several episodes of a (dis)identification process.

### **Writing for a Purpose, and More**

The most challenging part about writing an autoethnographic text is meeting its aims and rising above its controversy. Autoethnographies illuminate the intersection between the self and other, and the self and culture (Ellingson and Ellis, 2008). Autoethnography exposes the vulnerable self while simultaneously reflecting on the social and cultural aspects of the personal experience (Ellis et al., 2011). Autoethnographers recognize the role of one's relationship with others in presenting research as a socially conscious act. Concrete personal reflections provide useful insights about social interactions, structures, constraints and general human experience. Understanding life stories creates practical goals of empathy, coping and

healing (Ellis and Adams, 2014) as they contain real emotions, actions and embodiment. Thus, the writing itself can be therapeutic.

Because humans are corporeal beings, autoethnographers shed light on related taboo issues that are usually ignored or hidden by others, such as addressing bulimia (Tillmann-Healy, 1996). With this empowering voice, autoethnography helps engage with political work through resistance (Faulkner, 2018; Couser, 1997) and raises public awareness about sensitive issues often portrayed as shameful and linked to marginalized individuals (Ellis and Bochner, 1992).

My autoethnographic narratives display the dynamic and fluctuating relationship I had with my body as I was growing into the woman I am today. I show in detail and with brutal honesty how I was affected by the stigmatizing social discourses that address the fat body when I was a kid; how these affected my body-centered and other consumption activities (placing me in a constant struggle between hating and loving my body), and how I managed to reclaim my body as an aspect of my active self and as a survival strategy as I grew older. I finally illustrate how sometimes I (paradoxically) still adhere to the most deeply entrenched prejudices of non-idealized beauty of large-sized females, with altered insecurities and self-shaming, and how occasionally, I embody similar prejudice towards others.

Autoethnographical texts can enable an inspiration for activism as it can link individual to collective experiences. It allows for critical reflection of common and taken for granted aspects of self, society and culture (Spry, 2001). These texts can be empowering, as they help people break silences (Adams, 2016), reclaim voice (Faulkner, 2018; Norwood, 2018), heal and cope with pain, loss and anger (Clarke, 2017; 2018; Ellis, 2010). They analytically display stories of recovering and surviving (Spry, 2016; Tamas, 2011). The resultant texts allow the writer to take advantage of their liberatory quality (Pratt, 1992), which they can only reach after starting the writing process.

Taking into consideration the dynamic nature of both body and beauty institutions, I tell a story of a constant (dis)identification process of one's self and body on an individual level. Society, culture and markets set rules for the dominant beauty model constructed around leanness and healthiness discourses (Zanette and Brito, 2019) empowering the cult of fitness. This binary model (Ponterotto, 2016) rejects fatness and negatively influences body-centered experiences for plus-sized individuals. Autoethnographies give voice to socially marginal identities (Ellis and Adams, 2014). I join this conversation as I expose and analyze my day-to-day struggles and experiences of living with major bodily stigma (fat). By displaying as honestly as possible my emotions (shame, anger, pain – but also relief, peace and joy) I oscillate from (and link) the interpersonal to the social.

## TRUSTWORTHINESS AND ETHICS

For a long time, qualitative researchers have been presented in terms of dichotomies, on a continuum with ends varying from scientific positivists to artistic interpretivists (Ellis and Ellingson, 2000). Autoethnographers anchor their understanding of qualitative research accordingly, tending to place this method based on polarities varying from the analytic to the evocative (Hunt and Junco, 2006). Analytic autoethnography provides theoretical explanations

of social phenomena; thus, it is more favored by many academics. The evocative form focuses on delivering narrative representations that open up and broaden conversations evoking emotional responses among readers (Ellingson and Ellis, 2008). Leading autoethnographers and academics argue, however, that the evocative variant actually challenges dichotomies, in displaying in high relief blurred boundaries between researcher-researched, objectivity-subjectivity, process-product, self-others, art-science and personal-political (Ellingson and Ellis, 2008). Deliberately confusing both the scientific and humanistic ends, this method acknowledges the impossibility of creating detached research, and locates objectivity in the rhetorical elements of presenting the research. Accordingly, it uses subjectivity as a bridge to the reader and as a source of rich ethnographic insights generated by studying the self as other.

Along with subjectivity, another major cause for criticism of this method is its artistic value. Argued to be too artful and thus not scientific (Denzin, 2014), this qualitative inquiry is placed between quasi-foundational and non-foundational academic works (Denzin and Lincoln, 2011). The criteria and standards for validity and reliability are replaced with other ones. Indeed, autoethnographers perceive ‘reliability and validity’ to be literary terms (Hackley, 2015): reliability is replaced by credibility of the writer and their ability to honestly narrate the most vulnerable, painful, intense and sometimes embarrassing details. Likewise, validity is jettisoned in favor of the reader’s response: is the story convincing, coherent and emotionally resonating with the audience, and does it reconstruct one or more elements of life in a way that resonates on a level personal first, and on social and cultural levels thereafter?

Dedicated to this particular approach, reflexivity, trustworthiness, credibility and transparency are respected along with a purpose of conceptualizing inquiry within a moral frame. Reflexivity in autoethnography is embedded in the knowledge derived from being both representative of an experience and from the experience itself (Gale and Wyatt, 2019). Texts can be approached as meditations allowing experiential learning (Bochner and Ellis, 2016) and as redemption narrations (Maruna, 2001).

## CONCLUSION

As an academic writing approach, autoethnography is the systematic description and analysis of personal experience in order to understand a broader cultural one. It is known for challenging canonical ways of conducting research, due to its (increased) representativity, political and social fairness, and empathy (Ellis and Bochner, 2000). It combines tenets of autobiography and ethnography to become simultaneously a process and a product (Ellis et al., 2011). It is evocative, meaningful, and grounded in personal experience to link to salient social and cultural ones, which leads to controversies around its resulting subjectivity. Neopositivist researchers push back against autoethnography, claiming it displays a particular focus on the individual and thus lacks a separation of the roles of researcher and introspector (Brown, 1998). However, thanks to its strength in generating deep insights, autoethnographic is considered as a counterweight to positivistic orthodoxy (Brown, 1998).

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## 21. Projective techniques and use of visual images in a digital world

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Common sense also points to an enduring aspect and appeal of projective techniques: children universally love to play ‘let’s pretend’ and more mature consumers do, too, if only we let them.  
– Rook (2006, 154)

### INTRODUCTION

This chapter provides an overview of projective techniques and proposes ways to extend their usefulness in a digital age. First, we discuss the roots and history of these techniques and how they have been used in consumer research in the past. Next, with this foundational understanding, we review best practices for collecting and analyzing data with projective techniques. Finally, we present novel ways for researchers to use projective techniques and visual images moving forward.

### HISTORICAL OVERVIEW OF PROJECTIVE TECHNIQUES

Projective and associated enabling techniques (Boddy, 2005) have a long history in consumer research (e.g. Levy, 1985). They uncover meanings that are less accessible by more direct measures because they rely on ‘attributing to others characteristics individuals cannot or will not see in themselves’ (McGrath et al., 1993, 172). These techniques represent a combination of psychoanalytic theory, clinical social psychology and cultural anthropology (Rook, 1988). Indeed, early works can be linked to Freud and Jung, as well as a large base of literature in psychology. Rook (2006) traces the use of projective techniques from its heyday between 1940 and 1960, including appearing in major academic and trade texts, to its waning popularity in the 1970s in favor of other methods. He points to its resurgence especially due to a series of publications from academics at Northwestern University led by Levy (1985), Rook (1988), Heisley and Levy (1991), McGrath et al. (1993), Zaltman (1997), among others, as well as academic interest in ‘consumers’ emotions, desires, motivations and brand meanings and relationships’ (2006, 144). Some scholars critiqued the techniques for being prone to researcher subjectivity, particularly in the interpretation of data (see Boddy, 2005), and possibly hindering reliability and validity. Rook (2006) offered some counterarguments, pointing to Levy’s (1996) work on subjectivity related to statistical data interpretation as compared to analysis of ‘nontraditional’ data analysis (i.e. stories, images). Rook reiterated the strengths of projective techniques as ‘relatively free from social desirability bias’, as they allow the researcher to access primary motivations and to build theory (2006, 146).

Projective techniques allow additional and complementary insights into consumers' thoughts, feelings and lived experiences. They offer richness to the data and illuminate insights that otherwise may not emerge through more traditional methods. Whether they plumb sensitive topical areas (e.g. consumption of stigmatized goods) or areas of investigation that have rich cultural dimensions (e.g. mealtimes), they bring the story to life. Moreover, over time, projective techniques have evolved in their use and opened up new and creative paths for researchers. Armed with richer data and better stories, researchers can engage in storytelling that makes an impact in the research community and beyond. Next, we provide a brief overview of how these techniques have been employed in early consumer research.

### **Various Forms and Uses**

Rook (2006) outlines the variety of projective techniques, including word association, sentence completion, symbol matching, cartoon tests, object personification, shopping list analysis, picture drawing, autodriving, thematic storytelling, dream exercises, collage constructions and psychodrama – although variations of these have emerged over the years. Consumer researchers, in particular, have successfully used projective techniques, most often in conjunction with complementary techniques such as focus groups or interviews.

Projection can take various forms from text-based, such as the bubble approach and/or sentence completions, to more visual-based, such as photographs, visual diaries, collage constructions, using ads to elicit responses, and many more. For instance, in a text-based approach, McGrath et al. (1993, 177) use sentence completion as one way in their study of gift giving to gain insights (e.g. complete the sentence, 'the gift I treasure the most ...') Other projective techniques are more visual-based. Past scholarship (e.g. Belk et al., 1989; Heisley and Levy, 1991; Wallendorf and Arnould, 1991) has used pictures to explore subconscious thoughts and consumption practices among consumers. In this vein, Coulter et al. (2001) hold that giving consumers' control of the visual images enables the most important issues to become salient. Indeed, scholarship notes much communication is nonverbal, and that higher-order constructs can be articulated through the use of visual images. Visual images and projective techniques emerged in a variety of consumer, advertising and marketing research contexts, including exploring gift-giving (McGrath et al., 1993), mealtime rituals (Chitakunye and Maclaran, 2014), attitudes and consumer responses to advertising and media (Coulter et al., 2001; Russell et al., 2013; Zayer, 2010), consumer desires (Belk et al., 2003), and consumer-brand relationships (Chaplin and John, 2005; Zayer and Neier, 2011).

One of the best-known projective techniques is the Zaltman Metaphor Elicitation Technique (ZMET), developed by Zaltman (1997). This involves semi-structured, in-depth interviews focused on visual images that individuals choose from mediums such as magazines, newspapers, artwork, photographs, and now, online images. The ZMET interview employs several steps, including: storytelling, missed images, Kelly Repertory Grid (Kelly, 1963) and ladder- ing, sensory images, the vignette and the summary image. Through a process of metaphorical expressions, thematic categories, conceptual metaphors and deep metaphors, data is analyzed (Coulter et al., 2001). For a richer description of the ZMET method, we point readers to Coulter's chapter in this volume.

Another growing visual-based method in consumer research is the collage technique, where individuals construct collages using visual images. Early work by Chaplin and John (2005) used collages to examine self-brand connections among children. Children were

provided a board which posed the question ‘Who Am I?’, as well as a series of premade items categorized into five themes – sports, hobbies, personality traits, brand names and TV/movie characters. Collage construction is also used with adults. For instance, Zayer and Neier (2011) explored consumer-brand relationships with men who actively consumed fashion and grooming products: men constructed collages of their gender identities to contextualize their consumption and shopping behaviors.

In summary, among the wide array of techniques available to the researcher, projective techniques have the advantage of employing indirect questioning with stimuli that are often purposefully ambiguous, offering a high degree of freedom to the respondent to allow for open-ended responses (Rook, 2006). Projective techniques have a rich history in marketing and consumer research and can take various forms and uses. They generate rich data as a stand-alone method, but also allow for triangulation and/or complement other methods. We now turn to best practices for collecting and analyzing data with projective techniques, especially with visual images.

## BEST PRACTICES FOR COLLECTING AND ANALYZING PROJECTIVE DATA

This section was informed by the literature as well as interviews with consumer researchers who have worked extensively with projective techniques. It outlines the essential functions of the stimuli selected for the projective tasks, discusses the respective roles of the participant in the task and the researcher in collecting and analyzing projective data, and reviews some of the ethical considerations.

### Role of the Projective Task

Perhaps the most essential aspect of using projective techniques is the selection of tasks or stimuli. In order to identify tasks that will help the participant reflect, it is helpful to consider the essential functions of stimuli (see Figure 21.1).

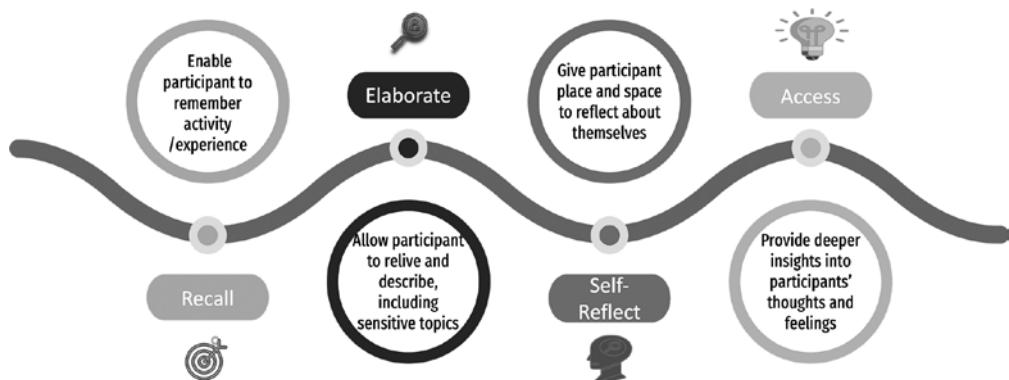


Figure 21.1 *Essential functions of projective tasks*

### **Recall/(Triggering Memory)**

Simple creative tasks allow focus and reflection on mundane activities. One researcher shares that projective techniques are especially useful when the topic of inquiry involves ‘Everyday life activities that (participants) tend to forget’ such as daily meals, routines or items in one’s kitchen cupboard that one tends not to think about (Chang Coupland, 2005). In addition to triggering memory, projective tasks are less subject to the social desirability bias that sometimes surfaces in direct questioning. The indirect nature of the tasks allows the participant a free and unsupervised setting to think about their daily life. This can uncover more insights. For instance, in research on family meals, direct questioning suggested that moms prepared every meal entirely from scratch with freshly made ingredients. By contrast, the collages the moms created included ready-to-eat pizzas and easy-to-prepare dishes. The projective tasks allowed the mothers to become more aware of their actual behaviors and served as a vehicle for them to express their struggles to reconcile the wish to provide healthful and nutritious meals for their children and the realities of busy and modern lifestyles.

### **Elaborate/(Reliving and Describing)**

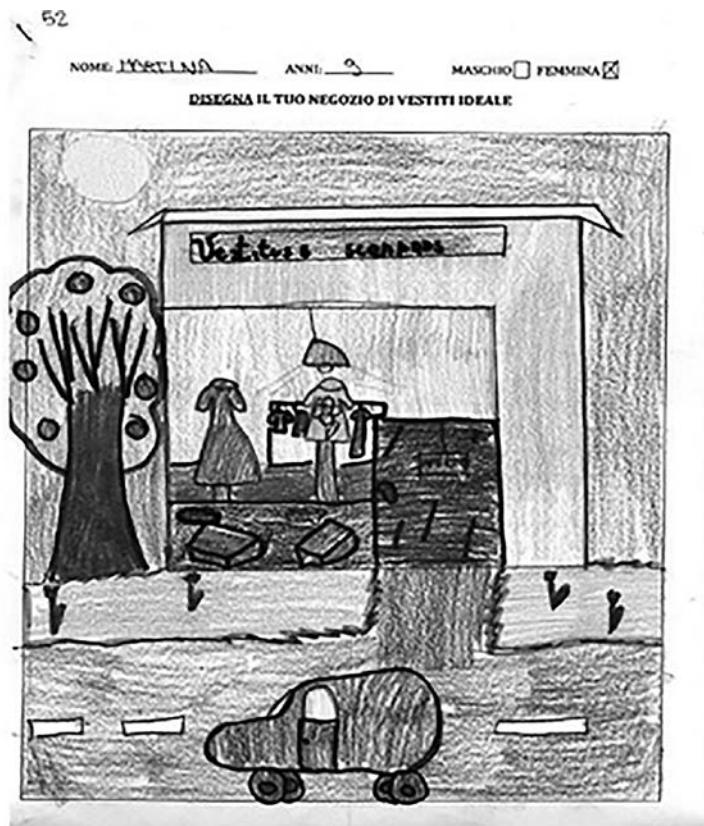
The involving nature of projective tasks allows participants to relive and think deeply about the focal topic. However, because the tasks are creative and ambiguous, not all participants may be comfortable. The researchers we interviewed shared, for instance, that whereas children engage in drawing tasks rather naturally (see for example, Figure 21.2), adults tend to be more inhibited, and the less visually inclined participants may be reticent. As such, offering a variety of tasks is important. For instance, Belk et al. (2003) employed a variety of projective techniques – collages, associations and fairy tales – to investigate the nature of people’s desires.

Collages are often preferred because they are colorful, fun and do not require special skills to create. One researcher shares that providing the raw materials (magazines) provides everyone the same base of materials but removes ‘any differences between individuals ... because of the materials they had accessible to them’.

### **Self-reflect/(Introspecting)**

The fun nature of projective tasks reduces inhibitions and allows participants to express themselves freely: ‘Laughter is the best medicine they say ... They can let their brain rest.’ In the process of creating and then discussing their creation, participants generate a narrative that connects the elements of their creation and threads the items together. Because these elements can be contradictory and of disparate origin, their analysis reveals insights into the relationships between self and objects (Lahire, 2018), and thus allows self-reflection.

For instance, in Russell et al.’s (2013) study of television series, participants created a digital collage of products and services that they could envision the focal character using in a typical day and these collages then guided interviews about the series. The collages circumvented participants’ rationalization and social desirability biases in order to explore consumption’s implications beyond more explicit processes whereby brands serve as vehicles of self-definition and communication (Schau and Gilly, 2003). The projective tasks unearthed latent identity positions reflected (or not) in the media such as discourses of gender, ethnicity, race or social class.



*Figure 21.2 A child's drawing based on a projective task: courtesy researcher Stefania Borghini*

#### **Access/(Tapping into the Unconscious)**

The initial impetus for developing and using projective techniques was to access the unconscious. By engaging informants into magical and absurd stories, the metaphorical process of projective tasks enables access to latent content that escapes rational reasoning (Zaltman, 1997). For instance, Del Bucchia et al. (2021) asked participants to create either a dream or a nightmare collage about the ways in which technology mediates their consumption journeys. The metaphor of the dreams allowed access to deeper reflections, sometimes fairytale-like that revealed feelings of empowerment, but also much darker, haunting concerns about the ways in which technology controls them, which the researchers identified as latent vulnerability.

The ambiguous nature of projective tasks reduces inhibitions. In consumer research, many products/topics can be taboo or uncomfortable to discuss, such as toilet paper or personal hygiene. Projecting and speaking indirectly allows a safe space for participants to think about these topics in ways that direct questioning might not. For instance, one researcher shares: 'Sometimes you get giggles because people say provocative things in the cartoon balloons.'

## KEY ISSUES WHEN ENGAGING PARTICIPANTS IN RESEARCH WITH PROJECTIVES

### Role of the Participant

Projecting into a scene or telling a story makes it easier for participants to recall, elaborate and engage in self-reflexivity, so researchers can gain insights into their thoughts and feelings. Most projective tasks are accompanied by more direct exchange between participant and researcher, whether individually or in group. The hope is that stimuli trigger conversation and exchange about the participant's experience.

With projective techniques, the informant has ‘increased voice and authority in interpreting consumption events’ (Heisley and Levy, 1991, 257). Projecting onto the scene, the participant becomes the object of the exchange and this allows them to verbalize the experience as if they were experiencing it for real. As one researcher who discussed projectives with us put it, ‘it gets the juices flowing and then eases the interview process’.

### Role of the Researcher

The researcher has many responsibilities in projective techniques. As discussed above, the researcher selects stimuli that have the most potential to engage the participant and trigger a rich exchange. When accompanied by interviews or focus groups, projective tasks can be viewed as a form of autodriving. In autodriving, participants see and hear their own behavior through photos and video, offering their emic – or ‘insider’ – perspectives directly to researchers (Heisley and Levy, 1991). The researcher must select tasks that ensure access to these emic insights. One researcher reminds us that ‘you do learn over time’, and recalls their first foray into the world of projective techniques:

Some of these pictures that I wanted people to tell a story about this picture, what’s happening, how does it end, they just struck out. They didn’t touch the ritual elements that I wanted to throw indirectly. With pretesting, now I got better at it. You knew what kind of pictures are going to elicit more material.

### During the Task Creation Itself

The researcher must provide instructions in an understandable manner, but remain unobtrusive during the process. One researcher shares their process whereby they provide reassurance and clarity to the participant during the task:

They get at it, they flip through the pages, and then I walk around and they say, ‘So what am I supposed to do?’ ‘Whatever (topic) – what does (topic) bring to your mind? Whatever comes to your mind.’ ‘So what should I be doing?’ ‘There’s nothing that you should be doing. Flip through the pages, look at the pictures. If something comes to your mind that resonates with that picture, cut that picture out and put it on your piece.’

The researcher should frame these creative tasks in the most fun and engaging manner.

### **During the Discussion**

In addition to the projective task itself, the researcher may interview participants about their creation. In such interviews, the researcher uses the projective task as an elicitation tool to unearth rich insights about the consumption phenomenon. The researcher guides this discussion, often beginning with the simplest of questions such as ‘tell me a story’. Through the cues contained in their creation, participants verbalize their mental states, goals and sometimes sensations. The interview tends to be semi-structured and toggles back and forth between describing the contents of the task and the actual interview questions. For instance, an experienced researcher shares their opening question for interviews based on collages, and how they tag back and forth between asking about the task and the interview protocol:

‘Tell me about how it is that you picked these up. What made you choose these among a whole bunch of other things in the magazine? ... So depending on what comes out and what doesn’t come out, I switch ... sometimes we go back and forth. You go back to the interview, and then when I ask a particular question, since they’ve just done the collage, their thoughts are there, they might go back and use something from the collage once more. So it’s not cut and dr[ied] – first this, and then that. It’s much more, it gets the juices flowing and then eases the interview process.’

### **During the Analysis**

The creations generated in the projective tasks allow participants to make meaning of their experience but also become the raw materials for the researchers to interpret. These materials allow the researchers to engage reflexively and triangulate the contents of the tasks with the observations made during the creation process as well as insights from the interviews (Pink, 2015). But as one researcher reminds us, interpretation of qualitative data always engages the data collected with theory: ‘the whole interpretation ideally should come from theory in dialogue with the data’.

Yet, because the tasks are ambiguous, interpretation can be difficult and researchers may not always agree with each other’s interpretation. One researcher who collected projective tasks across cultures shares that the author team, which was also cross-cultural, often had different interpretations. The team of authors would spend days discussing the visual data collected through the projectives and all the notes (laid out on large tables in a dedicated room):

We went around going through our interpretations and the points that we disagreed on ... the differences pertain to the insider’s view versus the outsider’s view so that becomes important. ... And that’s extremely useful for a deeper, richer interpretation.

### **Reporting the Results**

Finally, an important responsibility of the researcher is to allow the reader to appreciate the connection between the projective task and the findings. Like anthropologists do in their print materials (books or articles), researchers should provide sample visuals of the projective tasks so that readers do not rely solely on the written words. See for instance, the visual exhibits in Belk et al.’s (2003) consumption desire article, Del Bucchia et al.’s (2021) technology empowerment as latent vulnerability, Russell et al.’s (2013) on homophilization in media, Drenten’s (2014) market-mediated milestones in adolescent coming-of-age experiences. Most recently,

Kondakciu et al. (2022) asked Millennial consumers to construct collages of their gender(s) using images from their social media platforms, where the sources of visuals are seemingly endless, showing contemporary uses of the collage technique as well as bringing the informants' stories to life (see Figure 21.3).



*Figure 21.3 Jake, an informant, in the study by Kondakciu et al. (2022) uses images from his social media platform to create a collage of his gendered expressions online*

## ETHICAL CONSIDERATIONS

Because they tap into latent thoughts and feelings and reduce inhibitions, projective techniques are sometimes criticized as 'intrusive procedures that trick respondents into giving information that they would otherwise not be inclined to provide' (Rook, 2006, 153). These concerns are not unique to projective techniques and the same ethical requirements apply to the use of indirect techniques as any other direct questioning. Especially sensitive topics require thoughtful consideration, and the creative nature of projective tasks, such as drawings, can open up many unexpected topics, which are impossible to anticipate in an *a priori* informed consent process.

Due to their indirect nature and ability to dig deep, projective tasks may reveal sensitive facets even when the context is seemingly benign. For example, research about shopping and favorite stores may uncover deep insights about participants' personal biographies, prompting epiphanic life stories and facets of identity that might have remained untapped with more direct questioning (Borghini et al., 2021). Care should be taken when researching vulnerable populations. For example, one researcher said ethics committees recommend that the researchers not interact with children about their tasks without the presence of their parents. These concerns may be even more salient in the digital world, to which we turn to next.

## POSSIBILITIES FOR PROJECTIVE TECHNIQUES IN THE DIGITAL AGE

Digital technology unlocks an array of possibilities for updating projective techniques. Traditional projective techniques, such as word association, sentence completion and others, enable participants to share their opinions and beliefs in ways they may not be able to directly verbalize. In the digital age, consumers turn to social media and other technologies to similarly share opinions and beliefs – even without a direct prompt. Not only can digital media be incorporated into projective techniques, but existing norms of digital culture might also be used in such methodologies. Speaking the language of the internet (i.e. the linguistic particularities) (McCulloch, 2019) is especially useful for researching younger generations who have grown up with social media and are deeply embedded in digital culture. As such, we can envision possibilities for digitally enabled projective techniques across three domains: association tasks, construction tasks and completion tasks. Table 21.1 provides examples of how existing projective techniques might be updated in the digital age.

### Association Tasks

Association tasks provide a stimulus – such as a photograph or word – and ask participants to reply with the first thing that comes to mind. The stimulus acts as a trigger, prompting respondents to share their thoughts and feelings. Traditional association tasks ask consumers to reflect upon pictures portraying people (personality associations), to describe situations connected to a given domain (situational associations), or to choose images – out of a selection of options – that best reflect a topic (forced associations; see Comi et al., 2014). The digital age offers a nearly endless supply of visual content that may be similarly employed in association tasks – from social media posts to stock photos. Social media content can be coupled with interviews to elicit rich responses from consumers. In a study of consumers' use of social media to navigate risk-laden life experiences, Drenten and Zayer (2018) use participants' personal Pinterest boards as prompts for the interviews. The Pinterest boards stimulate reflective discussion that may otherwise be omitted.

On social media, many images are already aggregated through user-generated content. For example, social media users increasingly manage 'shoutout pages', which solicit, aggregate and repost other users' content along with tagging the original user – thus, giving the shoutout (Drenten et al., 2020). These curatorial social media pages provide more authentic, consumer-driven compilations of visual content that can serve as prompts in association tasks.

Curated social media imagery might be used as personality association, wherein consumers respond to images portraying people and reflect upon the role of such imagery in society.

Researchers can draw upon free resources to generate imagery for association tasks. For instance, websites such as Unsplash.com and Pixabay.com offer free-to-use, high quality imagery. This is even more critical when creating representative imagery to use in association tasks. Nappy.com, for instance, offers ‘beautiful photos of Black and Brown people, for free. For commercial and personal use.’ The digital age releases researchers from the expectation of developing imagery themselves; rather, they can draw upon the exceptional digital content already in the online marketplace. Lastly, digital technologies can facilitate word associations. In large group settings (e.g. classrooms), participants can submit words via anonymous polling software such as PollEverywhere, which provides results in real-time in the form of word clouds and responses can be saved for later analysis.

### **Construction Tasks**

Construction tasks ask consumers to state how they believe others would behave, feel or think (Will et al., 1996). Third-person questions and bubble drawings are common construction tasks. Collages and visual mood boards can also capture perceptions of brands in relation to other people. For instance, Hofstede et al. (2007) invited consumers to create mood boards in which they matched magazine cutouts of celebrities with the beer brands they expected each person to enjoy. Construction tasks, such as collages, that were historically developed using analog magazines, can be updated in the digital age using free graphic design platforms. For example, to explore tween girls’ identities, Cody (2012) asked participants to construct e-collages by selecting from 183 previously downloaded images related to brands and interests discussed in prior interviews. Collaborative collage-making offers rich insights across participants in traditional collage-making (Bröckerhoff and Seregina, 2022). Free-to-use graphic design platforms, such as Canva, enable respondents to create collaborative and independent mood boards, collages or other visual responses to a given prompt.

As discussed previously, construction tasks can enable consumers to openly respond without directly stating their own personal beliefs. A trade-off is that construction tasks often elicit social stereotypes and normative exemplars. Similar stereotyping is already native to digital culture. Therefore, consumer researchers can rely on digital resources that parallel analog construction tasks. For example, a common trend on social media platforms like Reddit is to create and share ‘starter packs’ – visual images ‘consisting of one or more images accompanied by (1) titles providing commentary and/or context and (2) illustrating a prototype of a cultural artifact, member of a community, or shared experience’ (Eschler and Menking, 2018, 2). Starter packs capture culturally complex messages of social identity in simplified formats, prompted by an experience (e.g. the first time at Coachella starter pack), location (e.g. the European big city starter pack) or type of person (e.g. the Gen Z starter pack). These images reflect brands affiliated with a particular identity, thus reflecting both brand image and consumer culture. Consumer researchers can prompt respondents to create starter packs to convey perceptions of consumer collectives, which might reveal sociocultural stereotypes consumers may not readily admit.

## Completion Tasks

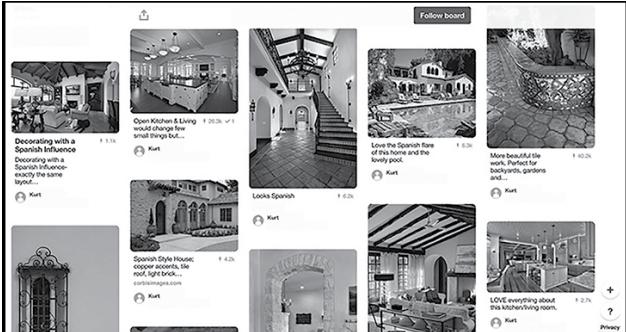
Completion tasks ask participants to finish, or complete, a prompt. The most common is a sentence completion task but other examples include tale completion tasks in which respondents are given a written or visual story and then asked to develop a longer narrative based on the prompt.

Digital media reflect an existing culture of storytelling and much of the content posted online already follows a similar format. For example, memes are images, videos or pieces of text that are copied and spread from person to person on the internet. These common cultural elements of digital media invite consumers to engage in replication by adopting the format structure of a memetic style and infusing it with their own perspective. Memes enable consumers to simplify their ideas and distribute them without much effort.

Memes provide insight into marketplace trends and consumer behavior (Campos and Gomez, 2016) and offer methodological potential parallel to completion tasks. For example, ‘distracted boyfriend’ is one of the most famous visual meme structures. In the stock image, a heterosexual couple is walking along a city sidewalk, holding hands. The man’s head is turned behind him, gawking at a woman walking by while his girlfriend looks on in disgust. The meme structure invites consumers to overlay text on the image to represent real-life things that distract people. This prompts consumers to naturally share inner thoughts and feelings, packaged in the meme layout. Because meme structures, such as the ‘distracted boyfriend’, are widely understood in the language of the internet (McCulloch, 2019), researchers can use these visuals as prompts in completion tasks (see Table 21.1). Memes can be text-based. For instance, marketer and creative director Nathan Allebach curated a Google Doc<sup>1</sup> with over 100 pages of examples of commonly used text-based memes, such as ‘you’re in her DMs [direct messages], i’m (x), we are not the same’. This parody meme first went viral in 2019 and continues to be used to reflect both self-aggrandizing and self-deprecating comparisons. Users posted humorous riffs on the statement such as ‘you are in her DMs, I’m in her Animal Crossing town. We are not the same’ and ‘you’re in her DMs, I’m in the group chat she’s sending the screenshots to’. From a research perspective, scholars could use other similar text-based meme structures in lieu of traditional sentence completion tasks.

Across social media platforms, storytelling affordances provide opportunities for digitally-enabled completion tasks. Sound-based memes similarly offer opportunities for completion tasks. For instance, Vizcaíno-Verdú and Abidin (2022) suggest music-based memes on TikTok enable a form of in-group storytelling. Similarly, on YouTube, individuals share narratives called ‘storytimes’ in which they recount first-person experiences. Storytelling practices on social media can be adapted for completion tasks in the digital age. For example, creation tool ‘stitch’ allows consumers to combine another video on TikTok with one they are creating. Creators invite others to partake in stitching by starting their videos with open-ended question prompts and telling the audience to ‘stitch this’ with their answers. Researchers can invite participants to create video responses to open-ended prompts related to thoughts and feelings about brands or consumption behaviors. A researcher might couple the ‘stitch this’ directive with the question, ‘If brands were real people, who would you invite to your party and why?’ Responses provide insights into brand personification, personality and perceptions, and offer narrative stories similar to traditional tale completion tasks. Potential trade-offs are that consumers who respond to stitched videos on a public platform like TikTok may be influenced by the performative aspects of social media, and sampling is less controllable. To mitigate this issue, researchers can emulate ‘stitching’ in a lab setting rather than on a public social media platform.

Table 21.1 Extending projective techniques in the digital age

Projective Technique	Digital Extensions	Example of What Researchers Do
Association Tasks	Using existing social media content as prompt for imagery associations	 <p>Note: Pinterest board created by the participant</p>
Using digital technologies to facilitate word associations		<p>Ask a class of students, 'What comes to mind when you think of Starbucks?', with answers submitted via PollEverywhere digital platform</p>  <p>Note: Example word cloud produced by the authors using ChatGPT and SpeakAI.co</p>

Projective Technique	Digital Extensions	Example of What Researchers Do
Construction Tasks	Constructing online collages via digital software (e.g. Canva)	<p>Participants create digital collages using online imagery to represent Gen Z</p> 
Constructing visuals in formats native to digital culture		<p>Ask participants to construct a 'starter pack' for someone who is 'basic' (slang for uninteresting)</p> 

*Note:* Example collage produced by the authors using free images from Canva.com under its Free Content License

Projective Technique	Digital Extensions	Example of What Researchers Do
Constructing social media content for imagined individuals		<p>Tell participants, ‘Imagine you are an influencer going on a 3-day trip to a big city of your choice sponsored by a hotel brand. Create a series of posts for your Instagram story while you are on the trip.’</p> 
Completion Tasks	Completing visual or text-based meme formats	<p>Note: Example image produced by the authors using free images from Canva.com under its Free Content License</p> <p>Invite participants to overlay text on the ‘distracted boyfriend’ meme format by imagining their friend already owns one item but wants to replace it</p> 

*Note:* Example meme produced by the authors; background photograph from Antonio Guillem via Shutterstock.com: <https://www.shutterstock.com/image-photo/disloyal-man-walking-his-girlfriend-looking-297886754>

Projective Technique	Digital Extensions	Example of What Researchers Do
Completing story-driven digital content based on researcher stated prompts	Ask participants to create stitched TikTok videos based on the prompt, 'If brands were real people, who would you invite to your party and why?'	 <p><b>RESEARCHER PROMPT</b></p> <p><b>CONSUMER RESPONSE</b></p>

*Note:* Example images produced by the authors using free images from Canva.com under its Free Content License

## CONCLUSION

Projective techniques have a long, fruitful history in consumer research. Our chapter offers potential for advancing such methodologies by integrating the capabilities and cultures of digital media. Further, projective techniques in the digital world foster increased accessibility and affordability for conducting such research. Lastly, the directions suggested here are not meant to replace existing offline projective techniques; rather, the digital world enables a broadening of projective techniques which might be combined with other methodologies to foster richer insights.

## NOTE

1. Google Document curated by Nathan Allebach featuring text-based meme formats: [https://docs.google.com/document/d/1Mvq6HYMvX\\_0uB6z8Bph5LnmMkTvgAqC2rpMDSSL2Eg/edit](https://docs.google.com/document/d/1Mvq6HYMvX_0uB6z8Bph5LnmMkTvgAqC2rpMDSSL2Eg/edit)

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## 22. A metaphoric analysis using the Zaltman metaphor elicitation technique: consumption experience as escape

*Robin Coulter*

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### INTRODUCTION

Seminal work on experiential consumption by Holbrook and Hirschman (1982) propelled significant consumer research over the past four decades on extraordinary, aesthetic and flow experiences (Arnould and Price, 1993; Belk et al., 1989; Celsi et al., 1993; Csikszentmihalyi, 1990; Joy and Sherry, 2003; Orazi and Van Lear, 2023). Much of this work has taken a consumer-culture theoretical perspective using a range of qualitative methods to explore the experiential and sociocultural dimensions of consumption (Arnould and Thompson, 2005). In this chapter, I use the Zaltman Metaphor Elicitation Technique (ZMET) and a metaphoric analysis to explore consumers' Broadway Theatre experiences.

ZMET is a hybrid methodology grounded in verbal and nonverbal communication, visual sociology, visual anthropology, literary criticism, semiotics, mental imagery, cognitive neuroscience and phototherapy (Zaltman, 1997, 2003; Zaltman and Coulter, 1995). The tenets – thought occurs as a pattern of neural activity, not as words; most human meaning is exchanged nonverbally; much cognition is embodied; emotion and reason are equally important and co-mingle in decision making; most thought, emotion, and learning occur without awareness; mental models guide the selection of, processing of, and response to stimuli; cognitions are socially shared; and nonliteral language and especially metaphor is central to cognition – suggest that ZMET is an appropriate tool for investigating customer experiences.

Next, I briefly describe the ZMET procedures and interview probes used in this research followed by the metaphoric analytical procedures. I report substantive findings of the Broadway experience using deep, thematic and visual metaphors to provide further understanding of consumption experiences as escape. The discussion integrates findings from the metaphoric analysis with extant research focused on escape and consumption experiences.

### USING ZMET TO UNDERSTAND THE BROADWAY EXPERIENCE

ZMET involves semi-structured, in-depth personal interviews centered around visual images that the informant brings to the interview (Denzin, 1989; McCracken, 1988). Because of the expressive power of pictures, the informant's visual images are used to probe informants' thoughts and feelings, as these visual images serve as entry points for exploring customer concepts (Weiser, 1988). Moreover, visual images typically represent not only basic lower-order concepts, but also higher-order constructs that contain extensive information and defining attributes. ZMET has been used in academic work (e.g. Coulter and Zaltman, 1994, 2000; Coulter et al., 2001), and also by myriad companies and organizations to understand consumer,

brand, product and firm meanings in over 40 countries around the world (Coulter, 2018). Validation studies of ZMET indicate that four to five interviews can elicit approximately 90% of the core themes available from a larger set of interviews (Zaltman and Coulter, 1995).

Twenty-one individuals from the Boston area (aged 30 to 50, with an annual income of at least \$100,000) – nine Frequent (attended a Broadway show at least once a year; five women) and twelve Infrequent (attended within the last five years, but not within the last two years; eight women) – participated in this study. Approximately half of the Frequent and Infrequent attended a Broadway show in New York City; the other half enjoyed a Broadway show in another city. One week prior to the ZMET interview, informants were sent an instruction letter stating:

We are interested in your thoughts and feelings about Broadway theatre, and the role that Broadway theatre plays in your life ... Please bring 6 to 8 pictures that represent these thoughts and feelings about Broadway theatre productions and the role they play in your life.

The images could be pictures from magazines, newspapers, pieces of artwork, and/or photographs taken specifically for this assignment or retrieved from photo albums. Informants brought an average of seven images to a two-hour taped interview. Table 22.1 lists six steps and interviewer probes for this study; informants were paid to participate. The average transcript word count was 11 770 for Frequent and 10 170 for Infrequent. In the interpretation below, interviews with Frequent and Infrequent are abbreviated F and I, respectively, followed by the number assigned to each participant.

*Table 22.1 ZMET interview steps and interviewer probes*

Storytelling	Please tell me how this image relates to your thoughts and feelings about your Broadway experience.
Missed images	Were there any thoughts and feelings for which you were unable to find an image? Please describe the thought or feeling and tell me about an image that you would use to represent the thought or feeling.
Metaphor probe/expand the frame	If you could widen the frame of this picture in all directions, what else would I see that would help me better understand your thoughts and feelings about Broadway theatre productions and the role they play in your life?
Sensory metaphors	What color/taste/smell/touch/sound/emotion represents your thoughts and feelings about Broadway theatre productions and the role they play in your life?
Vignette	Please use your imagination to create a short story that expresses your thoughts and feelings about Broadway theatre productions and the role they play in your life. Please include at least these characters: (1) you, (2) Broadway theatre productions, and (3) a similar form of entertainment you might enjoy.
Digital image	The informant, using their images and those from a database, works with a graphics designer, to create a summary collage of the Broadway experience.

ZMET interviews provide a rich set of data and the opportunity to use a variety of analytical approaches. For this research, the author first conducted a narrative analysis of the stories contained in the transcripts (Riessman, 1993), followed by a metaphoric analysis (Lakoff and Johnson, 1999; Ortony, 1993; Zaltman and Zaltman, 2008) grounded in qualitative data analytic procedures (Spiggle, 1994; Thompson et al., 1994). Of specific interest to this study are image-based metaphors (i.e. visual images participants bring to the interview, sensory images they discuss and digital images they create), as well as deep metaphors (i.e. basic, core

metaphors that structure consumers' thinking in very fundamental ways and serve to organize a system of concepts), thematic metaphors (or conceptual metaphors that represent consumers' broad meaning themes and reveal various aspects of deep metaphors) and metaphoric expressions (or surface metaphors, the spoken metaphors consumers explicitly mention).

## METAPHORS AND CONSUMPTION EXPERIENCE AS ESCAPE

Escape is a dominant theme derived from the analyses of informants' Broadway experiences. I organize the findings temporally as pre-escape activities, the escape, and post-escape reflection with accompanying metaphors (see Table 22.2).<sup>1</sup>

*Table 22.2 Summary of deep metaphors and thematic categories*

	Deep metaphors	Thematic metaphors
Pre-escape activities	System	<ul style="list-style-type: none"> <li>• Dirty work</li> <li>• Getting 'all dolled up'</li> <li>• Anticipation</li> </ul>
The escape	Container	<ul style="list-style-type: none"> <li>• Sanctuary</li> <li>• Museum</li> </ul>
	Resource	<ul style="list-style-type: none"> <li>• Cognitive stimulation</li> <li>• Sensory stimulation</li> </ul>
	Force	<ul style="list-style-type: none"> <li>• Escape from daily life</li> <li>• Escape to flow experience</li> </ul>
	Connection	<ul style="list-style-type: none"> <li>• Self</li> <li>• Friends and family</li> <li>• Other theatergoers</li> <li>• Performers</li> </ul>
Post-escape reflection	Balance	<ul style="list-style-type: none"> <li>• Good mental health</li> </ul>
	Connection	<ul style="list-style-type: none"> <li>• Self</li> <li>• Others</li> </ul>

### Pre-escape Activities

Pre-escape activities to a Broadway production are best characterized by the deep metaphor, *system* (the set of activities and feelings that precede attendance at a Broadway production), and three thematic metaphors: 'dirty work', 'getting all dolled up' and 'anticipation' (Figure A22.1 in the appendix to this chapter). 'Dirty work' has similar meanings for Frequent and Infrequent and includes making arrangements to attend a production – ticket purchase, hotel, travel and childcare arrangements, and related logistics. The complexities, aggravation and related concerns of preparation are evident: 'I can dread it, again, because of the money, because of the parking. Is it going to be a rainy night? Are we going to get dinner reservations?' [F6]. Others talk about the necessary planning, preparation, and commitment to the evening:

It's something that you definitely need to plan ahead of time ... you have to actually put effort into it, and a lot more money into it, and you pretty much have to think, Is this something that I really want to do? Is this something I really have time to do right now? So, it's also something that like if you buy tickets so far ahead of time, you have to make sure that you're not going to miss out on the opportunity because something else comes up' [I8].

And:

I associate going to a show with having dinner. I associate it with a more a planned event ... It's just more time consuming to get tickets, [and] because you have to go, and you have to plan the event which means you have to put aside a night and you have to say, 'Okay, we're definitely doing this on this night' [19].

Another participant, using a picture of a man who was climbing a mountain, remarked:

Preparing for Broadway is a production in itself ... It's tough, hard work to get there [F2].

'Getting all dolled up' for the production speaks to the extra energies put toward self-presentation in preparation for the escape. Women, in particular, acknowledge the importance of their dress, reporting: 'Everybody knows it's a dress-up event' [F1], 'You want to dress up ... to go above and beyond your typical outing kind of stuff. You want to feel classy, a cut above the rest, refined' [I6], and 'You want to look good for the show. You don't have to get dressed up, but most people do. It's part of the culture' [I1].

Frequents and Infrequent alike look forward to their evening with great 'anticipation', expecting a unique and exciting experience (Figure A22.2 in the appendix to this chapter). Numerous participants used the gift metaphor and images of presents and holidays to reflect their anticipation and not knowing quite what to expect of a show: 'I was actually looking at a gift box. I don't know what's in here ... So you're excited ... that's what I was thinking, anticipating' [F5], and 'A show you've never seen before is like a wrapped-up gift, you don't know what you're going to get' [I12]. Another informant, referencing his image of a fisherman, commented: 'He is anticipating a huge fish. That is the anticipation I think of when I think of the fun at the theatre. You don't know what to expect. That makes it exciting' [I7].

Anticipation fuels escape, and findings suggest that anticipating the escape for Frequents is related to the opportunity to replenish and revitalize themselves (Figure A22.3 in the appendix to this chapter):

The woman in the boat represents the cyclical process where my life started with the introduction of culture, and the exposure to it led to other curiosities. It led to my education, my refinement, and my being able to accomplish a great number of things in my life. Those accomplishments afforded me the life experience of being able to afford to do things like taking my family to a show, carrying on this elegant affair, and giving to the grandchildren – just continuing that whole process [F1].

Both Frequents and Infrequent anticipate their escape as a rare treat, an indulgence, and a reward, particularly given the high Broadway ticket price coupled with the costs of pre- and post-theatre activities. F4 summarizes:

It's really so expensive, so you have to really appreciate the theatre to drop \$100 just for the ticket alone. It's a special treat to myself, like I went recently to get Lion King tickets. I wanted the best seats, and they were a hundred whatever dollars but, I said, 'I deserve this.' ... It's like a reward to be able to go see it. So that's how I think of it, as a very treat to myself that I deserve. If the night costs me \$300, it was well worth, it's just I can't do it that often. I go and have a fancy dinner and have a couple of drinks, and I really go all out, because you deserve it so.

The following images (Figures A22.4 and A22.5 in the appendix to this chapter) and metaphoric expressions are also illustrative:

Broadway is a rich extravagance that I can only have a little bit of a time. I wouldn't want cake everyday, and I wouldn't want to see a Broadway show every day [I3].

In the middle is a dollar bill with someone's eye kind of tearing it, and that's because the cost of the plays are prohibitive for you to go a lot and for us to take our kids to a lot of them [I11].

### The Escape

Four deep metaphors, which are inextricably interrelated, capture the essence of escape via the Broadway production – container, resource, force, and connection (Figures A22.6 to A22.8 in the appendix to this chapter). First, the theatre serves as the *container* or vessel holding the production. For some, the theatre acts as a sanctuary where informants escape from the daily grind to a safe place where they can lose themselves or protect themselves (and possibly others) from work, the phone, kids, parents, burdens and other travesties. F9's comment is indicative: 'When I think of Broadway, I think of the physical location of Broadway, but more than that I think of the experience of being at a Broadway play ... It's a place of escape', as represented by the woman walking on a secluded beach.

Other representative images and metaphoric expressions include:

There is a safe sanctuary that I experience at the theatre. Everyone's cell phone is off. There are no beepers. There are no interruptions. The guys in the bag are all the distractions that are trying to get to me from the outside world, but inside my sanctuary they are wrapped up in this plastic bag, and they can't get to me [I5].

I imagine the rat really running. Kind of looking back at the cat out there, the stress is out there, but hopefully this little guy is safe behind the couch and he may not be thinking about that cat anymore. He may feel safe and just not focus on the craziness that is out there ... I was thinking the same thing when you are in a theatre, and you are not focusing on what is outside the doors. You feel safe ... I mean safe fun. That is escaping the rat race [I7].

Some informants envision the theatre as a 'museum', a place to learn, to experience, to become more cultured, to meet people, to expand one's horizons. Pointing to her picture of a museum, I7 enthusiastically reported, 'When you go to a museum you feel cultured. When I go to a play, I feel I am getting some culture, learning something new, something interesting.' Similarly, F4 commented, 'It's like going to a museum ... it's just appreciating different things.' Broadway enables informants to expand their perspectives, as suggested by I11, 'I want to make sure that I experience as much as I can ... you might enjoy music and all of a sudden, there's a whole new chapter of music you've never considered listening to before ... I know [attending Broadway productions] has made me a smarter and better person.'

Second, Broadway is a well-orchestrated, captivating *force* that facilitates escape. Several informants employed cooking-related visual metaphors (cake and recipe) to connote the intricate integration of the many facets of a Broadway production. Informants respectively stated, 'The cake is the bringing together of different ideas or thoughts and presenting them in a new exciting way that people haven't thought of before' [I10], and 'the theatre is constructed of a recipe, with different ingredients, characters, songs, storylines and experiences going into it ... when it's put together, it really comes together nicely and it can be really delicious or a total disaster' [F6]. The captivating nature of the production is evident in the following quotes and the image of the mesmerized owl (Figure A22.9 in the appendix to this chapter):

[Broadway] captivates the audience and brings them right onto the stage ... it keeps you involved [I2].

I can only image what it takes to be up there and to captivate a live audience [I6].  
 [Broadway] assaults the senses [I10].

The force of the performance facilitates escapism from the ‘day-to-day grind’ [I8] of work and home, from political and economic aspects of life, and from societal problems. From this perspective, escape is very much linked to the theatre as a ‘sanctuary’. Dominant visual images include pictures of vacation spots and luxury cruise liners, coupled with quotations such as: ‘When I walk in there and they turn the lights down ... I forget about work. I forget about home life ... I forget about money problems...it’s an escape route’ [I1]; ‘Going to theatre is like a mini-vacation. I chose a ship as opposed to a beach scenario because when I’m in a theatre, it’s almost like I’m escaping. I’m in this little theatre and the whole world is outside me, but I don’t even notice it’ [F6]; and ‘You are ... shutting out the outside world ... where you want no outside distractions’ [F1]. I6’s image of a woman in a yoga pose illustrates, ‘escape, and being able to go to a Broadway play represents escape from mundane day-to-day stuff and typical entertaining activities, like the movies’.

The force of Broadway also facilitates escapism to a flow state. Many Frequentes describe their Broadway experience as flow – their visual images included people floating, soaring, diving and mountain climbing, and their metaphoric expressions referred to ‘out of body experiences’ and report on having lost all sense of time. F8 remarked, ‘The diver represents a sense of surrender. You surrender your sense of disbelief to the artistic experience of being at the theatre ... an experience of heightened senses.’ Two other powerful images and metaphoric expressions follow (Figure A22.10 in the appendix to this chapter):

The man floating means you get swept up in the emotion of what’s going on onstage. You may get swept up in the costumes and the makeup and the sets, or ... you get really sucked up in just the story itself, just get lost in what’s going on [F4].

Part of the feeling of a show is experiencing the feel of soaring or flying into the unknown, the anticipation of it, what you’re going to see when you’re up there, and benefiting from it emotionally, educationally, philosophically ... [F1].

Third, the Broadway experience is a *resource*, offering both sensory and cognitive stimulation to informants (Figure A22.11 in the appendix to this chapter), well-illustrated by the following image and metaphoric expression:

You become enmeshed ... a piece of the energy. Someone else is putting it out there for you but you become a piece of it, and just get very involved mentally and physically [I10].

Informants’ images representing sensory stimulation include, for example, pictures of fireworks and jumping off cliffs, and their metaphoric expressions reveal the multi-sensory nature of this escape:

The Broadway experience involves all your senses. You get to see it. You get to taste it. You’re talking to people. You’re hearing music. You’re listening to the sounds around you. You’re in a very extravagant, glamorous setting usually, like in a theatre. Most of those venues are very glamorous. It really livens up your senses’ [I8].

And ‘It’s stimulating to the senses’ [F8]. I4 titled her digital image, ‘A sensory experience’, excitedly reporting ‘Broadway plays are very stimulating, the lights, the singing, the dancing,

the costumes ... the firework display represents the sights and sounds of Broadway ... unfolding before your eyes.'

With regard to the thematic metaphor, 'museum', informants discuss the cognitive and cultural resources related to attending the theatre, noting that 'It broadens your horizons ... Broadway is more cultured. I feel like I am doing something positive, an experience where you're learning or expanding your mind' [I9]. One informant used an image of a light bulb to convey that Broadway represents 'ideas and how plays, particularly ones that have books or history attached to them, affect your opinion or change your mind' [I11]. Several informants also report that attending the theatre increases their cognitive creativity, for example 'You can take this creativity with you from a Broadway show and apply it to every aspect of your life' [I10]. 'When I think if I want to reenergize myself, escape, enjoy myself and forget about whatever else. If I thought about five things I would do—Broadway would be one of them. It stimulates you in different ways, at different levels' [F9].

Fourth, *connection* is a prominent deep metaphor, with several connection-related thematic metaphors – connection to self, connection between theatergoers and friends/family/other theatergoers who are attending the production, and connection between theatergoers and performers (present, as well as past). As noted, the escape to Broadway provides a quiet and focused time, and informants (particularly Frequent) reported taking this time to reflect on their connection to self – proffering pictures of mirrors: 'Looking in the mirror represents looking into a play, seeing similarities that may happen in your life and other's lives, something that you can relate to' [F3], 'The mirror is relating it to yourself. It's that, "Oh my gosh, I have experienced that in my life, and so I can relate to it"' [F1], 'I've seen a play and it's made me think of life, my life and relate to my life, but it gives it a different perspective too' [F6] and 'It's sort of a mirror on our own experience' [F8].

Escaping to a Broadway production represents a connection to family and friends – an opportunity to have that 'special evening out' with special people. This connection is illustrated primarily with pictures from family albums and discussion about the importance of having quality time and building a tradition with family members. The salience of having time to appreciate one another was emphasized by numerous participants: '[this is my] family doing something together ... Broadway was something we did as a family when I was a child, and we continue ... we're sharing something ... not a routine ... a ritual' [F1]; 'I would go with my family. Family is important to me and enjoying time with my family is important ... the core of everything' [F7]; 'What I think of theatre [is] gathering my buddies together and having a good time' [I7]; and 'We're going to go as a family, because although I've been before, it's something that I want to share with you guys' [I6]. All theatergoers, even though they may not be acquainted, co-create a communal experience, collectively experiencing a unique moment in time.

Theatergoers also sense a strong connection to the Broadway performers, recounting that it is the audience *and* the performers who co-create a forceful experience (Figure A22.12 in the appendix to this chapter). Informants enthusiastically reflect, 'They see you. You see them. You are laughing, and they are enjoying themselves. You are part of [the energy] together. You feel you are in the loop' [I7]. The relationship between the deep metaphors, connection and force, is vividly apparent in I2's image and metaphoric expression:

It becomes electrifying through the crowd. It is a give and take. It is a relationship between the audience and the performers ... The adrenaline starts to flow, and I think it makes their performance better because they are going to feed off the crowd.

Interestingly, some Frequentes take this connection one step farther, acknowledging their connection to Broadway actors and actresses in general:

There's a spirit of all the previous actors; you feel a certain energy. All these theatres being next to each other, and you're going into one theatre, and these people are going into another theatre and we're all having this communal experience [F8].

The meaning of connection to the performers is also informed by informants' stated disconnect with performers. Our theatergoers compliment and admire the unique and extraordinary skills and talents of the performers, 'I just become amazed with it. Just in awe. It is something that you don't see [everyday], and you appreciate their talent' [I7]. Interestingly, others report being somewhat envious of these talents, 'It's different and exciting and [I am] slightly jealous. When they get up there, they have beautiful voices and this ability to embrace a character, and I couldn't do that' [I10], and 'I have some jealousy ... I work in corporate America, and I like what I do, but what I do is not all that different. I admire these unique talents who do something very different for a living' [I9].

### **Post-escape Reflection**

Two deep metaphors – *balance* and *connection* – capture informants' reflections about their escapes to Broadway. The sanctuary and museum, as well as the force of escapism, provide a countervailing *balance* to our informants' everyday experiences. I8's digital (summary) image incorporates many images to portray managing mental health through escape (Figure A22.13 in the appendix to this chapter):

You do need a little bit of balance in your life, like you can't work all the time, and again, because it is a special treat to [go to a] Broadway show. You're balancing your hectic life with a sense of taking your life down a couple of notches and giving yourself an opportunity to get away ... I've done everything I need to do to make this time my time now. You've fulfilled all your obligations to have that time for yourself.

Frequentes and Infrequentes concur about the importance of taking time to escape and to create balance in life. F4 reflects, '[Attending Broadway is] a sort of mentally refreshing – I mean, if you have a stressful job and you have kids, and you say, "I'm going to do this for myself and I'm not going to feel the least bit guilty" ... so when I do actually do it, I enjoy every second of it, and I don't regret it.' I7 echoes the sentiment, 'You work really hard; you have to play hard, too. It is the balance [of] work with play. (*Why is it important to balance those two things?*) Just because the scale will tip and then you will tip ... I definitely know when I am working too hard, and I need to treat myself. I guess that is a way of telling how the balancing goes.' Suspended animation as related to balance is evident in F9's response:

Just escape into that two-hour performance and really feel it ... it creates balance in one's life ... It helps relieve the monotony of doing the same thing always, everyday, over and over again without any escape from work or school or whatever it is that we might spend the majority of our life doing.

In re-living their escape, informants reference their memories, as well as their interest in sharing their experiences (Figure A22.14 in the appendix to this chapter). The vibrancy of the Broadway experience – the sensory and cognitive stimulation – makes for vivid, easily recalled memories. I3 reveals Broadway ‘sticks out ... [memories] feel more permanent ... I tend to remember exactly where I was and who I was with. I remember the specific music to it. It gives you a memory to put your finger’, and I8 reports Broadway ‘gives you something to think back on, an enjoyable experience you can relive in your mind, you can share with your friends’. Pictures of people talking, enjoying a party or a family outing were reflective of informants’ interest in sharing their memories. F4 used ‘screen beans’ to depict a range of emotions and topics that Broadway has to offer, noting, ‘These little people could also represent the different things you talk about afterwards, which is a big part of it ... You want to share in it, talk about it, discuss it afterwards.’ F2’s description is typical, ‘After you’ve gone to see a show, you might have a discussion ... the idea that [people are] talking and having a mature conversation ... You can have that conversation about a shared, communal experience.’

## DISCUSSION

The Zaltman Metaphor Elicitation Technique and metaphoric analysis helps to elucidate the Broadway experience as escape. Notably, the escape is central and, in this case, can be concurrently considered an extraordinary (intense, intensely enjoyable and transformative; Arnould and Price, 1993), aesthetic (multisensory; Joy and Sherry, 2003), and flow (Csikszentmihalyi, 1990) experience. Deep metaphors, thematic metaphors, metaphorical expressions and visual image metaphors offer valuable insights into the meaning of this multifaceted Broadway experience. Indeed, Turner’s analytical dichotomy of structure and anti-structure offers a theoretical lens to explore the metaphors of escape around the Broadway experience (Turner, 1974), particularly with regard to the antistructure characteristics of liminality, communitas and sacredness. *Force*, as a deep metaphor, with the escape from daily life and escape to a flow experience, addresses the betwixt and between liminality of the Broadway experience (Cova et al., 2018; Csikszentmihalyi, 1990). *The connection* deep metaphor captures the informants’ portrayal of the experience as self-discovery, as well as engagement with friends and family, other theatergoers and performers, and speaks to communitas, an integral component of many extraordinary experiences (Arnould and Price, 1993; Celsi et al., 1993; Seregina and Weijo, 2017). Further, *container* and *resource*, as deep metaphors, address sacredness with the former focused on the physical space of the theatre as a sanctuary and as a museum, and the latter on the mental space and the production’s innate ability to provide cognitive and sensory stimulation for attendees (Belk et al., 1989; Joy and Sherry, 2003). Thus, the Broadway experience enables individuals ‘to take flight from the entanglement ... [as they] seek temporary respite in liminoid spaces offering magic, communion, spiritual enrichment, and the sublime aura of the authenticity’ (Thompson, 2000, 129).

The Broadway experience notably is more wide-ranging than the escape; it has a temporality that extends before and after the escape (Orazi and Van Lear, 2023). Pre-escape activities involve an organized system of behaviors and expectations, including the dirty work and logistics to manage the escape, anticipation of the escape and getting dolled up for the escape. These activities are manifest in consumers’ mundane daily lives. Post-escape reflection is a consequence of vivid, dominating and meaningful memories that provide a steady balance

and connectivity to one's post-escape mundane life (Belk, 1988; Joy and Sherry, 2003). At all stages, the Broadway experience is a co-creation (Arnould and Price, 1993; Celsi et al., 1993), with attendees variously engaging with customer service representatives, babysitters, other theatergoers and performers to plan, create and remember their experience.

Being able to access customers' thoughts and feelings, conscious and unconscious, is key to elucidating marketing and consumer behavior phenomena. The Zaltman Metaphor Elicitation Technique using various analytical approaches, including narrative analysis, metaphoric analysis, visual imagery analysis, and means-end chain analysis, offer a means to hear the voice of the customer, see through the eyes of the customer, and keep the customer and their experience as a focal point in our research.

## NOTE

1. Thank you to Olson Zaltman Associates and the American League of Theaters and Producers for use of the transcripts in this chapter, and much appreciation to John Bell of Olson Zaltman Associates for the creation of the images: 'Reflecting on the cultural experiences of Broadway', 'The prohibitive costs of Broadway', 'Broadway is a sanctuary, no one can reach you', 'Broadway is an out-of-time and out-of-place experience' and 'Broadway brings balance to everyday life'. The other images in this chapter are representative visual metaphors of the images that participants brought to their interview; source: Shutterstock.com.

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## APPENDIX 22A



Source: Shutterstock.com.

*Figure A22.1 Preparing for the escape to Broadway*



Source: Shutterstock.com.

*Figure A22.2 Anticipating the fun of Broadway*



Source: Olson Zaltman Associates.

*Figure A22.3 Reflecting on the cultural experiences of Broadway*



Source: Shutterstock.com.

*Figure A22.4 The rich extravagance of Broadway*



Source: Olson Zaltman Associates.

*Figure A22.5 The prohibitive costs of Broadway*



*Source:* Shutterstock.com.

*Figure A22.6 Broadway is an escape*



Source: Olson Zaltman Associates.

*Figure A22.7 Broadway is a sanctuary, no one catch reach you*



Source: Shutterstock.com.

*Figure A22.8 At Broadway, you escape the rat race*



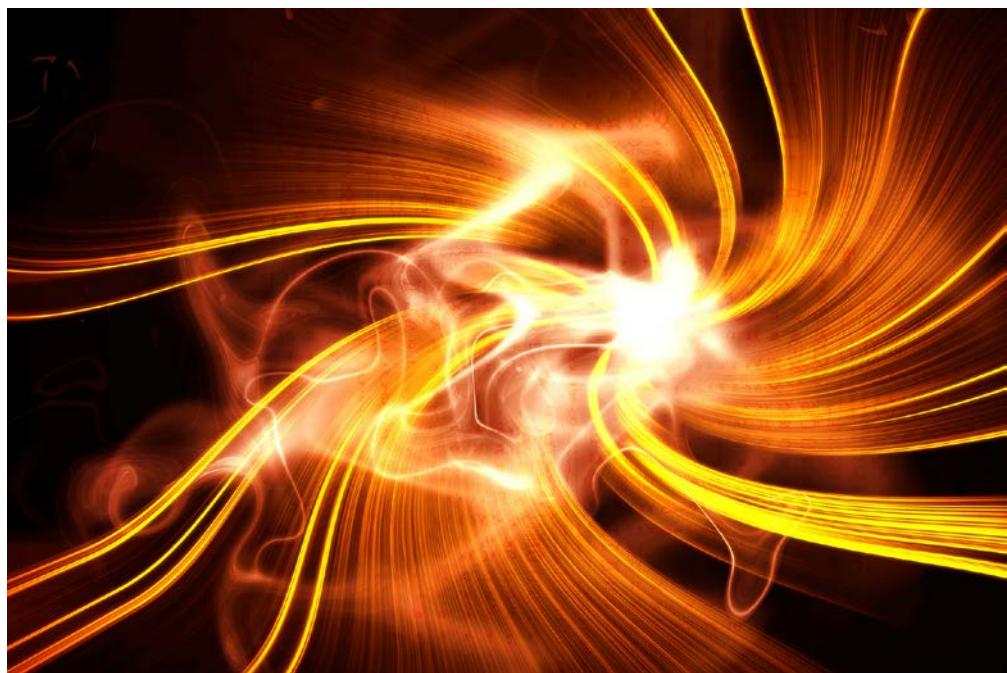
Source: Shutterstock.com.

*Figure A22.9 Broadway captivates the audience*



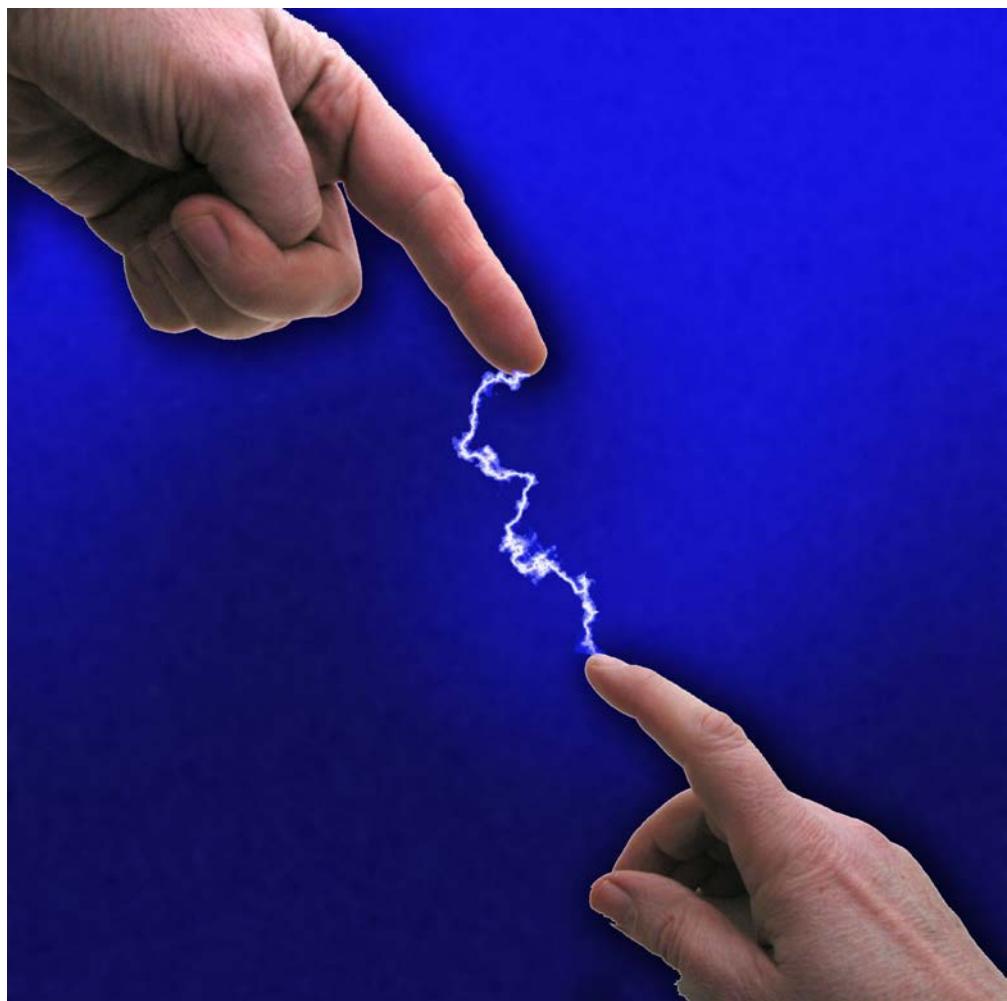
*Source:* Olson Zaltman Associates.

*Figure A22.10 Broadway is an out-of-time and out-of-place experience*



Source: Shutterstock.com.

*Figure A22.11 Broadway is unbounded energy*



Source: Shutterstock.com.

*Figure A22.12 Broadway electrifies the crowd*



Source: Shutterstock.com.

*Figure A22.13 Broadway brings balance to everyday life*



Source: Shutterstock.com.

*Figure A22.14 Sharing the escape to Broadway*

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## 23. Inductive observation: a situational method under constraints

*Dominique Desjeux*

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### INTRODUCTION

When I start qualitative research, whether it is anthropological or sociological, whether it concerns the functioning of an organization (Ferraro and Briody, 2017), the daily life of consumers or the mobility of goods and people, I am still determining how I will approach this new territory. I do not have a hypothesis. I am still choosing the route I will have to follow at the beginning of my research to solve the enigma submitted to me. It is an inductive approach – or abductive, if one prefers this term (Desjeux, 2018a; Belk and Sobh, 2019). Whatever word is chosen, the most important thing will remain to cultivate the joy of discovery by connecting with interesting people, reading, traveling and observing, as Russ Belk writes in the conclusion of his article with Rana Sobh.

Since 1969, I have explored many different shores, including the Ministry of Industry in France, rice cultivation in Madagascar, cassava cultivation in the Congo, body care practices in China, Brazil and the United States, the use of new digital technologies since the 1990s in France and Europe, the use of drugs in Algeria and Thailand, the daily life of French people during the COVID-19 crisis, the emergence of telecommuting, and the functioning of a company selling meters on the French market in 2022. Most of these research fields are commissioned by public administrations, private companies or NGOs (Denny and Sunderland, 2014). They are all about emerging phenomena about which there needs to be more concrete information. These are unknown human worlds for my clients as well as for me. They are the new modern ‘exotic’ worlds (Desjeux, 2021).

I find myself in almost the same situation as the European explorers of the sixteenth century, whose journeys were funded by sponsors who expected a lot from their discoveries. They had a sextant to find their way according to the sun, a depth sounder to avoid shoals, and a compass to orientate themselves according to the magnetic north. During their navigation, they only sometimes knew where their ship was located concerning the coast. Sometimes they had old maps with them, often incomplete and inaccurate. When they passed the equator, the shepherd’s star disappeared, which was one of the prominent landmarks of their navigation. They felt lost. All the ‘states of art’ had become useless to them.

What we can do, as socio-anthropologists, is observe and create landmarks from what surrounds us thanks to our methods and techniques of information gathering. Observing means mobilizing the eyes, as well as the ears, the hands, the nose, and even the mouth at mealtimes, whether we spend several days or several weeks in a village, a neighborhood or a company, or whether we have a few hours in the street or in a family’s home to observe its culinary practices, its makeup habits or its use of the television, the tablet, the mobile phone or the video game screen in the living room or the bedroom.

The four methods of observation of social reality are under constraints of the budget, time and acceptance by the population: scales of observation, systems of action, itinerary method and life cycle tools. Today, with few exceptions, my observations are often no longer participants, in the meaning of Malinowski, who was able to spend several months sharing the life of the Trobrianders (Desjeux, 2018b), or of those I was able to carry out in the village of Sakamesso in the Congo in the 1970s. It is impossible today to spend several days in a modern urban consumer's kitchen, bathroom or living room.

These constraints explain the diversification of the observation methods that allow us to adapt to the diversity of qualitative research situations. At best, one can stay a few days. In 2022, we conducted qualitative research for three months, i.e. 60 days of work, with Jeanne Piedallu, in a company where we were able to do several days of observation in the offices while using methods of interviewing and group facilitation via the internet to minimize the costs.

Such immersions means it is still possible to carry out participant observations lasting several weeks by working in an office, a workshop, a village or a neighborhood if the people accept this observation and if the researcher has the financial possibility to stay. However, today, participant observation is constrained by funding, available time and the acceptance of the population or individuals.

## METHODS FOR CONDUCTING INDUCTIVE RESEARCH

I use four methods. The first is that of scales of observation (Desjeux, 2022). In my surveys, I only focus a little on the individual, his/her motivations and his/her identity, which is more a matter of the microindividual scale and psychology. Similarly, I do not observe much at the macrosocial level – that of opinion polls or quantitative surveys focusing on the great social divisions of social classes, genders, generations and cultures. I focus instead on the observation of situational effects, on the games of social actors, on their interactions, on the power relations that are organized around areas of uncertainty, on their room for maneuver, on their constraints and on their capacity to cooperate in the space of the housing, work, leisure or mobility. I can vary the focus, the 'granulometry', or the scale. All these terms are equivalent here, from observing a family or a household of a few people (microsocial scale) to an organization or a system of action with several hundred or several thousand people (mesosocial scale of observation).

All of these scales, from microindividual to macrosocial, are relevant. No one scale of observation is more accurate than another. It is just that it is not possible to observe everything at the same time, i.e. both the movement and the stability of a social phenomenon, its dynamics and its structure, the strategies of social actors and the building of their identity, or the effects of the situation and those of causality linked to a statistical correlation outside the situation. Quantum physics, taken as a metaphor to understand the limits of the constraints of observation, confirms it is impossible to observe both a particle's position and movement. There is no global approach to reality. All interpretations are, therefore, limited. They are relevant and generalizable at the chosen observation scale and according to the 'decoupage' (Desjeux, 2022) of the system made at a given scale.

In ancient Greek, theory “*θεωρία*” means observing – which is my second method for conducting inductive research. Observing means describing; however, describing is already inter-

preting. The impossibility of distinguishing between description and interpretation explains why I gather many of my observations as a system of action. A system shows the links between the elements constituting the observed phenomenon. This second system method is adapted to observing interactions between actors within a dwelling, an office, a workshop, a large organization or a system of action such as a market, a public policy, a charity, a neighborhood or a village. When the situation changes, the game between the social actors changes. A collective action system is, therefore, both stable and unstable. The explanatory causality is not a correlation but a situational effect.

In terms of method, the critical thing to remember is that observation does not exist in itself. Certain phenomena appear at a given scale and disappear from observation at another scale. The unstable and contradictory interplay of collective actors is often invisible at the macro-social and individual scales of observation. Moreover, even if one is on the spot, it will not be possible to observe everything, as I was able to watch in research on the practice of bathrooms, which in certain cultures is a private practice that cannot be eyed and which in others, as in peasant China, is a joint practice that can be observed. The observation of the same phenomenon differs according to local traditions. This also means some data that will be used to describe the social practices we are trying to understand are reassembled. This is why it is essential to conduct interviews at the location of the practice we wish to explore, for the reliability of the data collected is much better.

This also means observation is not independent of the tool used. The results of the research are dependent on the angle of observation. In this sense, in the human sciences, there are only biases that depend on the situation in which the actors are engaged, and the angle chosen, or imposed by the situation, to observe them or participate in their daily life. Bias is therefore not considered here as a weakness but as one of the conditions of *in vivo* observation, unlike *in vitro* experimental sciences, which seek results independent of situational effects.

The third method of observation is that of itineraries. It consists of observing the event that triggers an action or a decision that will lead to a whole series of steps, a social process that will unfold over time to buy a consumer good, carry out a collective task or reach a public policy decision in limiting pollution and promoting sustainable consumption, for example (Miller, 1988). A few years ago, I showed how children manipulated their parents to obtain the consumer goods they wanted, such as cola or sneakers, when their parents went shopping. They pressured their parents by insisting their request be included in the shopping list.

This itinerary was reconstructed thanks to a technique of information gathering, the four-hour focus group. In this case, the reality was not observed at the place of practices but was reconstructed from the discourse, the description and stories about these practices. For other itineraries, I could follow people from home to the supermarket and thus reconstitute their system of shopping decisions under the constraints of purchasing power or the pressure of family norms.

All I know at the start of the research is that there is a before and after between two actions. It is, therefore, possible to observe stages and paths from a triggering event to the end of the action, even if the process, the itinerary that will be recreated, is never linear and well organized. Each social phenomenon includes a triple material, social and symbolic dimension that I should distinguish to facilitate the observation and the description. Inductive does not mean that the researcher has ‘nothing in his head’, but that they have the tools to create reference points in an unknown universe. It also means that more than a single observation period is needed and that it is necessary to accumulate several field studies to interpret a social system.

Today, part of the observation of itineraries goes through the internet following the confinement linked to the COVID-19 crisis. The observation of consumer practices in France over the last 30 years has shown that the home has become a ‘digital domestic hub’ in which it is possible to produce, buy, consume, sell and play, all thanks to the internet. This conclusion is the result of a whole series of observations over a long time, which began without knowing what all these descriptions of the itineraries of purchasing practices would lead to such or such results. It is the accumulation of observations that will allow us to understand the evolution and the meaning, here, of consumption as a tension between generations, as one of the means of creating social links, as an analyzer of the differences between social classes, as a means of identity construction and as an analyzer of the transformations of the use of domestic space. The increase in digital services, in turn, brings to light households’ dependence on the supply of electricity and, therefore, on fossil energy. Logistics and power are taking on new importance in the household supply system of consumer goods. This result was not foreseeable during my consumer surveys in the early 1990s.

This means that, when a social phenomenon is observed and described, the meaning that can be credited to it is often unknown. This paradox is more valid when one observes a phenomenon in a culture that is not one’s own, as I have experienced in China since 1997. In the beginning, I described, without understanding, objects in spaces like the kitchen or the living room. I gradually showed how the Chinese explained their uses and how consumer goods were analyzers of daily life and social interactions. Then, thanks to these observations accumulated over 10 or 20 years, I understood later, by changing the scale of observation, that we were witnessing the rise of the Chinese middle class and the power of China, and eventually a geopolitical crisis whose effects are visible today (Desjeux, 2018a).

The fourth method is life cycles linked to age and the school system. This method makes it possible to reconstitute the construction of the identity of children, young people and then grown-ups from the evolution of the purchase of clothing, alcohol, food products, video games or any other object or consumer goods (Belk, 2003). It makes it possible to show the importance of the group of pairs in the choice, for instance, of clothes, shoes, backpacks, hairstyles, music or the type of sport to practice. By having the interviewee reconstruct the life history of an object, it is possible to show how each item of clothing, for example, is a marker of one’s age and identity. Its meaning evolves according to whether the person is in kindergarten, elementary, secondary, high school or university, depending on whether he or she has been there and then at work or retirement (Belk, 1988). The objects of consumption are the markers of the entry, the belonging or the exit of each stage of the itinerary. These stages must be observed and described from an emic point of view, that of the actors, and not from an *a priori* definition as in macrosocial or macroeconomic statistical surveys.

Observing is the primary tool, but it is not always possible to ‘see’ all practices. So observing includes several techniques, such as participant observation, ‘floating observation,’ action site interviews, group facilitation, video, photo, photo elicitation and remote interviews. These different methods organize the way of searching for information thanks to information-gathering techniques centered on the actors’ practices and not their opinions.

## PARTICIPANT OBSERVATION: OBSERVING, DISCUSSING, DESCRIBING TECHNICAL ITINERARIES, WRITING GENEALOGY AND BEING TOLD STORIES OF ‘WITCHCRAFT’

When I arrived in Congo in 1975, I had read most of the books about the country. I was knowledgeable about the ‘lineage mode of production’. This being said with humor, because when I arrived in the village of Sakamesso (Congolese Pool area), where I was to spend nearly four months thanks to numerous stays between 1975 and 1979, I did not find evidence of the ‘lineage mode of production’, but men, women, land with cassava, market gardening and corn, mud brick huts, tin roofs and a Protestant temple. Nothing in the academic literature had prepared me for this destabilizing encounter with an unknown world. I had to start from scratch thanks to the help of a young farmer, Antoine Kihindu, and a young man, Ferdinand Ndudi, from the Pool region but living in Brazzaville, who served as my interpreters and informants (Desjeux, 1987).

I felt more helpless because my initial training was not in anthropology, but in the sociology of organizations I had learned from Michel Crozier and Erhard Friedberg between 1969 and 1971, thanks to research into French industrial policy and the network of a large state civil servant group, that of the ‘corps des mines’.

To create landmarks, I began by observing what was visible; i.e. the soil, by going with the peasants to the lowland fields for market gardening cultivated in pre-cooperatives, the forest fields for manioc, the hilly fields for groundnuts, the house fields for traditional vegetables and the orchards for fruit trees. I take many notes in French in a notebook. I write down expressions in Sundi, the village language. I draw a map of the village

By talking to people daily, I came to understand that lineages and families possess these fields; some parcels are not cultivated because they lie fallow. Access to the land is, therefore, challenging and uncertain. This is why the lineages organized a ‘land tontine’ that allowed each village member to cultivate land yearly. At the same time, I reconstructed, through observation in the fields, the technical agricultural itinerary of the cassava. It is the essential food crop for the peasants. It requires cutting down the forest’s trees and then burning them to produce, thanks to their ashes, the potash necessary to cultivate cassava. The men cut the woods and set it on fire. The women then make mounds and plant the cassava cuttings in them. The women will harvest them for two years once the roots have matured.

I therefore showed through observation, the importance of bioenergy; that is, the human energy of men and women, the logistics of transporting cassava from the fields to the village by the women, and the setting of the roots in water to remove the hydrocyanic acid, which is a deadly poison.

I thus reconstructed, inductively, by observation and description, the cassava production process and the sexual division of labor. I could later transfer this ‘itinerary method’ to observing Western and Asian housing. The fields of forest and lowlands would therefore be replaced by the kitchen, the bedrooms, the office, the garden, the living room and the bathroom in the domestic space analyzed as a ‘terroir’. The technical agricultural itinerary will be replaced by the itinerary of shopping and decision-making processes within the home. The rhythm of the weeks punctuated by shopping at the supermarket will replace the rhythm of the two dry and rainy seasons.

Still talking with the farmers, I discovered a kinship system that was utterly unknown to me because it was matrilineal. At first, I did not understand how the fathers were not the heads

of the lineages and how their children did not belong to their families. Still exchanging with people in the village, reading anthropology books on kinship, and being helped by a colleague and anthropologist friend, Annie Lepalec, I learned to reconstruct on several dozen A4 sheets of paper family genealogies of several hundred people starting from an individual called 'ego' in anthropology. Little by little, I learn to find my way in the filiation, the marriage, the residence, the rituals of everyday life (Otnes and Lowrey, 2004; Wallendorf and Arnould, 1991), and especially the access to the land. The links between kinship rules, the family strategies of alliances and access to the ground begin to make a system. The mother's brother is the head of the family. He manages access to the land. He is the one who has the memory of the family linkages that condition the inheritance and the money of the lineage to finance dowries and, therefore, the alliance. In a matrilineal system, the maternal uncle is the head of the family. He is supposed to possess the power to protect family members from witchcraft aggression and punish them with witchcraft if they disobey family social norms.

At the beginning of my research into the village system of the Sundi peasants in the Congo Pool, I did not want to work on witchcraft because I felt too rationalistic to understand this symbolic phenomenon. As my research unfolded, the magic-religious dimension imposed itself on me as a central phenomenon, as a symbolic tool for managing power relations between lineage chiefs, youth and women around managing a zone of uncertainty, illness and death. People have even told me about witchcraft in Brazzaville, far from the village. Witchcraft cannot be observed. It is said, but never within the village, because it could turn against the person who speaks of it.

I understood little by little that witchcraft was a model of explanation, in the imagination, of the misfortunes of everyday life. It gives meaning to the inexplicable. Nevertheless, it is also a symbolic means of strategic management of power relations between lineage chiefs and their family members or between members of different lineages. It is a means of managing conflicts over access to land, access to women, or access to the human energy needed to work the fields, which determine the food supply and, therefore, the survival of families. It is a means of social control based on the fear of uncertainties that weigh on health and life. Consequently, I intuitively transposed to witchcraft what I had learned about power relations in organizations that are organized around areas of uncertainty linked to access to information or unforeseen breakdowns that disrupt the system of action.

This confirms that inductive observation does not mean the researcher has 'nothing in his/her head'. The same thing that will allow him/her to transpose a model observed in a given culture to another culture, such as the model of power relations organized around zones of uncertainty, which was inspired by French research conducted by Michel Crozier in the 1960s, or the model of itineraries, which was inspired by the technical practices of Congolese farmers, will be transposed to the functioning of households in their American, European or Chinese domestic space.

This also shows that learning to observe is like learning by hand. We discover from master artisans, colleagues or people who help us understand from the inside the cultural, social or technical otherness, which largely remains inaccessible to us. At the same time, we will see, as outsiders, what insiders can no longer see.

Observing is to accept to be destabilized and, therefore, to accept the stress linked to the unknown. It means accepting to improvise, not to understand everything, to grope, to make mistakes and to admit that the final system that will be described reflects only a part of reality, that this reality is accurate and generalizable but in a limited way. The term 'limited generali-

zation' means that what is observed can be found in other societies and situations and that the phenomenon is not unique (Desjeux et al., 1998).

This is why the proof that a description is accurate is not based on a frequency or a percentage but on the diversity of the practices observed and the functioning of the social mechanisms highlighted by the observation, whether they relate to power relations or identity construction. What is generalizable is the diversity of the observed occurrences. It is possible to generalize that there are two or three ways of planting cassava cuttings, and we can be reasonably sure there will be fewer than four or five in the same region. Discovering one or two more in new field studies may be possible. The strength of qualitative observations is that they show the diversity of what exists. Weighting by percentages is not truer. Solving specific problems, such as budget allocation, is more practical. Above all, it is perceived as more 'legitimate' in terms of receiving research results.

Inductive observation, under time and budget constraints, is a challenging method. It requires the researcher's sensitivity, his/her methodological imagination, his/her ability to adapt to unforeseen events, to unknown people, and to change information-gathering techniques according to the evolution of the observation situation, such as going from an interview with one person to a group discussion with 10 or 15 people in the evening around a fire. It requires the researcher to be rigorous when collecting information by noting details without selecting what does not seem important today, but which may be useful tomorrow to understand reality. Today, methodological rigor is all the more important because observations are short duration. Therefore, it is impossible to introduce corrections or new elements, as can be done in long-term observations.

## SHORT-TERM OBSERVATIONS IN THE PLACE OF PRACTICE: OR HOW TO CREATE LANDMARKS IN AN UNKNOWN UNIVERSE

When one is in a foreign culture and with a language that one does not know, the most appropriate way to create reference points is to start from the material objects and the spaces in which these objects are used, as I was able to show in the case of Congolese village society. This is why, when I began my research in China in 1997, I created a more systematic framework of observation that integrates a form of floating observation in the street and inside the dwelling, taking photos or videos and interviews on the social uses of objects in the different rooms of the place (Sunderland and Denny, 2007; Mariampolski, 2006; De Waal Malefyt and Morais, 2012; Sherry, 1995).

In China, thanks to Li Hua Zheng, I was able to conduct research in the middle class most often, but also in poorer populations. I conducted research for L'Oréal with Xiao Min Yang, and a whole Chinese team of French teachers, and in the upper middle class, thanks to research for Chanel with Lei Wang, at the time a doctoral student at the Sorbonne. Before entering the apartment of a Chinese family – very often a couple with only one child and possibly with the in-laws of either the husband or the wife – I would take several photos of the neighborhood to indicate the social and environmental context of the dwelling. I then photographed the front door, the mailboxes, the staircase and the walls, which allowed me to reveal the level of electrical equipment in the home. At the beginning of the 2000s, the electrical wires and water inlets were visible. Later, as Chinese incomes increased and aesthetic tastes evolved, the cables were hidden and hanging lights replaced the neon tubes.

During the rest of the survey, for each apartment, I would take a series of photos, one after the other, of each wall, the ceiling and the floor, in each room. Taking pictures would allow me to make new observations and ask new questions about particular objects that I may have yet to notice the presence or importance of when I first investigated. I could also use the photos as stimuli to get the interviewees to talk about what objects are on the walls or in the room, since I do not know what I am looking for and therefore need to understand what is indispensable to look at in the home.

I can then ask the interviewees what objects are the most important for them or what the uses of this or that object are. Thanks to a series of observations between 1997 and 2010, it was possible to see the emergence of mass consumption in China, as it had emerged in 1920 in the United States and the 1950s/1960s in Western Europe. Shopping malls have multiplied. The supply of beauty products has exploded. We find them in the bathroom in the form of shampoo, skincare, eye care, lip care or body care products. Kitchens have become more extensive. They are equipped with refrigerators, stoves, sterilizers and microwaves. In the living room, leather or fabric sofas have replaced wooden ones. The number of pillows in the bedrooms has increased to the American bed pattern.

All these objects are analyzers of daily life, day-to-day practices and the tensions between generations. Members of the older generation are opposed to makeup and modern body care. They are also analyzers of gender relations, the rise of homosexual relations and beauty products for men, and even the questioning of the relative equality between men and women after the revolution of 1949. All that we can retain is that reality does not give itself to see at once and that it emerges progressively from observations that gradually become cumulative and make sense for the academic or professional researcher.

## CONCLUSION

These observations, summarized here, represent a series of observations at ground level, as close as possible to Chinese material culture over more than 20 years. They have mobilized many techniques of information gathering. We had to observe, share people's lives, interview, take many notes in small notebooks, animate groups of consumers to capture their imaginations, take pictures, make videos, watch street scenes without having a precise objective, and learn a minimum of Chinese to enter the culture of everyday life. This information-gathering technique will also be used in Brazil, the United States, Africa south and north of the Sahara, Singapore, Taiwan, South Korea, Guadeloupe, Israel, Spain, France, Denmark, Poland and Great Britain. Most of these qualitative field studies were made under contracts with big companies, departments and NGOs. My teams and I were free to use all methodologies we wanted to use. Confidentiality was the primary mandatory constraint. The main difference with an academic survey is not in the observations or the quality of the data collection but in the expertise to conduct qualitative surveys in a short time. This is why these methods are adapted to short surveys of a few days to a few weeks, or even a few months for some, well below the time of surveys based on participant observation. This is why they are most often carried out with the help of researchers working in the country, with whom it is possible to understand a minimum of all these everyday cultures.

All this means that observation is a complex, demanding method that requires energy. It needs to deal with positive or negative emotions due to the importance of human contact.

Reflection on observation also shows that this method is a mobile object that can disappear and appear as the situations of research progress. It is possible to make observations before the emergence of a phenomenon, as in the case of the rise of mass consumption in China and Brazil, during its realization, as in the case of observations on the practices of daily life and on social movements that I have observed in the United States, Brazil or France and that are the analyzers of tensions between social groups or between social classes; or afterward, as is often the case when a client seeks to understand why his rural development project, his public policy, his consumption good or his service is not developing as expected in a given population. Not everything is observable. Some of the observations are the result of *a posteriori* reconstruction. This is why it is crucial to cross-reference testimonies in order to objectify the phenomenon under analysis.

One of the ways to objectify is to focus on practices and objects and then, after, observe social interactions and the imaginary. Observation also makes it possible to reveal the gaps between representations and practices due to the existence of three series of material constraints linked to space, time, purchasing power, the system of concrete objects and energy, but also social constraints, such as group norms, learning difficulties, the influence of pre-digital social networks, the mental load, or symbolic constraints when they affect the identity of the actors or the risks perceived about an object. These three sets of material, social and symbolic constraints explain why some decisions and practices do not correspond to the values, the imaginary or the social actors' representations. Observing everyday life through objects has made it possible to bring out these different constraints to explain the success or failure of innovation processes, the refusal or acceptance of a change in society, and decision-making in organizations or the family.

Qualitative and inductive observation requires hybridizing information-gathering techniques because grasping reality is uneasy. In this sense, it is similar to archaeological research, which must reconstruct the functioning of hunter-gatherer societies from a few bones, pieces of pottery or flints without access to all of the elements that make them up. It is necessary to play between the objects, the spaces, the logistics, the energy, the games of actors, the relations of power, the meaning, the imaginary and the identity. Most often, social reality can only be seen through clues. It is only visible for short periods. It becomes invisible by changing the scale of observation. It follows a dynamic that of itineraries or life cycles. To observe is to improvise. Observing is describing and creating reference points in an unknown, 'exotic' world.

This is why the observation method proposed here is part of a 'strategic anthropology', an approach that looks for stable structures under the diversity of appearances and for movement through the actors' strategies under situational constraints. It means that we cannot observe both movement and stability simultaneously, nor the chain of causality from the micro to the macro at a glance. To describe is to bring out, little by little, a triple system of objects, actors' games and representations. Observing requires a mobile knowledge that adapts to reality more than to *a priori* definitions. It is to accept that each description is provisional, that specific observations are impossible, and that there is no global approach to reality. Nevertheless, it is possible to capture pieces of truth in the puzzle of life in society so that we are not condemned to fake news and conspiracy theories to explain society.

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## 24. Using diaries as qualitative data

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Saturday, June 20th, 1942

Writing in a diary is a really strange experience for someone like me. Not only because I've never written anything before, but also because it seems to me that later on neither I nor anyone else will be interested in the musings of a thirteen-year-old schoolgirl. Oh well, it doesn't matter. I feel like writing, and I have an even greater need to get all kinds of things off my chest.

— Anne Frank, *The Diary of a Young Girl*, 6

### INTRODUCTION

The word ‘diary,’ derived from the Latin *diārium*, from *diēs*, day (*Chambers Dictionary of Etymology*, 2008, 275) can be understood as a ‘daily record of events’. Its significance, however, goes much beyond that of registering one’s experiences, feelings or struggles. From the intimate ‘Dear Diary’ with whom we share our dreams and hopes as children, to the professional planner that keeps track of our responsibilities, or the casual journal in which we reflect upon the events around us, diaries afford diarists a variety of benefits. They keep hold of our past and of our dreams for the future, they help us to make sense of inner feelings and events around us, and to cope with adversities, as well as to celebrate achievements. In this sense, diaries offer a site for introspection (Belk, 1992) and self-learning (Radcliffe, 2018), and can be therapeutic (Hymer, 1992). As the opening quotation conveys, they can hold insights of lasting importance into human nature, even if this is far from the diarist’s mind at the time of writing. All of these properties make diaries a valuable tool for researchers in social sciences. This is especially the case given that diarists are often emotionally invested in the process of recording their thoughts and thus to produce richer data than those obtained from abstract questions more common in other methods of data collection.

Diary-based methods are well established in many fields within social sciences. They have been used extensively in psychology (Laurenceau and Bolger, 2005), education (Baker, 2021), health (Jones, 2000), management (Radcliffe, 2013), tourism (Puhringer and Taylor, 2008), feminist studies (Patterson and Hogg, 2004) and, increasingly, in consumer studies (Branco-Illodo et al., 2023). In this chapter, we focus on diaries as a source of qualitative data in consumer research. In doing so, we consider the novel opportunities afforded by communication technologies to advance data collection (Cassell et al., 2018) through diaries.

Through this analysis, we consider typical conceptualizations and uses of diaries in consumer studies. We first situate diaries within the broader field of ‘personal life records’ (Jones, 2000, 555). We then examine uses of diaries in qualitative research, addressing the benefits, challenges and processual requirements therein. Following this, we propose broadening the application of diaries to include self-reported, imaginary experiences and consider the potential of these *fictional* or *fantastic* diaries to inform consumer-behavior scholarship. Looking

forward, we consider how technology can advance this agenda and enable new applications for diaries. Throughout the chapter, we further address ethical issues in qualitative diary research.

## DIARIES: A WINDOW INTO THE PAST

Diaries, along with letters and memoirs, constitute personal or autobiographical documents, which guide readers around people's experiences, emotions and beliefs (Belk, 1992; Jones, 2000). These personal records provide a rare window into the past, capturing insights into the everyday activities of ordinary people (Burgess, 1981), and the phenomenology of their lives (Belk, 1992). As such, they are a rich source of information for biographers and historians, offering first-hand descriptions of events and elucidating on how prevailing ideas and beliefs changed through history (Day and Thatcher, 2009; Heehs, 2013).

The act of keeping written notes to remember things dates to ancient Greece, while noting down more personal matters was recommended to Christian monks in late antiquity, as a way of keeping account of, and preventing sins (Heehs, 2013). However, being written for personal use and on wax tablets, these proto-diaries have not survived (*ibid*). The earliest surviving diaries date from the eighth-century in Japan (*ibid*), which has maintained a continuous tradition of diary writing ever since. In Europe, the earliest extant diaries are found in sixteenth-century England, written by Puritans accounting for the states of souls, much like the earlier monks (Heehs, 2013). A couple of generations afterwards, Samuel Pepys, an English naval administrator and Member of Parliament, began the diary that would become an invaluable historical source for the social and cultural lives of London's elite (Heehs, 2013; Bartlett and Milligan, 2021). Later diaries would provide insights into the inner lives of people who would otherwise be invisible to history, such as the New England midwife Martha Ballard (1785–1812), and Anne Frank, in hiding during the Holocaust (Bartlett and Milligan, 2021). Thus, diaries can help uncover truths hidden by dominant narratives such as the fear and doubt of young Kamikaze pilots (Ohnuki-Tierney, 2007), in contrast with what was presented in both Japanese Imperial ideology and Western media.

Letters and memoirs can fill a similar role for historians and other social scientists to diaries, being first-person genres that offer the readers a privileged access to the writers' selves, feelings and experiences (Heehs, 2013; Fort, 2022). However, while diaries are usually written mostly for the diarist, memoirs and, in particular, letters, often have a specific reader(s) in mind (Belk, 1992), which may affect what is said and how. These have both been used to great effect by researchers into historical uses of consumption. Particularly notable in this context are Belk (1992) and Klein et al. (2015). Belk (1992) used letters (along with diaries and other sources) to uncover how mid-nineteenth-century Mormon migrants in Utah used possessions to create meanings. Similarly, Klein et al. (2015) considered survivors' memoirs to study how inmates of Nazi concentration camps gave and received gifts to re-establish the identities that had been stripped from them. There is great potential of using personal life records as a way of learning from the past, although this approach has been underutilized in consumer research (Klein et al., 2015).

## DIARIES AS A TOOL FOR RESEARCH IN PRESENT TIMES

Diaries are also an effective tool for understanding contemporary phenomena. ‘Solicited’ diaries are completed at the request of a researcher (Jones, 2000), with a specific purpose (Bartlett and Milligan, 2021) in mind. They enable recording cognitive, affective and social dimensions of everyday events with relatively little inhibition or filtering. Their data emerges from natural life contexts rather than artificial settings (Ohly et al., 2010) and, thus, can offer good proxies of ‘life as it is lived’ (Bolger et al., 2003, 579). These data include descriptions of sensations, experiences, patterns of behavior, but also insights into participants’ interpretations of those events and meanings associated (Day and Thatcher, 2009), all gathered with minimal involvement of the researcher (Alaszewski, 2006). Thus, diaries can capture some of the ‘most fascinating little events of everyday life’ (Wheeler and Reis, 1991, 351), offering rich context to the researcher (Bolger et al., 2003) about the phenomena under study from the perspective of participants.

Importantly, because diarists are asked to record events shortly after their happening, the need for retrospective recall (Day and Thatcher, 2009) and the risk of memory lapses and cognitive distortions are minimized (Bolger et al., 2003; Radcliffe, 2013; Tidwell et al., 1996). As such, diaries may produce a more accurate representation of events (Day and Thatcher, 2009) than conventional retrospective methods (Bartlett and Milligan, 2021). Likewise, they allow us to explore changes in consumers over time, including variations in interests, social and emotional circumstances and identity turns (Gallage et al., 2020). In this sense, they are a good tool for gathering longitudinal data, allowing participants’ stories and their fine details to unfold (Barrett and Milligan, 2021). This makes diaries particularly useful to investigate customer journeys (Becker et al., 2020) and other temporal dimensions of phenomena (Heath and Nixon, 2021).

In writing a diary, diarists’ relationship to the researcher is more distant than in an interview. Diarists are not talking directly to researchers, or at least they may not perceive that they are. People are in the habit of viewing a diary as a confidante. This allows participants to open up and feel more at ease to volunteer information, emotions and details they would not otherwise do. This makes diaries particularly useful to access knowledge on sensitive issues that may be hard to investigate (Cucu-Oancea, 2013) by other methods but also raises some ethical issues that we will consider in the next section.

In part due to its potential to engage with, and adapt to, digital culture (Bartlett and Milligan, 2021), diary research has received increasing attention from consumer researchers (Burton and Nesbit, 2015; Patterson, 2005; Wohlfeil et al., 2019). However, the use of diaries in qualitative studies in marketing remains relatively scarce (Patterson, 2005; Radcliffe, 2013).

### **Challenges of Using Diaries in Consumer Research**

Despite the numerous benefits of using diaries in research, it also presents challenges. The limited involvement of the researcher in the diary process (Alaszewski, 2006) affords participants choice and control (Bartlett and Milligan, 2021) but reduces the researchers’ opportunities to probe for further information (Radcliffe, 2013), oversee missing diary entries or otherwise shape data collection (Bartlett and Milligan, 2021).

This can be especially challenging because the high commitment required from participants in terms of time and effort (Bartlett and Milligan, 2021; Bolger et al., 2003; Burton and Nesbit,

2015) necessitates continuous encouragement to keep them motivated, clarify potential queries (Radcliffe, 2013), or assist them in completing missed entries (Day and Thatcher, 2009; Bolger et al., 2003). Failure to do so may result in poorly filled diaries or in diarists quitting the study. However, such prompting can have the downside for researchers of reminding participants that they are writing for readers and not purely ‘to the diary’. On the other hand, taking advantage of the illusion of a private diary may raise some ethical issues that reminders of the researcher’s presence can alleviate. Maintaining the right balance between leaving the participant entirely unsupervised and becoming intrusive with encouragement is largely a matter of judgment and experience and should take into consideration the characteristics and attitudes of each diarist.

Diaries can generate other ethical tensions such as that of potentially manipulating participants to disclose sensitive information. It is important for researchers to acknowledge such issues and take precautions. Protecting the anonymity of participants and other people mentioned in the diaries needs to be taken especially seriously (Bartlett and Milligan, 2021). Conversely, and given that this method is used to access especially sensitive information, there is the chance that participants reveal information that needs to be shared for their safety or that of others. Developing a clear set of guidelines as to how to deal with this possibility in advance may well be appropriate.

Participants may delay completion of their diaries and, thus, undermine their benefit of little retrospection. As with other methods of data collection, there is also the risk that diarists romanticize or glamorize past events, conceal relevant experiences or feelings (Allport, 1942), or give accounts they deem as socially desirable. As people may express themselves more freely online than in person (Suler, 2004), digital options can lessen some of these problems; however, digital platforms also bring other challenges, such as that not everyone has internet access or skills in computer use (Ohly et al., 2010), which can lead some voices (e.g. those of the elderly) to be silenced.

## **Diary Processual Requirements**

In order to ensure rigor in collecting data from diaries, and to maximize their potential benefits, researchers may wish to take a set of considerations into account prior to, and during, their use. As discussed by Filep et al. (2018), it is important to consider the rationale for using this tool and offer a clear account of its usage. Researchers should base their specific choice of method on the phenomena under investigation, the aims of research, the purpose of the diary within the study and the type of participants who will be keeping it (Bartlett and Millard, 2021). This information will affect the platform used for keeping the diary, the frequency and timing of reports, the procedures taken to keep participants motivated and the decision of whether to combine the diaries with other methods of data collection. We discuss this in the following.

## **Type of Diary Report**

Until recently, pencil-and-paper diaries were the most common form of diary keeping (Bolger et al., 2003), where participants filled one or more booklets (Ohly et al., 2010). This option has been more popular amongst older participants or those who are less familiar with technology (Bolger et al., 2003; Green et al., 2006). However, nowadays, most participants may favor an electronic format, using online platforms such as Google Forms (Branco-Illodo et al., 2020),

as a matter of convenience and accessibility. Furthermore, scholars and practitioners have been searching for approaches to record diary data that are more inclusive and that consider the needs of different people, including any physical, cognitive and intellectual impairments affecting diarists' ability to complete their diaries (Bartlett and Milligan, 2021). For example, keeping a voice-recorded diary can minimize effort (as most people are faster talking than writing or typing) and can overcome participants' limitations in writing (Burton and Nesbit, 2015), whilst allowing the researcher to gather more complete and accurate data. This was the case of Williamson et al. (2015) who showed how audio diaries facilitated the production of richer data about mothers' experiences of breastfeeding by allowing them to record their thoughts during rather than after feeding sessions. Similarly, researchers have successfully used video diaries, which allow participants to engage actively in the investigative process and reflect upon their own experiences (Brown et al., 2010).

Whenever possible, researchers should consider what adjustments in the diary research design would make the process more inclusive (Mueller et al., 2023). This requires both sensitivity and flexibility from researchers in continuously adapting the design to changing circumstances of participants' lives, for example by allowing them to switch between online and paper-and-pencil formats when experiencing difficulties with technology or upon becoming ill (Branco-Illodo et al., 2023). By offering participants the choice of different diary-recording platforms – for example, between a pencil-and-paper diary or an electronic one – researchers maximize diarists' convenience and reduce the likelihood of dropouts (Clarkson, 2008).

In any case, diaries can range from strictly structured reports, in which diarists are expected to follow tight guidelines, to free-form accounts, where participants choose their own content within the theme of the study (Baron et al., 2006; Jones and Woolley, 2015). Some studies suggest that providing instructions can increase the commitment and clarity of diary data (Green et al., 2006), whereas others suggest that rigid instructions can stifle the diarists' creativity and limit their personal insights (Baron et al., 2006; Patterson, 2005). While too much structure can become a 'straitjacket' (Patterson, 2005, 145), too little can result in poor, limited or less relevant data.

### **Frequency and Timing of Reports**

Diary studies can be classified into three types, namely: *interval*-contingent diaries, where participants make entries at regular intervals (e.g. every evening); *signal*-contingent diaries, responding to the request of the researcher; and *event*-contingent diaries, completed every time a specific event (Wheeler and Reis, 1991) or a predefined triggering incident occurs (Bolger et al., 2003). For example, Gallage et al. (2020) used event-contingent diaries, with participants asked to fill in the diary every time they encountered an alcohol-infused environment.

The time range of keeping diaries varies, with researchers having used both periods as short as five days (Ohly et al., 2010) and exceeding one year (Bartlett and Milligan, 2021). It is important to remember that either keeping a diary too long or asking participants to complete too many entries within a short span of time may lead to response fatigue (Bartlett and Milligan, 2021) and degrade the quality of the data collected. However, in some contexts, such as prolonged crises, like the COVID-19 pandemic, collecting qualitative diaries data 'over months rather than weeks' may be particularly valuable to understand how the crisis unfolded (Mueller et al., 2023, 2).

## **Keeping Participants Motivated**

Keeping diarists engaged is an important yet challenging task (Bolger et al., 2003; Patterson, 2005). This may require providing diarists careful guidelines about how to fill in their diaries (Alaszewski, 2006), reassuring them of the importance of their insights, and allowing them to make decisions that better suit their preferences in relation to how to record and share their data (Mueller et al., 2023).

Regarding the clarity of guidelines in electronic diaries, we find particularly helpful to concentrate all relevant information for participants on a single, dedicated website, which may include instructions, the online diary link and researchers' contact details, amongst other aspects. This was done in the studies reported in Branco-Illodo et al. (2020) and Gallage et al. (2020), which helped diarists to report issues and the researchers to make subsequent adjustments. Incentives can also keep diarists motivated (Alaszewski, 2006). This could mean paying them directly or making a charity donation on their behalf (Wenemark et al., 2010). This can, however, raise ethical issues, especially when researching sensitive topics or vulnerable participants; diarists may feel pressured or constrained to complete the diaries for the full duration of the study, even when feeling uncomfortable or mentally unprepared. Equally, financial incentives may attract participants who are not especially invested in or knowledgeable about the phenomena under study.

While incentives assist recruitment and completion, sustained commitment to generate rich insights requires making the process as convenient as possible by providing good instructions and keeping ongoing contact with participants in a personal yet nonintrusive manner (Clarkson, 2008). Supporting participants' engagement with their diaries in this way can build joint rapport and support diary completion through the full period. For example, in a study about coping with gift failure (Branco-Illodo et al., 2020), the lead author exchanged more than 200 emails with diarists, replying to their questions, thanking them for the pictures they shared and assisting them on personal issues affecting the data collection (e.g. being ill, being busy) during the four-week diary-keeping period. All emails were personalized with the messages tailored to each receiver. Four years after the initial data collection, more than half of the informants that she was able to reach again were happy to be part of a subsequent interview without any incentive. This suggests the importance of developing a trusting relationship in longitudinal, qualitative studies, which necessitates dedicated and ongoing commitment to motivate participants and accommodate their personal circumstances. Whilst developing a spirit of collaboration between researchers and participants tends to increase compliance (Green et al., 2006), the example above also indicates that the investment needed in terms of time and effort to develop diary-based research may be greater than anticipated.

## **Using Multiple Methods**

Diaries can be used in isolation or in combination with other research methods such as interviews (Heath and Nixon, 2021), questionnaires (Branco-Illodo et al., 2020; Gallage et al., 2020), focus groups (Grant and O'Donohoe, 2007), and photo or video elicitation (Wohlfeil et al., 2019). They can also be a part of ethnographic or netnographic studies (Kozinets, 2020). By combining diaries with other methods, the researcher can gather information on aspects (e.g. language, facial expressions) that are difficult to capture without in-person communication (Mueller et al., 2023). Solicited diaries tend to be combined with follow-up interviews 'as

a supplemental source of insight' (Arsel, 2017, 939), which offer researchers the opportunity to fill gaps, clarify any incomplete records (Radcliffe, 2013) or access relevant aspects of a phenomenon not captured by diaries (Bijoux and Myers, 2006).

Interviews further allow diarists to share important incidents that were not reported in their diaries because they happened before (or after) the diary-retrieving period, but which participants identified as relevant for the study (Branco-Illodo et al., 2020). Post-diary interviews are fundamental to some diary methods (Kenten, 2010), while pre-diary interviews help to build rapport with diarists, explain expectations and provide instructions (Gallage et al., 2020). Some studies combine the pre-diary interviews with follow-up interviews following the diaries' completion (Heath and Nixon, 2021). This approach can support participants' engagement and allow researchers to piece participants' stories together in great detail. However, this also requires substantial effort from participants, which may be difficult to maintain without a good financial incentive or substantial support from the researcher. In any case, using multiple methods adds an additional layer of complexity to data management and analysis (Bartlett and Milligan, 2021), which needs to be balanced against the benefits gained.

### **Other Applications of Diaries**

Sharing one's inner thoughts on social media can serve as a public facing diary, such as for the novelist Fang Fang in locked-down Wuhan in 2020 (Chen, 2022). Travel blogs have been considered a precursor of online diaries, involving several entries that are linked with a common theme (Puhringer and Taylor, 2008), for example, a trip. Diarists use these to provide 'constraint free' feedback of tourist destinations, interpret their experiences (Banyai and Glover, 2012) and communicate with family and friends (Puhringer and Taylor, 2008). In these cases, the private nature of diaries has been replaced with overt, public disclosure (Belk, 2013), providing public and private personal records at the same time (Bartlett and Milligan, 2021).

More recently, networking services (e.g. Instagram, Twitter/X) have become 'the main electronic technology of the self' and people naturally upload text and pictures to create their online identity (Heehs, 2013, 235). This is what some researchers refer to as 'the "virtual diary" phenomenon', where individuals use technologies as a vehicle for self-reflection, for talking about their thoughts with others and to 'chronicle their lives' (Carú and Cova, 2008, 170). Data gathered from blogs, whilst unsolicited, can still provide relevant insights for investigators, in that they are unobtrusive and rich in capturing the details of interaction with other people (Kozinets, 2020).

Finally, researchers, as well as participants, can keep reflective diaries by recording any observations, gestures, and emotions of themselves or others, as well as any events that are relevant to the study (Kozinets, 2023). These records help researchers to promote reflexivity (Heath and Tynan, 2023), acknowledge researcher-participant power relations, raise awareness of biases and ensure the rigor of the research (Filep et al., 2018).

## **DIARIES IN QUALITATIVE RESEARCH: LOOKING FORWARD**

Collectively, diaries and other personal life records represent a powerful source of rich, qualitative data. They offer a proven tool for gathering authentic information about participants' lives and experiences *as they are lived*. Looking forward, there are interesting opportunities for innovative, qualitative research using diaries, arising both from their potential to capture diarists' imagination and from novel forms of data collection within the digital world.

Diaries can be employed to access diarists' imagination and their deepest fantasies in ways that can be highly revealing for consumer researchers. The multiplicity of new selves on digital platforms (Belk, 2013) expands the traditional notion of research 'participant' and opens new opportunities to access their mindset and behavior in alternative, imagined realities. Diaries of experiences in these realities potentially allow access to hidden dimensions of people's feelings, desires and tensions in relation to the phenomenon of interest.

Consumers search for parallel realities, such as augmented reality, within which they can daydream, fantasize about themselves (El-Shamandi et al., 2023), and engage in magical, mythical or fantastic narratives. The growing imaginative resources provided by digital virtual consumption (Denegri-Knott and Molesworth, 2010) both reinforce the relevance of researching consumption 'in one's mind' (d'Astous and Deschênes, 2005) and require innovative ways of accessing data to capture such elusive and private phenomena. We believe diaries can aid in this process.

Diaries capturing consumers' imagination can reveal novel ways in which consumers attempt to reclaim some form of agency in their lives or in the market, engaging with the stories of enchantment provided by the market (Heath and Heath, 2016), and then rewriting and tailoring them to serve their own purposes. This is akin to James et al.'s (2011, 647) notion of 'chimerical agency', where consumers entwine 'strands of reality and fantasy to create a realm of possibility that is hybrid of the two'. In their study about daydreaming, Heath and Nixon (2021) employed diaries of consumers' daydreams that captured consumers' visions of the future, their aspirations and desires and pure scenarios of fantasy. The study revealed nuances of people's feelings, identities and struggles, which could prove difficult to capture without delving into participants' imagination.

Inquiry into the imaginary world of consumers requires approaching diary data collection in sophisticated and sensitive ways that stimulate diarists' imagination, create space for them to unleash their imaginative insights and provide ways to preserve the privacy of such intimate thoughts. In this direction, diaries could be combined with immersive, digital representations of different worlds to enable participants to reimagine themselves in different, desirable personas (e.g. as a nonsmoker or a less wasteful consumer) and to explore the transformative potential of such fantasies. This approach could also be used to offer insights into other dimensions of consumer behavior (e.g. exploring customer journeys, gift giving experience).

Furthermore, electronic devices (e.g. smartphones, tablets) allow the creation of video, photo, voice or text diaries and enable these different types of data to be easily combined. This can also make diary keeping more convenient for diarists and, thus, enhance their commitment.

## CONCLUSION

In this chapter, we discussed qualitative diary data as a way of looking into the past and we considered new ways of using diaries to inquire about the present or imagined futures. We identified opportunities to usefully employ and shape this rich tool of research in ways that can potentially reveal novel insights into consumers' minds and facilitate desired transformations. With technology changing rapidly and in face of the urgent need to listen to the voices of people with varied abilities and conditions, researchers must be creative and sensitive in order to maximize the potential of diaries as a research method. Importantly, they should do so in ways that are mindful of ethics and of all participants involved.

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## 25. Ethnomethodology and the study of markets

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### INTRODUCTION

This chapter advocates for, and provides guidance toward, the use of ethnomethodology to study markets, market-centered social orders and practices that enable markets. Quite literally, the word ethnomethodology breaks down into ‘ethno’ – the study of people and human behavior – and ‘methodology’ – which refers to the systematic study of methods; therefore, it is the study of people’s procedures as they behave in the social world (Garfinkel, 1967). Rather than focusing on individual traits and psychological factors that underlie human behavior and/or pre-existing social structures and the power regimes within them that enable social life, ethnomethodology emphasizes the practical methods people use to interpret and navigate their social environments. For ethnomethodologists, the social world is a dynamic context made manifest through a set of delicate, often loosely orchestrated performances or practices.

Ethnomethodology is not a specific methodology, but rather a sociological perspective or approach that examines the procedures people employ to create and sustain social order in everyday life (Heritage, 2013). Rather than offering a specific set of research techniques, ethnomethodology provides a framework for understanding the practical methods individuals use in their social interactions (Coulon, 1995). Ethnomethodology focuses on uncovering the micro level details of *how* people generate social order and the shared understandings that emerge from these practical methods and the resulting social orders (Garfinkel, 1959).

Ethnomethodologists typically employ qualitative research methods to study social phenomena. These methods can include participant observation, conversation analysis, detailed analysis of naturally occurring social interactions, and the examination of everyday documents or artifacts. However, the specific methodologies used within ethnomethodological research can vary depending on the research question and circumstances. While ethnomethodology is not a specific methodology with a fixed set of techniques, it provides a fruitful way to study the everyday, often taken-for-granted, practices that underlie lived social order.

### ORIGINS OF ETHNOMETHODOLOGY

Ethnomethodology is often associated with the work of sociologist Harold Garfinkel. Its origins can be traced to a set of seminars Garfinkel organized at the University of California, Los Angeles (UCLA), where he presented his research on the methods people use to generate social order. The seminars attracted a group of like-minded scholars, including Aaron Cicourel, Harvey Sacks and Emanuel Schegloff, who were interested in exploring the study of everyday social practices. Together they developed the theoretical foundations that would later become known as ethnomethodology (Coulon, 1995).

The research conducted by Garfinkel and colleagues challenged the dominant structural-functionalism and symbolic interactionism paradigms of sociology at the time.

They sought to shift the focus of sociological inquiry from macro-level structures (e.g. culture and institutions) and individual psychological processes (e.g. perception, cognition, emotion, learning, motivation and self/identity) to the practical methods (e.g. sensemaking and conversation analysis) and practices (e.g. taking turns at talking and queueing) people employ to interpret social contexts and accomplish their daily activities (Heritage, 2013). In 1967, Garfinkel published ‘Studies in Ethnomethodology,’ which served as a foundational text for the emerging field. The book outlines the central concepts and empirical strategies of ethnomethodology and presented a series of studies that demonstrate the practical methods people use to accomplish social order in various contexts, from elevator riding etiquette to jury deliberations (Rawls, 2015).

Ethnomethodology seeks to understand the social world from the perspective of the individuals involved, emphasizing how people actively interpret and construct their social reality in their day-to-day lives. It aims to uncover how people generate and negotiate through collective action, shared meanings and understandings that enable continual performance of lived social reality (Pollner, 1991). At the core of ethnomethodology is the notion of ‘indexicality’, which refers to the fact that people’s interpretations and actions are context-dependent and tied to specific social circumstances (Atkinson, 1988). For example, a conversation in a library is likely to be conducted in whispers versus a conversation in a classroom where whispering would be inappropriate and voice projection across the room is expected.

Ethnomethodologists examine how people use various cues, signals and resources to navigate social interactions and make sense of the social order. To do so, ethnomethodology employs qualitative research methods, including participant observation and interviews, to study social interactions and practices in natural settings. Researchers strive to uncover the tacit rules and norms that govern social interactions, often focusing on the ‘breaching experiments’ that intentionally violate these norms to reveal the underlying assumptions and expectations (Attewell, 1974). For example, turning one’s back to the doors in an elevator and facing a set of strangers violates the norms, revealing the expectation of detachment that makes the temporary physical confinement of this public space more socially comfortable.

The findings of ethnomethodological research challenge conventional assumptions about social order and highlight the active role individuals play in creating and maintaining it. Ethnomethodology has been influential in various areas of sociology, including conversation analysis, the study of work and organizations and the sociology of knowledge. It has also influenced other disciplines such as anthropology, linguistics and communication studies.

## THE EVOLUTION OF ETHNOMETHODOLOGY

While Garfinkel’s work provided the initial foundation for ethnomethodology, subsequent researchers built upon his ideas and applied ethnomethodological approaches to various domains of social inquiry.

### Conversation Analysis

One significant development in ethnomethodology is the emergence of conversation analysis as a distinct research approach. Scholars such as Harvey Sacks, Emanuel Schegloff and Gail Jefferson expand on Garfinkel’s work and focus on the detailed analysis of naturally occurring

conversations to uncover the sequential organization, turn-taking, repair and other practices that constitute social interaction. Conversation analysis is a prominent method within ethnomethodology and widely used in the study of talk-in-interaction and institutional settings (Watson, 1992).

### **Applied Ethnomethodology**

Ethnomethodology expands beyond its early focus on theoretical analysis and applies to various practical domains. Scholars use ethnomethodological approaches in fields such as healthcare, education, technology design, organizational studies and legal studies. Applied ethnomethodology reveals how to support and sustain existing practices and how to disrupt practices through desired interventions in these domains (Heap, 1990).

### **Organizational Studies**

Ethnomethodologists conduct extensive research on work practices and organizational settings, exploring how people collaboratively accomplish their tasks and make sense of their work activities (Weick, 1988). These studies examine the methods, routines and practical reasoning that workers employ to navigate complex work environments. Ethnomethodological insights influence the field of organizational studies and provided a deeper understanding of the social organization of work (Rawls, 2008).

### **Technomethodology**

Ethnomethodology engages with the study of technology and its impact on social life. Ethnomethodologists investigate how people use and adapt to technological artifacts in their everyday lives, examining the practices that emerge around technology use. This research sheds light on the ways in which technology shapes social interactions and the social organization of various domains and is labeled technomethodology (Dourish and Button, 1998).

### **Sociology of Knowledge**

Ethnomethodology contributes to the sociology of knowledge, examining how people actively construct and sustain knowledge in social interactions. Scholars have explored how individuals collaboratively produce and negotiate knowledge claims, employing practical methods to establish the credibility and legitimacy of knowledge (Maeder, 2018). This line of inquiry provides insights into the social construction of knowledge and the ways in which it is embedded in social interactions.

These developments in ethnomethodology illustrate how the perspective expanded in scope, refined methods and engaged with diverse areas of social life.

## ETHNOMETHODOLOGY AND PHENOMENOLOGICAL SOCIOLOGY

Ethnomethodology and phenomenological sociology share a close relationship and are often considered complementary approaches within the field of sociology. While they have distinct emphases, they both aim to understand social phenomena from the perspective of the individuals involved and emphasize the lived experiences of individuals in social contexts (Psathas, 1968).

Both ethnomethodology and phenomenological sociology prioritize the subjective experiences of individuals in understanding social reality. They seek to uncover the meanings, interpretations and lived experiences of individuals within their social contexts. Ethnomethodology focuses on the practical methods people use to construct social order, while phenomenological sociology emphasizes the subjective experience of individuals and their conscious reflection on the social world (Psathas, 1968).

Phenomenological sociology and ethnomethodology both recognize the importance of the lifeworld – the everyday world of lived experiences and taken-for-granted assumptions – in shaping social phenomena. They seek to uncover the implicit, shared understandings and background knowledge that individuals draw upon in their social interactions. Ethnomethodology focuses on the methods people use to generate social order within the lifeworld, while phenomenological sociology explores the subjective meanings and interpretations individuals derive from their lifeworld experiences (Gubrium and Holstein, 1993).

Both approaches employ qualitative research methods that emphasize detailed observation and analysis of social interactions. Ethnomethodology often utilizes conversation analysis and other micro-analytical methods to uncover the practical methods people use to accomplish social order. Phenomenological sociology employs methods such as in-depth interviews and reflective analysis to explore individuals' subjective experiences, meanings, and interpretations.

Both ethnomethodology and phenomenological sociology challenge objectivist perspectives that prioritize external structures and objective reality. They argue for the importance of understanding social phenomena from the perspective of the actors involved, emphasizing the active role individuals play in constructing social reality. They seek to move beyond a purely objective understanding of social phenomena and incorporate the subjective experiences and interpretations of individuals (Rogers, 1983).

While there are overlaps and shared perspectives between ethnomethodology and phenomenological sociology, they are distinct research traditions. Ethnomethodology focuses on the practical methods people use to accomplish social order, while phenomenological sociology places greater emphasis on subjective experiences and the lived meanings individuals derive from their social interactions. Nonetheless, both approaches contribute to a more comprehensive understanding of social phenomena by highlighting the interplay between individual experiences, social interactions and the construction of social reality.

## THE GOFFMAN INFLUENCE

The connection between ethnomethodology and the work of sociologist Erving Goffman lies in their shared interest in understanding social interaction as the construction of social order.

While ethnomethodology and Goffman's symbolic interactionism approach have distinct theoretical frameworks and methodologies, they both explore the ways in which individuals navigate social situations, manage impressions and create shared understandings in their everyday interactions (Attewell, 1974).

Ethnomethodology and Goffman's work focus on the micro-level analysis of social interaction. They examine the details of face-to-face encounters, the methods people use to present themselves to others and the ways in which individuals actively shape and interpret social situations. They both delve into the processes through which social order is constructed and maintained in everyday life. While ethnomethodology investigates the practical procedures people employ to create social order, Goffman's work explores how individuals engage in impression management, face work and the use of social scripts to uphold social norms and expectations (Treviño, 2003).

Goffman's dramaturgical approach, outlined in his book *The Presentation of Self in Everyday Life* (1959), examines social interactions as akin to performances on a stage. Goffman emphasizes the role of interactional rituals, impression management and the presentation of self in understanding social behavior. Ethnomethodology also recognizes the performative aspects of social interaction and the ritualized nature of everyday encounters (Smith, 2013).

Goffman's work significantly influenced the development of ethnomethodology. Ethnomethodologists drew inspiration from Goffman's insights into the social construction of reality, the role of symbols and the dramaturgical aspects of social interaction. Goffman's ideas helped shape ethnomethodology's emphasis on the practical performances that shape and maintain social order (Smith, 2013).

While there are connections between ethnomethodology and Goffman's work, it is important to note the difference. Ethnomethodology places a greater emphasis on the practices people employ to create social order, while Goffman's work focuses more on the symbolic aspects of social interaction and the presentation of self (Schwalbe and Shay, 2014).

## COMPARING ETHNOMETHODOLOGY TO PARSONS' THEORY OF ACTION

Ethnomethodology and the theory of action represent contrasting perspectives within the field of sociology. While both approaches aim to understand social action and behavior, they differ in their theoretical assumptions and methodological orientations.

Parsons' theory of action emphasizes the importance of social structures and norms in guiding individual behavior. It focuses on how individuals' actions are shaped by societal values, roles and expectations. In contrast, ethnomethodology examines the practical procedures individuals use to construct and maintain social order in everyday life. It highlights the active, ongoing work individuals engage in to generate shared meanings and expectations through their social interactions (Korbut, 2014).

Parsons' theory of action operates at the macro level, seeking to explain social phenomena by examining broad social systems and institutions. It emphasizes the interplay of social structures and their impact on individual action. Ethnomethodology, on the other hand, adopts a micro-level analysis, focusing on the details of social interaction and the practical methods individuals employ in their everyday encounters. It investigates how social order is produced and sustained in the course of face-to-face interactions (Hilbert, 2001).

Parsons' theory of action highlights the role of shared norms and values in guiding individual behavior and maintaining social order. It emphasizes the importance of normative consensus and social integration for the stability of societies. In contrast, ethnomethodology questions the assumption of pre-existing norms and values that individuals consistently rely on. It investigates how individuals actively produce and negotiate norms and meanings through their ongoing interactions (Rawls and Turowetz, 2019).

Parsons' theory of action relies heavily on quantitative research methods and systems analysis to study social phenomena. It emphasizes the use of deductive reasoning and the development of grand theories to explain social order. Ethnomethodology, on the other hand, adopts a qualitative approach, employing detailed observation and analysis of social interactions. It focuses on the analysis of naturally occurring data and seeks to uncover the practical methods individuals use in their everyday lives (Rawls and Turowetz, 2019).

Overall, ethnomethodology and Parsons' theory of action offer different perspectives on understanding social action and social order. Ethnomethodology emphasizes the practical methods individuals employ in their everyday interactions to construct social order, while Parsons' theory of action focuses on the influence of social structures, norms and values on individual behavior.

## THE DIFFERENCE BETWEEN ETHNOMETHODOLOGY AND ETHNOGRAPHY

Ethnomethodology and ethnography are two related but distinct approaches within the field of sociology. While both involve qualitative research methods and share a focus on understanding social phenomena from the perspective of the participants, they differ in their theoretical orientations, research objectives and methodological emphases.

Ethnomethodology is a sociological perspective that focuses on the practical methods and practices people use to construct and interpret social reality. It emphasizes the study of everyday social interactions and the tacit rules and norms that guide them. Ethnomethodologists are interested in uncovering the underlying social order and the methods people employ to make sense of their social world. Ethnography, on the other hand, is a research method that aims to provide a detailed, descriptive account of a particular social group or cultural setting. It typically involves prolonged immersion in the field and relies on participant observation, interviews and other qualitative techniques to understand the cultural meanings, practices and social dynamics within the researched context (Ten Have, 2003).

Ethnomethodology aims to examine the processes through which social order is constructed and maintained in everyday life. It seeks to uncover the methods, practices and assumptions people use to generate shared meanings and understandings. Ethnomethodological research often involves breaching experiments or deliberately violating social norms to reveal the underlying social rules. Ethnography, on the other hand, seeks to provide a comprehensive and holistic understanding of a particular social group, community or culture. It aims to capture the richness of social life in its natural context and to explore the cultural patterns, beliefs and practices that characterize the studied group (Hammersley, 2019).

Ethnomethodology places a strong emphasis on the analysis of social interactions and the micro-level details of everyday life. It often utilizes conversation analysis, video recordings and detailed transcriptions to capture the subtleties and intricacies of social interactions.

Ethnomethodologists focus on the sequential organization of talk, the use of gestures and the production of social order *in situ*. Ethnography, on the other hand, employs a range of qualitative methods such as participant observation, interviews and document analysis. It aims to provide a thick description of the cultural context, social relations and practices within the studied setting. Ethnographers typically spend an extended period of time in the field to develop a deep understanding of the social world they are investigating (Randall et al., 2001).

While ethnomethodology and ethnography have distinct emphases and objectives, they can complement each other in research. Ethnomethodology can provide theoretical insights and analytical tools to enhance ethnographic studies, while ethnography can provide rich contextual information and detailed descriptions that inform ethnomethodological analysis.

## CRITICISM OF ETHNOMETHODOLOGY

Ethnomethodology, like any theoretical perspective or research methodology, attracts criticisms. While ethnomethodology makes significant contributions to the field of sociology, particularly in understanding the construction of social order and the methods people use to make sense of their social world, some critiques are raised.

One criticism is that ethnomethodology's focus on the micro-level details of social interactions and its emphasis on the unique and context-specific nature of social order limit its generalizability. Ethnomethodological studies often provide rich and detailed analyses of specific cases, but it can be challenging to generalize findings to broader social phenomena or to make broader theoretical claims (Atkinson, 1988).

Critics argue that ethnomethodology pays insufficient attention to the broader structural factors that shape social interactions and social order. Ethnomethodological analysis focuses primarily on the local methods and practices people use to create social order, often overlooking the influence of larger societal structures, institutions and power dynamics. Critics argue that a more comprehensive understanding of social life should include consideration of both micro-level interactions and macro-level social structures (Woolgar, 1981).

Some critics suggest that ethnomethodology does not engage sufficiently with broader sociological theory. While ethnomethodology provides valuable insights into how people conduct their everyday lives, it is seen by some as lacking a strong theoretical framework that connects it to broader sociological concepts and debates. This critique argues for the need to situate ethnomethodological insights within a broader theoretical framework to enhance their explanatory power (McHoul, 1994).

Ethnomethodology's reliance on qualitative and interpretive methods, such as participant observation and conversation analysis, can pose challenges in terms of reliability, objectivity and replicability. Critics argue that the subjectivity and interpretive nature of these methods can limit the validity and generalizability of ethnomethodological research findings. Additionally, conducting ethnomethodological studies can be time-consuming and resource-intensive, making large-scale studies difficult to undertake (Atkinson, 1988).

Critics argue that ethnomethodology downplays issues of social inequalities and power asymmetries. The emphasis on the 'common sense' understanding and negotiation of social order may overlook the ways in which social structures and power dynamics contribute to unequal distributions of resources and opportunities (McHoul, 1994). Ethnomethodologists

assert that social equalities and power disparities are manifest in the circumstances within which people negotiate and enact social life; they are the context of action.

It is worth noting that these criticisms do not dismiss the value of ethnmethodology but rather raise important considerations for its application and limitations. Ethnmethodology continues to evolve and adapt, with scholars addressing these critiques and engaging in debates to refine its theoretical underpinnings and research methods.

## KEY CONSTRUCTS OF ETHNOMETHODOLOGY

Below are key concepts in ethnmethodology necessary to understand and to employ ethnmethodology.

### **Indexicality**

In ethnmethodology, indexicality refers to the process through which individuals assign meaning to signs, symbols and communication in social interactions based on their contextual usage. It emphasizes the understanding that meaning is not inherent in the signs themselves but is actively constructed and interpreted within specific situations and social contexts (Atkinson, 1988; Coulon, 1995). For example, a heart can represent love/affection if in a personal message or health if placed on a food product's packaging. Likewise, a skull on a flag may be a symbol of lawlessness but the same skull on a bottle signifies poison. Indexicality is a fundamental concept in ethnmethodology because it recognizes that meaning is not fixed or predetermined but is rather contingent upon the immediate context and the ongoing interpretive practices of individuals involved in social interactions. Ethnmethodologists argue that individuals continuously engage in the active production of meaning through their ongoing interpretive work (Attewell, 1974).

### **Contextual Dependence**

Indexicality highlights that the meaning of signs or symbols is contextually dependent. The interpretation of a particular sign or symbol (e.g. heart) can vary depending on the specific situation (e.g. personal message or marketplace), participants involved and the broader social context. It emphasizes that meaning is not solely determined by the sign itself but emerges through its situated use.

### **Interpretive Work**

Ethnmethodology emphasizes the active interpretive work individuals engage in to assign meaning to signs. This work involves drawing on background knowledge, shared understandings and the immediate context to interpret the signs encountered in social interactions. Individuals continually negotiate and refine their interpretations based on ongoing feedback and interactions. For example, a heart on a package does not guarantee a consumer will like the product; does it mean this food has been vetted to be part of a healthy diet?

### **Practical Reasoning**

Indexicality is closely connected to the practical reasoning individuals employ in their everyday lives. Practical reasoning involves the use of common sense, situational awareness and shared cultural knowledge to interpret and navigate social interactions. It allows individuals to make sense of the signs and symbols (e.g. a skull) encountered in specific contexts (e.g. a bottle) and enables the coordination of social action (e.g. do not consume poison).

### **Reflexivity**

Ethnomethodology emphasizes the reflexive nature of indexicality. Individuals are not simply passive recipients of meanings; they actively participate in the construction and negotiation of meaning through their ongoing interpretive practices. This reflexivity highlights the dynamic and interactive nature of social interactions. For example, friends may create a convention of placing a heart emoji indicating favorite on a suggested activity in a WhatsApp group text but use a heart to signal romantic intent in a text to a lover.

### **Accountability**

Accountability refers to the social process through which individuals make their actions and behaviors understandable to others. It involves the ways in which individuals justify, explain or rationalize their actions in social interactions, thereby making their behavior accountable to others. Accountability involves providing reasons, justifications or explanations for one's behavior to others in a way that makes it intelligible and acceptable within the specific social context. Ethnomethodologists argue that accountability is not only concerned with individual actions but also with the social norms and expectations that shape those actions. It involves the negotiation and interpretation of these norms and expectations in social interactions, allowing individuals to understand and evaluate each other's behavior. For example, a person wearing a leather jacket emblazoned with a skull may be stigmatized for promoting antisocial behavior or lawlessness.

### **Taken-for-granted**

In ethnomethodology, the term ‘taken-for-granted’ refers to the implicit assumptions, background knowledge and shared understandings that individuals rely on in their everyday social interactions. These are the elements of social life that people often do not explicitly question or discuss but instead treat as unquestioned and self-evident. According to ethnomethodology, social order is not imposed from above or determined solely by external structures but is actively constructed and maintained by individuals in their everyday interactions. The taken-for-granted aspects of social life play a crucial role in this process. They guide individuals’ behavior, shape their interpretations of social situations and enable the smooth functioning of social interactions. These assumptions often operate at an implicit level and are rarely explicitly stated or discussed. For example, in a conversation between two people, there are taken-for-granted assumptions about turn-taking, how to initiate and end the conversation and the meanings associated with certain gestures or expressions. These assumptions allow the participants to navigate the conversation smoothly without explicitly negotiating each step.

## Mundane Social Practice

Mundane social practice refers to the everyday, routine activities and interactions through which individuals create and sustain social order. These are the ordinary practices that people engage in as part of their daily lives, often without conscious awareness or explicit reflection. Mundane social practices encompass a wide range of activities, such as conversations, greetings, gestures, routines and other ordinary actions that individuals perform in various social contexts. These practices are considered ‘mundane’ because they are often seen as unremarkable or taken for granted in the course of everyday life.

By closely examining the details of mundane social practices, ethnomethodologists aim to uncover the implicit rules, shared understandings and background knowledge that individuals draw upon in their social interactions. They explore the practical reasoning that individuals employ to navigate social situations, interpret the actions of others and coordinate their own behavior. For example, ethnomethodologists studying a mundane practice like interpersonal greetings at work may note that people acknowledge familiar people with a nod and/or smile but shake hands with someone they meet for the first time. Researchers may note that hand-shakes also appear at the end of a negotiation, signaling agreement and a promise to act upon the agreement. Through focusing on mundane social practices, ethnomethodology challenges the idea that social order is fixed or predetermined and highlights the active, ongoing work that individuals engage in to construct and sustain social reality. It emphasizes the significance of these seemingly ordinary practices in shaping the social order that we take for granted in our everyday lives (Garfinkel and Livingston, 2003).

## Breaches

The concept of ‘breaches’ or ‘breaching experiments’ is significant as it helps to uncover and understand the underlying social norms and expectations that guide social interactions. Breaches refer to intentionally violating or disrupting these established norms and rules of behavior in order to reveal their existence and influence. The purpose of conducting breaches is to make the taken-for-granted aspects of social life visible and open to analysis. By intentionally deviating from expected behaviors or breaking social conventions, ethnomethodologists aim to expose the underlying assumptions, routines and expectations that people rely on to maintain social order (Brinkmann, 2016).

When a breach occurs, it disrupts the smooth flow of social interactions, leading to confusion, discomfort or even conflict among the participants. These disruptions highlight the significance of the tacit rules and shared understandings that are usually taken for granted. Breaching experiments create a ‘breach’ in the social fabric, forcing individuals to confront and renegotiate the shared meanings and social order that govern their interactions. For example, a classic breaching experiment involves violating the norm of personal space by standing unusually close to someone in an elevator (Garfinkel, 1967). This experiment exposes the typically unspoken rules and expectations surrounding appropriate interpersonal distance, making individuals aware of the unarticulated norms that regulate their behavior.

By analyzing the reactions, responses and subsequent attempts to restore order following a breach, ethnomethodologists gain insights into the social processes and practices that individuals employ to navigate and maintain social order. It reveals the importance of background assumptions, social cues and the ongoing negotiation of meaning in everyday interactions. The

significance of breaches in ethnomethodology lies in their ability to challenge conventional understandings of social order and to uncover the ‘hidden’ aspects of social life that are often taken for granted (Garfinkel, 1967). They highlight the active role individuals play in maintaining and reproducing social norms, while also demonstrating the flexibility and adaptability of social practices in response to breaches and disruptions. By studying breaches, ethnomethodologists aim to uncover the underlying rules, shared meanings and social order that shape our everyday interactions.

## THE POTENTIAL OF ETHNOMETHODOLOGY

Ethnomethodology can provide valuable insights for understanding consumer behavior and informing marketing strategies. While ethnomethodology is not commonly used explicitly in marketing research, some of its concepts and principles can be applied to gain a deeper understanding of consumer practices and interactions.

We advocate for ethnomethodology to consider:

1. *Understanding Consumer Practices*: Ethnomethodology emphasizes the examination of everyday practices and interactions. By adopting an ethnomethodological lens, marketers can observe and analyze how consumers engage with products, services and brands in their natural settings. This can involve studying consumer routines, rituals, decision-making processes and the social context in which consumption occurs. Such insights can help marketers develop more targeted and contextually relevant marketing strategies.
2. *Uncovering Implicit Norms and Meanings*: Ethnomethodology focuses on uncovering the implicit norms and shared meanings that underlie social interactions. Similarly, marketers can apply this approach to uncover the implicit norms and meanings associated with specific products or brands. By studying how consumers interpret and make sense of marketing messages, advertisements and brand representations, marketers can better align their strategies with consumer expectations and avoid unintended misinterpretations. One such study in marketing and consumer research examines social conventions, specifically queuing in fast food restaurants (Schau and Gilly, 1997).
3. *Exploring Consumer Culture*: Ethnomethodology recognizes the importance of culture in shaping social interactions. In marketing, understanding consumer culture is crucial for developing effective marketing campaigns and resonating with target audiences. Ethnomethodological research can help marketers explore and analyze the cultural practices, symbols and discourses that influence consumer behavior. This can involve studying consumer communities, subcultures and the cultural contexts in which products and brands are consumed.
4. *Informing Product Design and Innovation*: Ethnomethodology’s focus on the practical aspects of social life can be applied to product design and innovation. By closely observing and understanding how consumers use products and solve everyday problems, marketers can identify opportunities for developing new products or improving existing ones. Ethnomethodology can provide insights into consumer needs, preferences and the ways in which they adapt and repurpose products to suit their specific contexts.

While ethnomethodology itself may not be widely utilized in marketing research, incorporating its principles can enhance qualitative research methods such as ethnography, in-depth

interviews and observation. By adopting an ethnomethodological perspective, marketers can gain a deeper understanding of consumer practices, interactions and the social dynamics that influence consumer behavior. These insights can inform marketing strategies, communication campaigns, product development and brand positioning, ultimately leading to more effective and contextually relevant marketing initiatives.

## BREACHES AND THE MARKET

Ethnomethodology breaches, or breaching experiments, can be used in marketing research to gain insights into consumer behavior, consumer expectations and the social dynamics that influence marketing effectiveness. By utilizing ethnomethodology breaches, marketers can go beyond surface-level observations and uncover the implicit social norms, expectations and practices that shape consumer behavior. These insights can inform marketing strategies, product design, communication approaches and brand positioning, leading to more effective and contextually relevant marketing initiatives.

We advocate that breaches can help understand:

1. *Revealing Implicit Consumer Expectations:* Breaching experiments can be conducted to intentionally violate or disrupt the norms and expectations that consumers hold regarding a particular product, service or brand. By deliberately deviating from the expected marketing practices or product features, marketers can observe and analyze consumer reactions and responses. This can provide valuable insights into the implicit expectations that consumers have and help marketers understand the unspoken rules that guide their consumption decisions.
2. *Uncovering Hidden Consumer Practices:* Ethnomethodology breaches can be used to shed light on the hidden or unobservable practices that consumers engage in while interacting with products or brands. By intentionally disrupting or challenging these practices, marketers can observe how consumers adapt, react and make sense of the situation. This can uncover new insights into consumer behavior, usage patterns and the creative ways in which consumers incorporate products into their daily lives.
3. *Examining the Social Context of Consumption:* Breaching experiments can be conducted in different social contexts to understand how consumers interact with products or brands within specific social environments. By intentionally introducing disruptions or violations in these contexts, marketers can gain insights into the social dynamics, cultural norms and group influences that shape consumer behavior. This can inform marketing strategies, such as tailoring advertisements or campaigns, to align with specific social contexts or consumer subcultures. For example, a social platform where consumers enact something usually performed in relative privacy, e.g. payment for services, can help us understand how consumers decide to pay for services and tip service providers more generally. Through examining online and offline services we can see if tipping when more public is enhanced or deduced due to its observable nature.
4. *Testing Marketing Strategies and Messages:* Ethnomethodology breaches can be used to test the effectiveness of marketing strategies, messages or campaigns. By intentionally deviating from the expected marketing practices or messaging approaches, marketers can observe consumer reactions, interpretations and responses. This can help identify potential

gaps or misalignments between the intended message and the way it is received by consumers, leading to improvements in marketing communication and campaign design.

It is important to note that ethnomethodology breaches in marketing research should be conducted ethically and with the informed consent of the participants. The goal is not to deceive or harm consumers but to gain deeper insights into their behaviors, expectations, and interactions.

## SUMMARY

Overall, ethnomethodology seeks to shed light on the methods and practices that underlie social order, offering insights into the socially constructed nature of reality and the ways in which individuals actively shape their social worlds through their everyday actions. At its core, ethnomethodology challenges the assumption that social order is given and predetermined, instead focusing on how individuals actively construct and maintain that order through their everyday actions. Ethnomethodologists aim to uncover the implicit, taken-for-granted rules and practices that people employ to generate shared meanings and expectations in social interactions.

Ethnomethodology is particularly useful for the examination of markets and market-oriented social interactions. Consumer decision-making is often taken-for-granted, making it difficult to deeply understand. We argue that ethnomethodology disrupts the ordinary, allowing us a window to consumer interpretation. We offer that while ethnomethodology focuses on local enactments of practice, the insights are transportable to other contexts that share common characteristics.

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## 26. Building marketing theory using archival data: understanding alternative approaches

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### INTRODUCTION

With increasing frequency, marketing scholars who use qualitative methods are turning to archival data in their theory building enterprises. Among qualitative researchers, the term ‘archival data’ refers to data that was not originally generated by the researcher; it can vary in form from text to images to sound to objects (Bowen, 2009; Mills and Mills, 2018) and can be in digital or non-digital format. While marketing historians have long relied on physical archives stored in libraries and other repositories (e.g. Karababa and Ger, 2011),<sup>1</sup> it appears that an ever-broader range of qualitative researchers are increasingly using archived material – much of it online – as a major source of data (e.g. Coskuner-Balli, 2020; Denegri-Knott and Tadajewski, 2017; Hakala et al., 2017; Sobande et al., 2020).

This growth in the use of archival data has not escaped the attention of marketing scholars concerned with methodological best practices. In particular, considerable attention has been devoted recently to how automated text analysis can be used to process the large data sets of archival texts that are being assembled with increasing frequency (e.g. Berger et al., 2020; Humphreys and Wang, 2018). And outside marketing, recent advice on how to gather and analyze archival data can likewise be found (e.g. Bowen, 2009; Levina and Vaast, 2015).

It can be argued, however, that the methodological advice on offer to date tends to obscure, rather than to illuminate, important questions for qualitative marketing researchers who are drawing on archival data. We identify three such questions: First, are there different ways that qualitative researchers are using archival data to build theory? Second, what are the assumptions that undergird different approaches? And third, what are the implications of these assumptions that are informing research practice?

In this chapter, we address these questions through an inductive analysis of recent qualitative research, published in a selective set of marketing journals, which has made use of one or more types of archival data. Based on this analysis, we develop a typology (see Table 26.1) to help us acknowledge and make sense of the wide variety in ways that archival data may be used by qualitative researchers.

In the following sections, we describe four distinct approaches to using archival data that we identified in our analysis. For each, we first review its core assumption regarding the data. We then discuss two exemplars that illustrate the type. We also comment on the extent to which papers of this type tend to rely on archival data, the forms of archival data that are routinely used, and the other types of data with which archival is often combined.

## THE CONSTITUTIVE APPROACH

We use the term ‘constitutive’ to refer to research that is grounded in the assumption that the archival data collected is powerful in constituting or shaping the perceptions of actors who are exposed to it. Work of this type resonates with assumptions made by media scholars who claim, for example, that newspapers or magazines in wide circulation to a general audience not only reflect, but also influence, public perception (e.g. Gitlin, 1980).

*Table 26.1 Approaches to the use of archival data*

Name of approach	Assumptions about archival data	Exemplars	Characteristics of archival data/analysis	Most typical forms of archival data	Often combined with
Constitutive	Archival data shapes and influences understandings.	Humphreys (2010); Schwarzkopf (2014)	Large volume of data, systematized data collection and a position of some analysis.	Text produced by actors in data collection and a position of some authority.	Usually nearly purely archival.
Interactional	Archival data represents an interactional trace of online culture, collective, and/or community.	Kozinets et al. (2017); Hakala et al. (2017)	Large volume of online data, analytic approach varies.	Online posts that capture interactions.	Field notes and offline primary interviews.
Individual narrative	Archival data is an alternative to primary interviews.	St. James et al. (2011); Parmentier and Fischer (2021)	Multiple publicly available interviews with a given person; systematic data collection.	Media interviews and profiles; personal social media content.	Primary interviews with other actors, company documents.
Triangulation	Assumptions appear to vary.	Prior and Marcos-Cuevas (2016); Kjeldgaard et al. (2017)	Low to moderate volume; data collection not systematized.	Press coverage, company documents, online posts, documentaries, etc.	Primary interviews, field notes, surveys.

Significantly, work that treats the archival data it studies as constitutive does not assume all archival data that could be collected is equally constitutive of understandings, or constitutive of understandings with the same audiences. For example, media scholars assume that, for a given issue of interest:

[T]here is the specialist's discourse using journals and other print media aimed at those whose professional lives involve them in the issue. There is the largely oral discourse used by officials who are directly involved in decision-making roles on the issue and by those who attempt to influence them. There is the challenger discourse, providing packages that are intended to mobilize their audiences for some form of collective action. General audience media [newspaper in wide circulation] are only some of the forums for public discourse on an issue. If one is interested in predicting policy outcomes, they are not necessarily the most important forums. But if one is interested in public opinion, then media discourse dominates the larger issue culture, both reflecting it and contributing to its creation (Gamson and Modigliani, 1989, 2–3).

As the foregoing quotation indicates, the archival data that one might assume is constitutive in terms of influencing the perceptions of specialists in a field is likely not the same data as that which is constitutive in terms of influencing the general public (e.g. consumers) in a field.

One exemplar of research of this type is Humphreys (2010), which analyzes how news articles about casino gambling published between 1980 and 2007 in US newspapers with the top circulation in all 50 states (*The New York Times*, *The Wall Street Journal* and *U.S.A. Today*) helped to legitimate the industry in the eyes of consumers. Humphrey's assumption is that the media coverage of the industry is influenced by managers of casino gambling companies, and she also analyzes archival data in the form of press releases and published interviews with executives from these companies to triangulate her media data.

While Humphrey's (2010) paper is concerned with how consumers views were shaped by one form of archival data (newspapers), our second exemplar is concerned with how a different audience, marketing managers, was influenced by a different form of archival data. Schwarzkopf (2014) drew on unpublished research reports written between 1939 and 1973 for clients of Ernst Dichter's Institute for Motivational Research; Schwarzkopf's research objective was to understand how Dichter's writings had shaped his clients' perceptions, in particular their understanding of people in targeted markets as 'individualistic, self-actualizing, [and] self-seeking consumers' (43). Schwarzkopf's claim is that Dichter's reports to clients revised their understandings profoundly: they 'overturned the formerly accepted view that inhibited and restrained consumer desires were a necessary part of consumer welfare and wider social stability' (40). Although Humphreys' work differs starkly from Schwarzkopf's in terms of the archival data collected and the audience influenced by it, they share in common the assumption that the texts collected in their archival databases are constitutive in their own right.

We observe that research that assumes that a certain body of archival data is constitutive in terms of influencing a particular audience tends to rely on systematically gathering and analyzing a large body of data. For example, Humphreys (2010, 5) notes she used a search engine (Factiva) to identify all the articles that contained the keyword 'casino' in their title or lead paragraph that appeared in the newspapers she studied over the relevant time frame; this totaled 7211 articles. And Schwarzkopf (2014) gathered and analyzed a subset of more than 4000 original reports he obtained through the University of Vienna's Ernest Dichter Archive and the Ernest Dichter Collection at Hagley Museum and Archive, Delaware, subjecting this material to a 'cross-sectional, cross-country and cross-temporal meta-analysis using historical contextualization and the method of content analysis' (2014, 41). This concern for systematicity in gathering and analyzing a large body of archival data is logical given the interest in uncovering how the data is influencing audience understandings: papers that rely on a smaller volume of data or data that is collected less systematically would be less likely to be judged credible by reviewers.

We further observe that papers within this category of our typology typically rely on archival data that is produced by actors who are regarded with some authority by their audiences. For example, the journalists who produce the newspaper articles studied by Humphreys (2010) are arguably regarded as authorities, as 'objective' journalists employed by credible news outlets. Similarly, Ernst Dichter was likely to have been regarded as an authority by his clients given his profile as an expert market researcher (Schwarzkopf, 2014).

We also note that papers which treat archival data as constitutive tend *not* to combine that data with other forms of data such as primary interviews or observations (though it may incorporate multiple forms of archival data). We speculate that this is because such additional data is not regarded as necessary to support the claims made about the influence of this archival data on the understandings of its audience.

## THE INTERACTIONAL APPROACH

Archival research that takes an interactional approach is characterized by the assumption that a body of (typically) online data represents an interactional trace of an online culture and/or aggregate of people. Work we include in this category does not inevitably assume that those who are posting and responding constitute a community (e.g. Arvidsson and Caliandro, 2016), or that the online collective also interacts offline. What work in this category *does* have in common is that it takes for granted that the data collected represents interactions between those who make ‘posts’ and those who respond. Work of this type predates contemporary social media platforms (e.g. Baym, 1995; Turkle, 1996), but has grown rapidly as opportunities for online interaction on Reddit, Facebook, Twitter, YouTube, Instagram, TikTok and countless other platforms have proliferated. In contrast to work that takes a constitutive approach, work that takes an interactional approach does not assume that archival materials are created by authorities who shape the opinions of others; rather it assumes they are created by a collection of people whose status, authority and influence over one another are likely to be highly variable.

The articles we place in this category sometimes, but not inevitably, include participation by the researcher in the online culture or community under investigation. This participation can lead to the co-creation by the researcher and those they interact with of additional data that augments the archived digital data that the researcher had no hand in creating. Moreover, those engaging in such work will frequently take field notes relating to their observations of online interaction. Work that entails not only the collection of archived online interactions, but also the taking of field notes and engagement by the researcher with members of the focal collective, is often referred to as ‘netnography’ (e.g. Kozinets, 2002; 2015; 2020; Kozinets et al., 2018) or ‘online ethnography’ (e.g. Markham, 2005; Baym and Markham, 2009). In netnographic work, field notes and posts from the researchers lead to the creation of primary data that complements the archival data not generated by the researchers’ interventions.

Unsurprisingly, the data sets that are compiled for such work are typically quite large and wide ranging, though not necessarily delimited by the boundaries of any given platform. In this regard, research that assumes online archival data represent interactions differs also from research that assumes online archival data is constitutive, since the latter typically selects data from a clearly bounded set of sources, as noted above.

We illustrate the often sprawling nature of work in this tradition drawing on the example of Kozinets et al. (2017) who studied the networked nature of desire by investigating online food image sharing. They collected data from blogs, forums, Twitter, Facebook, Reddit, Instagram, YouTube, Pinterest, Vine and Platter (an online food-oriented social network). They explain that they ‘followed topics and consumers through the tangled terrain of food postings, leading [them] to a rich array of sites, both online and off, as well as different types of sharing, from occasional, private, and amateur to regular, public, and professional’ (Kozinets et al., 2017, 666). And they combined this digital archival data with field notes taken in both online and

offline settings, and 17 interviews with those who make food posts or who interact with those posts. They explain that they analyze this data through a combination of hermeneutic, visual and ‘inter-penetration’ techniques (Kozinets et al., 2017, 667).

A second exemplar of work of this kind is Hakala et al.’s (2017) study of how an online brand community can help legitimate a brand. They studied online interactions among Facebook followers of two brands, BMW and BrewDog. They indicate that they analyzed ‘1736 organizational posts and 15 490 written comments from the BMW Facebook pages [and] 1370 posts and 12 350 written comments published on the BrewDog Facebook site’ as well as examining ‘official websites, blogs and other electronic materials available from the case organizations’ (542). In this study, no field notes were taken during observation of online interactions, and no interviews were conducted with those who were members of the Facebook groups. In contrast with Kozinets et al. (2017), Hakala et al. (2017) indicate that they ‘opted for non-participant observation in order to capture social action and interactions as they occurred ... in order to avoid any undesirable influence of the outsider on the group’ (543). To analyze their data, this team focused on identifying practices and discourses that contributed to legitimating the brand, focusing on linguistic forms. In general, we observe that there is no one dominant approach to data analysis techniques common across work falling within this category.

## THE INDIVIDUAL NARRATIVE APPROACH

Though less common, some researchers gather and analyze archival data as an alternative to primary interviews. Sometimes, this occurs in studies where those whose narratives are of interest are of such prominence that they have been interviewed multiple times by members of the press, even though they are largely inaccessible to the majority of scholarly researchers. Examples here would include founders or chief executive officers of extremely high-profile organizations, elected officials or renowned celebrities in fields such as sports, fashion or entertainment (e.g. Fournier and Eckhardt, 2019; Parmentier and Fischer, 2021). In other cases, this occurs when those whose narratives are of interest have created a body of relevant materials in the form of diaries, journals or blogs that are rich and relevant to the research questions of interest (e.g. St. James et al., 2011).

The implicit assumption in research that takes an individual narrative approach is that these published, publicly available materials are reflective of people’s individual narratives in much the same way that primary interviews are assumed to be. Of course, this raises questions about how good a substitute archived materials can be for interviews conducted by researchers themselves. It might be assumed that, when a researcher conducts a primary interview, they obtain the best possible data. Contrary to this view, Belk (1992) has argued that materials such as diaries, journals and the like may be of greater value than primary interviews to the extent that they ‘record not only events in the lives of the writers but also introspective reflections regarding the interior meanings and emotional impacts of these events [and] provide a unique opportunity to understand the phenomenology of daily life without the self-conscious presentation and potential biases of responding to a researcher’ (341). Somewhat more cautiously, Hookway (2008) argues that the trustworthiness of such forms of archival data is comparable to that collected in primary interviews, noting that even if identity play might occur in texts that are part of a public archive, the narratives they contain still provide insight into the social construction of the topic of interest.

Also worth noting is Alvesson's (2003) argument that primary interviews are fraught with such discursive practices as identity work, cultural script appropriation, moral storytelling and politically motivated action and that researchers should be wary of them as devices for discerning 'the truth' or unproblematically accessing phenomenological insights. If one accepts the view that primary interviews are susceptible to at least as many distortions as publicly accessible archival materials, there is no necessary reason to regard them as an inferior substitute so long as the subject matter they cover is sufficiently relevant to the research question at hand. And in some cases, archivally available materials may allow researchers to compare the thoughts, claims and anecdotes offered by an individual at one point in time with those they generate at much later points in time, which is often impossible if a researcher is relying solely on primary interviews conducted during the necessarily limited time frame of a research project.

Our observation of papers that use archival data in lieu of primary interviews suggests that they are often combined with other data of multiple and varied kinds. Sometimes, researchers will also conduct primary interviews with other actors in a field of interest to better understand the context, even while relying on archival narratives for those who are most focal to the analysis. For example, Parmentier and Fischer (2021) were interested in how people manage their professional brands when they take on prestigious posts in high profile organizations: the category of actors that was focal in their research was creative directors at heritage fashion houses. The famous creative directors of these houses were not accessible for primary interviews, but the authors assembled and analyzed a database of 307 published media interviews with and/or profiles of the 20 individuals on whom they focused. To supplement this, they also conducted primary interviews with six individuals with in-depth industry knowledge (a buyer, a style director, a PR and communication executive, a high-fashion consultant and two fashion scholars) to ensure an understanding of the context. Further, they conducted observational research in stores and at exhibits and museums sponsored by the heritage houses, collected news coverage and opinion pieces regarding the hiring and firing of creative directors, as well as viewing documentaries and listening to podcasts relevant to their focal field and phenomenon. As this long list suggests, the contextual knowledge required to understand the available archival interviews with creative directors was assembled through extensive additional data collection.

A second example is St. James et al. (2011), who studied magical thinking as a cultural practice of meaning negotiation that works to restore the experience of interconnectedness for people when this experience has been broken. They explored this phenomenon in the context of individuals who were going through attempts to lose weight. And while they did collect data through primary interviews with six individuals, they also gathered blog data from four other individuals who were posting online over the course of at least one year about their weight loss journeys. St. James and colleagues make the case for the value of this archival data as follows:

Blogs constitute a valuable complement to our in-depth interviews as consumers tell their story as it unfolds – through multiple entries over extended periods of time – instead of recalling past experiences. Whereas interviews involve a private dialogue between the researcher and informant, blogs constitute a public presentation of the self and thus offer a privileged window into the [social] construction of weight loss (St. James et al., 2011, 637).

In their paper, the authors treat the blog and interview data as virtually interchangeable evidence of individual consumers 'stories', and they supplement these stories by reading published weight loss memoirs and internet weight loss forums.

If we contrast the examples of research that uses an individual narrative approach with other approaches to the use of archival data, it becomes clear that this category differs somewhat from both of those previously discussed. Unlike research that treats archival data as constitutive, there is no assumption that these surrogates for primary interviews shape others' understandings; they are merely regarded as an indication of what the individual wishes to narrate. And unlike research that treats archival data as an interactional trace, there is no assumption that this data is embedded within a collective conversation.

## THE TRIANGULATION APPROACH

The term 'triangulation' refers to searching for convergence among multiple sources or forms of qualitative data in an attempt to secure a deep and valid understanding of the phenomenon in question (Denzin, 1970). Marketing scholars have long advocated triangulation, especially since different sources of data (e.g. observations versus interviews (Arnould and Wallendorf, 1994)) can yield different insights that can be compared and contrasted to achieve a coherent account of a phenomenon. Work that deploys archival data for triangulation purposes typically positions it as useful for ensuring that the interpretation developed from the primary data can be confirmed through secondary data not created by the researcher.

We observe that studies that take what we term a triangulation approach tend to draw on primary data in the form of interviews, field notes or both to develop and document their interpretive insights, and to rely on archival data as purely supplemental. The assumptions made about the archival data under the triangulation approach are somewhat difficult to characterize, since the data often do not feature anywhere in final papers.

To illustrate, consider the example of Prior and Marcos-Cuevas (2016) who study the impact of buyer-seller engagement styles on the co-destruction of value in interfirm relationships. Their primary data includes focus group and individual interviews with executives from both the buying firm and the supplying firm they studied. In regard to archival data, they state:

we also used documentary evidence in the form of company reports, meeting agendas and minutes, presentations, and planning documents, in addition to other records and written artefacts. ... These provided an important basis for triangulation ... as well as direction and redirection (540).

Despite the assertion that their archival data were important, Prior and Marcos-Cuevas (2016) do not actually quote or refer to any of the documentary data they collect as they are explicating their findings; rather, they rely solely on quotations from interviews to support their claims.

In contrast, Kjeldgaard et al. (2017), make considerable use of the archival data they collect to complement their primary sources of data. Their focus was on how consumers can strategically work to alter market systems through formally organized activities, and they explain that they use archival data (content from a community website and from a member magazine for beer enthusiasts) 'to support [their] ethnographic content and the information from the interviews, and to triangulate data' (57). Throughout their findings section, they intersperse quotes from the community website and from the member magazine with quotes from individual consumers to support their claims that consumers can challenge dominant institutional logics

and advance alternate logics to reshape markets. They treat the sources of data as completely complementary, which indicates that both are assumed to reflect consumers' purposive market actions.

In contrast to each of the other approaches in our typology, this use of archival data is both the most common, and the least remarked upon, by those who deploy it. By this we mean that papers in which archival data is used for triangulation purposes tend to offer relatively sparse descriptions of the sources of archival data and limited rationales to explain why the sources were chosen. We speculate this may be because triangulation of different data sources has long been valorized as a procedure that enhances the validity of qualitative research undertakings (e.g. Creswell and Miller, 2000). It is a practice that is implicitly taken-for-granted as a marker of good quality in qualitative research. Interestingly, although when we searched for examples, we could identify only one paper where the authors reported divergence between their archival data and their primary data: McAlexander et al. (2014) studied how consumers manage identity reconstruction when a former institutional pillar of identity no longer carries the legitimacy and authority it once had. They used archival online data to triangulate with interview and observational data, and note the following:

The archival online sources predominantly articulate clean, rational (although emotionally charged) and linear narratives ... By comparison, in-person depth interviews and in-person observation of informants struggling with identity challenges revealed much more vacillation, turmoil, inner and interpersonal conflict, and, somewhat surprisingly, blatant contradictions within accounts, especially in terms of timelines and emotional states at any given point in the process of rebuilding identity. It would be possible, using only Internet sources, to construct a neat, linear understanding of institutional exit and subsequent identity construction that fits with the whole corpus of role-transition and rites of-passage literature, but it would be a comparatively bankrupt interpretation of informants' lived experiences, the realities of which are much messier than those literatures would suggest (865).

As this thoughtful comment reveals, the use of archival data to triangulate other forms of data may not lead to simple corroboration. Rather, it may assist authors in identifying disparities in a manner that leads to theoretical insights that would not otherwise be possible. We cannot know how often this is the case since most papers are silent on whether triangulation between data sources results in complete or partial corroboration.

## DISCUSSION

Our interest in writing this chapter arose from our own efforts to make sense of how we could best use the abundant archival data that is now so relatively easy to acquire. As we ourselves have sought for guidance on different ways of using archival data, we found the existing methodological literature stopped short of acknowledging the diverse ways in which the archival data could be, and is being, used. While we appreciate the explicit guidance being offered on certain approaches to building theory from archival data, we wanted to understand the full gamut of practices, in part to ensure that no one approach (such as automated text analysis) comes to be considered the one 'right' way to analyze archival data. Thus, we set out to inductively identify usage patterns, and to develop the grounded typology that is offered above.

Having developed this typology, we seek to circulate with two goals in mind. The first is to stimulate further collective thinking on additional ways that archival data is being, or could be, used for theory building; while we believe our typology well reflects current practice, we also

believe new ways of using archival data can and will emerge. We want to clarify this in part to acknowledge that our typology may become dated, and in part because we do not believe a typology such as this should ever be used to police the uses of archival data.

Keeping the first goal in mind, our second goal is to offer some guidance to fellow qualitative researchers who are struggling with questions regarding how they might make use of archival data. We believe that it may be useful for our fellow qualitative researchers to reflect, at the data collection phase of a research project when goals are emerging and alternate sources of data are being considered, about the assumptions they want to and can make about the archival data they are accessing. For any given source of archival data, the researcher might ponder whether it is appropriate to think of that data as constitutive, as an interactional trace, as a surrogate for interview data, or as a complementary source that triangulates non-archival data. Some data might fit well with some of these assumptions, but not others. Sometimes, it might be possible to find alternate sources of archival data that better align with the assumptions that the researcher wishes to make.

For example, qualitative marketing researchers may take note of the fact that Twitter has opened up its full tweet archive to academic researchers for free so that researchers may better study user behavior and trends related to online discourse (Statt, 2021<sup>2</sup>). How might researchers take advantage of this seeming opportunity? One possibility would be to examine tweets from figures of authority, assuming that those tweets have agency and shape the views of Twitter followers. Another possibility would be to look at interactions (replies, retweets) between Twitter users, assuming that those are interactional traces of a collective. A third possibility would be to treat the body of tweets of a given individual as an alternative to an interview with that person. A fourth would be to select a subset of tweets relevant to a topic about which other data has been gathered, and to treat the tweets as an opportunity for triangulation.

If researchers are mindful about assumptions at the data collection stage, it can help not only with selecting sources but in gauging the systematicity with which the data need be collected and the volume of data that is required. While systematized approaches can always be defended, our analysis suggests that systematization of data collection is likely to be critical for credibility when treating archival data as constitutive, laudable when treating it as interactional trace or an alternate to primary interviews, and much less essential when treating it as an opportunity for triangulation. In regard to the volume of archival data required or advisable, it appears that lower volumes are likely sufficient when using archival data to triangulate but higher volumes will be required for other types of uses.

If qualitative researchers have been mindful about their assumptions regarding archival data during the collection phase, it should follow logically that this will also guide them in the analysis and writing stage. Increasing researcher reflexivity about assumptions could help scholars avoid potentially contradictory assumptions within the same analysis: for example, it is probably logically contradictory to treat the same archival data as both constitutive of reality and as reflective of an individual's narrative. Reflexivity about assumptions should also help researchers ensure that any enabling lenses that are used in analyzing the data are logically aligned with the assumptions regarding the data, and that terminology used in the write-up aligns as well.

Lest these suggestions be misinterpreted, we conclude by noting that we offer them not as rules to be followed but as advice we hope is helpful. Ultimately, our objective in this chapter is to spark a productive conversation among qualitative marketing researchers about theorizing from archival data, and to promote even greater plurality in practice.

## NOTES

1. Since Karababa's chapter in this volume deals with collecting and analyzing historical data, we will exclude from consideration here research that is positioned as historical and that draws on archival data.
2. At the time of writing, the new owner of Twitter (now 'X'), Elon Musk, has not yet reversed this decision. It is of course possible that he will do so.

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## 27. Metaphors in automated text analysis

*Ignacio Luri*

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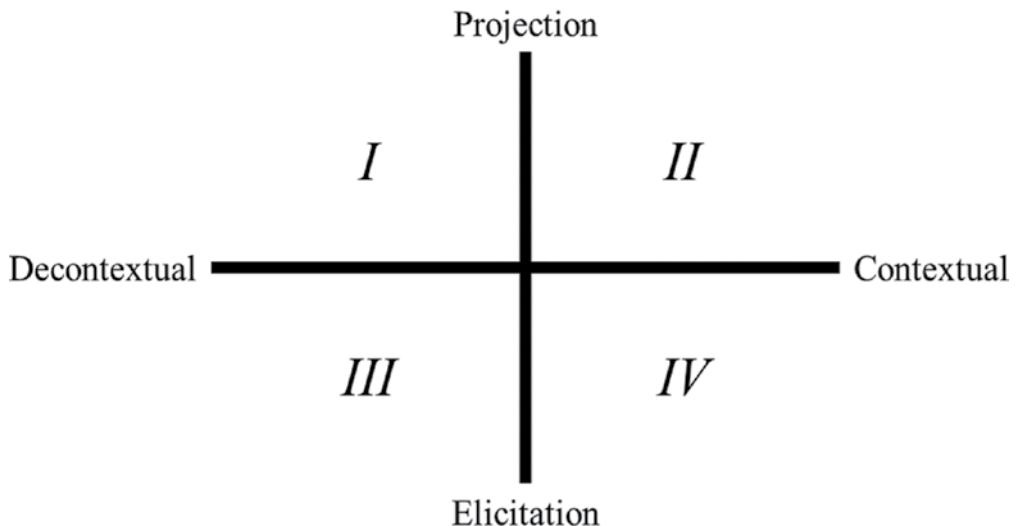
### INTRODUCTION

Automated text analysis (ATA) is a powerful tool for the qualitative researcher (Berger et al., 2020). ATA can open the door to extremely rich and abundant text data (Boegershausen et al., 2022), and help answer a variety of impactful research questions. However, figurative language (e.g. idioms, metaphor, simile) remains the Achilles' heel of automated methods for text analysis (Iliev et al., 2015; Wittink, 2011). Figurative, nonliteral expressions are challenging for ATA because of the importance of context (Hanks, 2004) and their lack of a 'logical' interpretation based on typical word meanings (Glucksberg and McGlone, 2021). In this chapter, I focus on the archetypal figurative device, the metaphor, to suggest a solution to this challenge. Metaphorical idioms (fixed multiword expressions whose meaning is distinct from the sum of its parts) such as 'spill the beans' and conventionalized metaphors such as 'something being a burden on someone's shoulder' share in common a fixedness and predictable structure that greatly aids ATA.

The next section gives a bird-view look at metaphors in marketing, with a focus on how and why qualitative marketing researchers may benefit from them. Then, the chapter continues by providing guidance to those interested in considering metaphor in automated text analysis studies. Two main arguments will be at the core of my advice. First, I assert that there is a mutually beneficial relationship between ATA and qualitative insight. And second, I aver the usefulness of widening the unit of analysis of ATA beyond individual words, powered by the predictable structure of constructions in language. Finally, I conclude by further illustrating the value of a construction-mindset in ATA using the metaphor-adjacent phenomenon of snowclones.

### METAPHOR AS A RESEARCH TOPIC AND TOOL IN MARKETING

Metaphor may be the most widely researched linguistic phenomenon (Steen, 2007). Indeed, the importance of metaphor in language cannot be overstated, as it plays a central role in our ability to talk and think about abstract or complex topics (Lakoff and Johnson, 1980a). Metaphors are so commonplace in social science research and business communication that their use goes often unrecognized, particularly in marketing (Hunt and Menon, 1995). Explicit research focus on metaphors by qualitative researchers has been a fruitful endeavor in marketing (Coulter et al., 2001; Fillis and Rentschler, 2008; Hirschman, 2007; Hunt and Menon, 1995) as well as in neighboring disciplines such as organizational science and communications (Burgers et al., 2016; Cornelissen, 2005; Koch and Deetz, 1981; Mio, 1997). To highlight past and future avenues for use of metaphor in qualitative marketing research, I adapt the work by Cornelissen and colleagues (2008). The original diagram was populated with examples of metaphor studies in organizational science, but we can use it as a framework for past (and future) marketing research (Figure 27.1).



*Source:* Based on Cornelissen et al., 2008.

*Figure 27.1 Focus and form of metaphor in marketing research*

The horizontal axis represents the form or approach to the study of metaphors. Cognitive or cognitive linguistic approaches tend to decontextualize metaphors, aiming to find the metaphorical concepts or cognitive mappings in the human mind, across speakers and situations. On the other hand, discourse analytic approaches are by definition concerned with examining language use in context, seeing metaphors and their meanings through the lens of their users, the situation of their utterance and the broader context of the discourse.

The vertical axis relates to the focus of the research on metaphors. Elicitation inquiries and techniques attempt to surface the metaphors naturally used by individuals. This is an inductive approach to illuminate the sense-making heuristics and associations of the populations of interest. Alternatively, a more deductive approach is to project or impose metaphors onto the contexts of interest, perhaps as an interview prompt or as experimental intervention. Maybe even more significant is the projection of metaphors during theory-building as a strategy to organize or illuminate findings through illuminating researcher metaphors. In other words, elicitation research approaches focus on *emic* metaphors, identified in the own words of the people studied. In projection approaches, researchers are the ones to use metaphors as an *etic* tool to make sense of phenomena and communicate that particular way of seeing it.

To clarify the application of this framework to qualitative marketing research, below, I briefly illustrate each of the four quadrants in Figure 27.1 with market-relevant examples.

### **Quadrant I (Decontextual-projection)**

Perhaps the most valuable use of metaphor projection during the qualitative research process is for theory-building, when metaphors are employed to organize and frame complex topics or findings. This takes advantage of the metaphor power to enlighten by relating one thing to another. A decontextual projective approach searches for the right scientific or theoretical metaphor to understand a complex issue. For example, many of the traditional metaphors for

marketing activities (e.g. marketing as warfare, Arndt, 1985; customer journey, Maglio, 2015) have come from the fruitful metaphorical application of a general domain to marketing topics.

The aptness or heuristic value of these scientific or theory-constitutive metaphors can and should be judged. Much of the success of the ‘marketing as warfare’ metaphor must be attributed to the deep cultural well of war theorization and practice from which marketing science liberally borrowed. In contrast, the ‘products are organisms’ (e.g. product life cycle, niche) metaphor was rich in terminology but benefited little from the rich theories in biology and medical sciences (for a deeper discussion on evaluating scientific metaphor value, see Hunt and Menon, 1995). Regardless, even ‘mere’ metaphorical terminology has a way to orient thinking and action, so a fruitful avenue for research in the past and future is to critically reassess dominant projected metaphors and propose new ones (Delbaere and Slobodzian, 2019; Rindfleisch, 1996).

### **Quadrant II (Contextual-projection)**

A similar metaphorical theorization, that of consumer-brands relationships (Fournier, 1998), would however be better characterized as a contextual example. Indeed, while this qualitative study does not set out to elicit the natural metaphors of the consumers interviewed, the metaphor is grounded in a very specific context and flows from the lived experience of those consumers. The interview data in this study displays few, if any, explicit relationship metaphors, but the metaphor makes sense of their accounts of lived experience. Contextual projective approaches are used by qualitative researchers when they employ metaphors to name themes or concepts emerging from the data; not because those metaphors actually appear in the words studied, but as a theory-building device. Qualitative studies like Fournier’s (1998) consumer-brand relationship or Arnould and Price’s (1993) ‘river magic’ exemplify how a discursive analysis can shed light onto a specific consumption context by framing it through the right projected metaphor.

### **Quadrant III (Decontextual-elicitation)**

While projection research deals with etic metaphors, elicitation studies look closely at the discourse of people or institutions for metaphors in their own words. Of course, any empirical metaphor elicitation study occurs within a certain communication context. However, decontextual metaphor elicitation research attempts to learn about general cognitive or (broadly human) anthropological metaphorical mappings between two domains that are consistent across speakers and speech contexts. The quintessential stream of literature within this quadrant is inspired by Lakoff and Johnson’s (1980b) Conceptual Metaphor Theory (CMT). In marketing, finding these perhaps universal ‘primary’ metaphors such as the relationship between verticality and status (Cian, 2017; Sundar and Noseworthy, 2014) and their market consequences has proved incredibly insightful. However, qualitative studies inspired by this literature have a notably scarce presence in marketing journals, and Cornelissen et al. (2008) found a similar gap in organizational sciences. Whenever these hugely influential theories of metaphor have been applied to qualitative marketing research, the studies have interpreted

primary or conceptual metaphors through a much more contextual lens (Bouillé et al., 2016; Luri Rodriguez, 2020; O'Mara-Shimek et al., 2015).

#### **Quadrant IV (Contextual-elicitation)**

Contextual-elicitation can be understood as the effort to mine naturally occurring consumer metaphors in a specific context, which reveals the consumers' natural 'common sense' in the topic. A great marketing example is the Zaltman Metaphor Elicitation Technique (ZMET: Coulter and Zaltman, 1994; Coulter et al., 2001; see also Coulter's chapter in this volume), which offers an interview method to 'surface the mental models that drive consumer thinking and behavior' (Zaltman and Coulter, 1995, 36). ZMET methodology prompts participants to select and share visuals that are meant to reveal the deep metaphors that underlie their thoughts or evaluations. While influenced by Lakoff's CMT and grounded on cognitive research, this qualitative technique aims to elicit metaphors that are deeply personal to the participants and highly contextual. Applications of ZMET like Coulter's (2006; this volume) study of Broadway theatre experiences illustrate how the methodology lends itself to investigating specific customer experiences rather than decontextualized universal models of decision making.

### **SUMMARY OF QUADRANT ANALYSIS**

Notably, any point along the two axes of Figure 27.1, and the resulting four quadrants, can be fertile ground for qualitative insight on market phenomena. For example, while highly amenable to experimental and even brain-imaging methods, a decontextual form has fueled research on widely shared anthropological metaphors like totemism, magic and anthropomorphism (Belk et al., 2021; Hirschman, 2007; Karanika and Hogg, 2020; Miles, 2013; Miles and Ibrahim, 2013). These forms are not mutually exclusive, but rather complementary, as illustrated by the wide currency of cognitive linguistic CMT within Critical Discourse Analysis (Budd et al., 2019).

Likewise, the duality of metaphor elicitation versus projection merely mirrors the fact that, in qualitative research methods, language is both the subject and the medium (Schmitt, 2005). Eliciting the natural metaphors in use in a given context is as important a contribution as finding the right researcher-imposed metaphors to illuminate a phenomenon. However, it seems superfluous to exalt the value of metaphor projection given the already dominant role that it plays in qualitative marketing theory generation (Arndt, 1985; Fillis and Rentschler, 2008). In the rest of this chapter, I focus on the task of eliciting metaphors from the data, searching for emic metaphors in the words of the people studied. In particular, the next section will regard the challenging but rewarding task of eliciting metaphors from large textual databases.

### **METAPHOR ELICITATION AND AUTOMATED TEXT ANALYSIS**

To qualitative social scientists, the label 'elicitation' suggests obtaining information from research participants with the aid of a visual, verbal or textual stimuli (Barton, 2015). In the framework for metaphor research by Cornelissen et al. (2008) and for the purposes of this

chapter, metaphors may be elicited from individual's natural use of language. Metaphor elicitation only requires a researcher focus on treating metaphors as data and as symbolic devices that require researcher interpretation (Cornelissen et al., 2008). For example, in the context of interview research, metaphors may be explicitly asked from the participants using certain prompts (e.g. ZMET), but a research interest in metaphors may also arise post hoc when inspection of the interview transcripts reveals unexpected metaphorical mappings. Metaphors may be elicited by simply seeking them within naturally occurring social media conversation, or in public speeches, text documents and more.

Eliciting metaphors from textual data, and in particular from big textual data, is somewhat less simple than the previous statement suggests. Researchers using interview data can flag metaphors as they encounter them in data analysis, notwithstanding the need for some subjective judgment identifying and prioritizing them. However, researchers who rely on automated text analysis methods to tackle large textual databases face difficulties, since these methods are not particularly well suited to figurative language (Iliev et al., 2015). And yet, studying metaphors using automated text analysis can shed light onto domains as relevant as news media opinion (Budd et al., 2019), corporate discourse (Koller, 2009), marketing communications (Jaworska, 2017) and more. I offer two solutions to this dilemma: seeing ATA as an iterative process involving qualitative judgment; and taking advantage of the fixedness of linguistic constructions.

### **Automated Text Analysis as an Iterative Process**

The rise in highly abstracted and statistically sophisticated methods to process large text databases makes it all the more necessary to advocate for a qualitative researcher's approach. The assumptions baked into automated text analysis demand that researchers complement a bird-view of the data with a deep understanding of word meanings in the particular context of study (Chapman, 2020; Grimmer and Stewart, 2013). A good practice that I and others have encouraged is to make use of contextualizers (also called keyword-in-context; KWIC) to easily visualize instances of any relevant word in their natural context (Deignan, 2008; Luri et al., 2023). Contextualizer tools are easily accessible to researchers; at least one free option is available (Anthony, 2022), and a contextualizer also comes built into the most recent version of popular text analysis software LWIC (Linguistic Inquiry and Word Count: Boyd et al., 2022).

To give one example, let us imagine an analysis of retailer website communications during the COVID pandemic using Latent Dirichlet Analysis (LDA). Topic detection methods like LDA are automatic, unsupervised machine learning algorithms that summarize large text databases in the form of different 'topics', each defined by a series of words. Statistical co-occurrence in the data in the form of clusters of words suggests topics, themes or perhaps frames (DiMaggio et al., 2013). Say one of such topics is defined by the keywords 'member', 'health', 'associate', 'fight' and 'target'. The actual meaning-in-use of these words in the data would not be self-evident for someone unfamiliar with the data. A contextualizer visualization of each of these words (Table 27.1), even within a 10- or 20-word context, can help understand that 'fight' is used metaphorically (as in '*fight* against COVID'). However, upon closer inspection, 'target' is revealed not to be a metaphor, but rather a mention of the most-represented retailer in the data, Target. On the other hand, 'associate' and 'member' appear to be common terms among these retailers to refer to their frontline employees.

*Table 27.1 A contextualizer visualization example*

Left Context	Hit	Right Context
View a ‘Humbling Experience’: One Woman’s Role in the world have an essential role on the frontlines of the that cloth face coverings are a critical tool in the on the frontline to combat the virus. I wanted to Sam’s Club Associates Adapt During COVID-19 View Download in	fight	against COVID-19. Walmart hires 200 000 associates and pays \$180 against the coronavirus. Walgreens to help administer COVID-19 vaccines against COVID-19 and could reduce the spread of the the spread of this virus. When I had the Against COVID-19. Walmart Foundation Grants Go L... BENTONVILLE, Ark.

A deeper dive into the data using contextualizers or concordancer tools may reveal that the metaphorical fight against the pandemic is part of a responsibilizing discourse that exalts underpaid employees as heroes while sacrificing them as ‘frontline soldiers’ (Lohmeyer and Taylor, 2021, 634). Thus, this LDA topic might be appropriately named ‘heroic employees in the COVID war’, or something similar.

LDA and other unsupervised topic modelling methods often gloss over the profound subjectivity in the qualitative interpretation and labelling of topics (Gillies et al., 2022). And yet, without this qualitative step, these methods provide no analytical value. However, examining the real meaning-in-use of words is equally useful for other automated text analysis processes, possibly more apt to study metaphors, from keyword analysis to dictionary methods. The important lesson is that automated text analysis can, and probably should, be part of an iterative process between quantitative, automated analysis and qualitative insight. Tools such as contextualizers are a great computer-assisted way to interrogate the output in form of keywords of automated text analysis methods as varied as topic modelling algorithms like LDA, dictionary methods and more. Qualitative marketing researchers have much to gain, and much to contribute to, automated text analysis approaches.

This section has detailed how to make use of contextualizers to explore and disambiguate potential metaphor words encountered fortuitously during automated text analysis. This may be helpful when metaphors arise from exploratory word counts, collocation or word embeddings analysis, topic modelling and more. However, how can we systematically search for and quantify theoretically relevant metaphors in text data once we have identified them?

### The Fixedness of Language as an ATA Tool

Computerized methods may not initially appear a great fit to study figurative language like metaphors. And yet, automated metaphor analysis has already made great progress in the social sciences thanks to increasingly effective machine learning and dictionary methods to locate metaphors in big textual data (Ignatow, 2016). Notwithstanding the layered complexity of figurative meanings, a useful property of language, and particularly of metaphors, is their tendency to organize predictably in fixed constructions.

### **Language is Like LEGO: Construction Grammar**

Construction grammar is a family of linguistic theories that posits that language is a creative act built upon pre-established building blocks called constructions (Michaelis, 2006). Importantly, constructions can be words but often are multiword fixed expressions or learned patterns. Thus, expressions such as ‘down on my luck’ must be understood as one single construction, where the whole is more than the sum of its parts. The remarkable fixedness of so many metaphorical constructions (with the previous expression always taking the form ‘down on (POSSESSIVE) luck’) has tremendous implications for automated text analysis because it makes them predictable, and thus searchable in large databases. Dictionary methods are especially well equipped to find, then, metaphorical expressions that have been identified either prior to data analysis or through iterative keyword exploration as described in the previous section. Much like Lakoff’s CMT, the roots of construction approaches are in cognitive linguistics but have since sparked fruitful research in more socially and contextually grounded fields (Groom, 2019).

The fixedness of metaphorical expressions is relative, and more often than not, metaphorical expressions allow for some degree of variation. In fact, novel, one-off metaphors of the type creatively used by writers defy automatic searches (Bowdle and Gentner, 2005). Luckily, metaphor elicitation research is usually more concerned with conventionalized metaphors that are shared and come to form individuals’ ‘common-sense’ reasoning. In practice, the extent to which metaphors conform to rigid constructions is a continuum, with metaphorical idioms being most invariable and most metaphors allowing some degree of variation (Horn, 2003). In practice, researchers using dictionary methods to elicit metaphorical expressions must include all variations of a construction (e.g. ‘down on (my, her, his, etc.) luck’). Alternatively, this can be accomplished with the use of wild cards (fill-in-the-blank characters that stand for any word) and other rule-based additions to dictionaries.

To illustrate further the usefulness of adopting a construction approach to automated text analysis of metaphors, let us go back to the COVID-19 example in Table 27.1. The value of a dictionary or content analysis focused on the word ‘fight’ alone would be limited by the diverse contexts and meanings (including both metaphorical and literal) of the word. On the other hand, a quick eyeball test reveals that the construction ‘fight against’ is part of a metaphorical expression in more than 90 percent of the cases (Davies, 2008). This opens the door to a metaphorical analysis to, say, investigate the different targets of villainization or opposition expressed by the metaphorical construction ‘fight against (SOMETHING)’ over-time. Alternatively, the full construction can be searched, in all its relevant forms (e.g. ‘fight against (COVID/the Coronavirus/the pandemic)'), which would be a great start for a dictionary to detect the theoretically relevant war metaphor in the context of COVID-19 (Castro Seixas, 2021).

Computerized text analysis methods are probabilistic in nature (Tausczik and Pennebaker, 2010). Table 27.1 purposefully included one sentence where ‘fight’ is used metaphorically to speak of the Coronavirus without adopting the ‘fight against (COVID)’ construction, possibly because it is embedded in an already extended metaphor (‘on the frontline to combat...’). The possibility of errors of inclusion or omission when detecting metaphors automatically does not take away from the value of the method, but it does emphasize again the importance of maintaining a back-and-forth dialogue between automated analysis and visualization. The qualitative researcher’s goal should be not to entirely avoid miscategorization, but to be aware

of the skews of the method and, when possible, to fall on the side of conservative. While ‘fight against COVID’ is certainly not the only way to metaphorically wage war upon the pandemic, it is a sure way to find one.

### **Extending the Application of Constructions in ATA: The Case of Snowclones**

A linguistic construction that can illustrate the usefulness of the previous methods beyond figurative language is the snowclone – a type of clichéd phrase or expression that is created by adapting a previously established formulaic phrase. The term was inspired by the journalistic cliché ‘If Eskimos have N words for snow, X have as many for Y’, where X and Y have been ‘Germans’ and ‘bureaucracy’, or ‘auto manufacturers’ and ‘beige’ (Pullum, 2004). Linguist Geoffrey Pullum noted that, despite the outdated name for the Inuit and the dubious factuality of the statement (which explains that N varies from 10 to 500), this sentence was often repurposed by writers to fit their goals.

Much like a linguistic meme (Hartmann and Ungerer, 2021), a snowclone provides an easy and recognizable template with fill-in-the-blank slots to allow for customization. By nature, snowclones split the difference between purely rigid idioms and the relatively more flexible metaphorical expressions in the previous section. Snowclones are a convenient way to study current market conversation because of the rich, often metaphorical meanings and their viral tendency. Take the construction ‘X is the new Y’. Given the love of journalists and blog writers for these clichéd expressions, it can be used to monitor fashion trends (doing so, I learned that ‘yellow is the new pink’ for Gen Z (Harrison, 2021)). However, we could also use snowclones to explore consumer metaphors that reveal obsolescence and replacement, even in unexpected places. For example, in plumbing the phrase, ‘TikTok is the new Y’, I discovered:

- TikTok is the new feedback form
- TikTok is the new Facebook
- TikTok is the new MTV
- TikTok is the new Google

The previous example is particularly illuminating given the importance of analogy and metaphor on consumers’ understanding of completely new products (Gregan-Paxton et al., 2002). A similar snowclone is ‘X is the Y of Z’ as in ‘Blockbuster was the McDonald’s of video’. Contemporary uses of this expression reveal that Netflix, Tesla and Coinbase have been often called the Apple of their respective industries (e.g. ‘Tesla is the Apple of electric cars’; Davies, 2008). Certainly, consumer perceptions change quickly, and the cultural meaning of ‘the Apple of (INDUSTRY)’ will certainly change when the brand loses its throne as the paradigm of innovation.

Of course, interpretation of these fixed constructions depends on deeper qualitative insight than a simple search. An understanding of gaming culture and discourse reveals that ‘EA (Electronic Arts) is the McDonald’s of gaming’ (Davies, 2008) is not generally intended as a flattering statement, but as a denouncement of the monopolistic nature of the company and the negative influence that its mass-market philosophy has over the industry. Contrast this example with ‘(GAME) is the Dark Souls of (GENRE)’, which is often said to highlight a game’s difficulty, but in a positive, almost reverential way. Even seemingly straightforward snowclones such as ‘X is the king of Y’ or ‘the mother/father of all X’ can have nuanced meanings that call for a contextual, discourse analytic inspection beyond its quantification.

## SUMMARY AND CONCLUSION

This chapter has described and illustrated approaches (both theoretical and methodological) to study metaphors in market discourse from large textual databases. Metaphors play a key epistemological role in marketing, and have proved to be an illuminating phenomenon at the interplay between cognition and culture (Coulter et al., 2001; Cornelissen, 2003; Hirschman, 2007; Lakoff and Johnson, 1980b). To shed light on this topic, I have also advocated for a balance between computerized text analysis methods and qualitative insight, as well as making a linguistic theory-based argument for moving beyond individual words in dictionary analysis and other automated text analysis methods. The most sophisticated advances in Natural Language Processing, such as Chat AI, have already benefited from the statistical predictability of language and abundance of relatively fixed multiword constructions. There is also an opportunity for sociocultural researchers who take advantage of computerized text analysis methods. While this chapter has focused on the concrete case of metaphors, the phenomenon of snowclones illustrates the wider usefulness of the methodological lessons in this chapter. Armed with qualitative-enhanced ATA, marketing researchers are in a better position to listen to the voice of market.

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## PART IV

# APPLICATIONS

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## 28. Qualitative advertising research

*Michelle R. Nelson and Kirby Cook*

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### INTRODUCTION

A transformation in the media landscape within the past 30 years has resulted in new forms of advertising and new ways for scholars and practitioners to access consumer data, including conversations about advertising. The rise of digital and social media since the first banner ad in 1994, and a decade later with the launch of Facebook, YouTube and Twitter, altered the ways people engage with advertising, allowing interactivity and the development of online relationships with brands and their persuasion agents. New agents, including virtual influencers and artificial intelligence (e.g. ChatGPT), raise new questions about authenticity and ethics. At the same time, we are witnessing vast changes in how people access and consume media, including multiplatform media consumption and the growth in streaming content with and without advertising. Despite people's avoidance of advertising, it remains a significant part of the global economy: advertising spending worldwide is predicted to reach almost 885 billion dollars by the end of 2024 (Navarro, 2023). Understanding advertising – as text, as persuasion technique, as professional practice – is an important context for scholars in marketing, advertising and beyond.

These changes in media have altered the very definition of advertising, which has historically been presented as 'a paid, mediated form of communication from an identifiable source, designed to persuade the receiver to take some action, now or in the future' (Richards and Curran, 2002, 74), with a focus on 'paid' and 'persuasion'. More recently scholars propose the very broad definition of 'brand initiated communication intent on impacting people' (Dahlen and Rosengren, 2016, 334). The expansion of the term 'advertising' provides for new contexts to study and new ways to better understand how consumers engage with brand communications. At the same time, it is telling that these definitions share a focus on impact and persuasion, suggesting a psychological and media-effects type of scholarly approach. It's not surprising then that quantitative methods are most commonly applied in advertising research (Kim et al., 2014).

Yet within this backdrop of big data and online media, qualitative research in advertising is needed more than ever (Belk, 2017). Algorithms may improve advertising effectiveness in terms of media placement, behavioral tracking or message testing. Yet, the *why* behind these numbers and the ways people engage with and make meaning of advertising are lacking in a quantitative approach (De Pelsmacker, 2021).

The purpose of our chapter is to review the prevalence and use of qualitative methods in advertising, highlighting the ways that qualitative methods have illuminated our understanding of all forms of advertising. We begin by presenting a brief evolution into the use of qualitative methods in advertising research then we transition to our own review of the more contemporary uses of qualitative research from 2011 to 2022. Finally, we cover in more detail the range of qualitative methods used to understand people and the ways people ascribe meaning, perceive or talk about advertisements, analyze the meanings within the advertising texts, gain consumer insights for advertising development and access the perceptions and lived experiences of advertising professionals.

## EVOLUTION OF THE USE OF QUALITATIVE METHODS IN ADVERTISING RESEARCH

The first known advertising research study was a ‘psychological investigation of advertising’ via a survey sent to business leaders in 1895 by Professor Howard Gale at the University of Minnesota (Eighmey and Sar, 2007). The survey listed advertising media at the time (e.g. magazines, newspapers/handbills/posters, show windows, painted signs/placards) and then included open-ended queries such as ‘What are the best ways you have found in your experience for attracting attention under these four ways of advertising?’ This method has been referred to as ‘quasi’-qualitative data (Nuttall et al., 2011). The findings provided key insights for Gale as he went on to design the first academic experiments in advertising, in this case to gauge which advertising elements attract attention. A focus on industry practitioners remains in advertising research more than 125 years later with a wider range of methods (e.g. ethnography: Ghaffari et al., 2019; interviews: Phillips et al., 2014).

The focus on the psychology of advertising also remains, with the parents of the field of advertising as psychology, commerce and journalism (Chang, 2017). The positivism paradigm is the norm in advertising research (Chang, 2017) and in aligned fields of communication and marketing (e.g. Avant et al., 2017; Kim et al., 2014). Avant et al.’s (2017) analysis of communication and marketing journals from 1980 to 2010 showed that most studies featured quantitative methods (85.2 percent) with communication journals showing relatively more quantitative studies (87.9 percent) as compared with marketing journals (84.3 percent).

Kim et al. (2014) reviewed methods for advertising and marketing communication journals from 1980 to 2010. The majority of studies in their sample were also quantitative (75.1 percent). Around the same time period, Nuttall et al. (2011) examined 50 years of articles published in *Journal of Advertising Research* from its inception in 1965 through 2010. Out of 2023 papers, only 2 percent used qualitative methods. Several scholars have identified this gap in the use of qualitative methods in advertising research (De Pelsmacker, 2021; Rodgers and Belobrovkina, 2022) and have urged attention to grounded theory approaches (e.g. Goulding, 2017).

Despite the hegemony of quantitative approaches, Scott (2006) writes of the interpretive turn in the 1980s with a notable shift toward understanding consumption, reader response and professional creation of advertisements, as well as a widening perspective of advertising as art and as a product of social influence. This shift allowed scholars to move beyond positivism and the view of passive consumers to see the consumer as an ‘empowered, grounded, thoughtful human with better things to do than watch ads’ (Scott, 2006, 60). Scholars in this realm employ a *meaning-based* approach where consumers actively construct ‘a variety of meanings as outcomes of personal interest-driven, culturally situated act of advertising interpretation’ (Mick and Buhl, 1992, 317). These meanings are bound within the context of the consumer’s life history and the embedded signs and denotative content within the advertising text itself. Thus, advertisements in this approach are regarded beyond their informational or persuasive powers to become an integral part of consumers’ mediated lives and reality.

In a classic study, Mick and Buhl (1992) conducted phenomenological interviews to understand the life themes and life projects of three Danish brothers and their experiences of advertising as they interpret five advertisements. The respective life themes of these brothers were reflected in their idiosyncratic readings of the advertising in terms of the brands or products as well as the executional elements of the ads. Although the brothers shared a common back-

ground and interest in social status, the varied readings for the Lezard brand suit ad revealed the ways in which the meanings of ads vary according to the brothers' individual life histories. These meanings were not solely derived by the creator's intentional meaning but by the unique life context of the readers.

This empowered consumer paradigm adds multiple levels of complexity to advertising research, as scholars must also consider cultural context, multifaceted identity and how messages fit in, interact or conflict within larger societal conversations. Within consumer research, Arnould and Thompson (2005) presented Consumer Culture Theory (CCT) as an umbrella term referring to the wide range of research examining the 'dynamic relationships between consumer actions, the marketplace, and cultural meanings' (868). CCT presents intersecting perspectives in framing how consumers interact with and perceive such offerings in relation to communities, experiences, products and services. This intersectionality of multiple levels (e.g. consumer identity, sociocultural) reflects the dynamism of consumption and context within a specific lens while also acknowledging the boundaries of consumers' lived experiences.

Within the field of advertising research, qualitative inquiries have continued to make substantial theoretical contributions to CCT through exploration of advertising's intersection with consumers within their respective communities and perspectives (Belk, 2017). For example, Scaraboto and Fischer (2013) conducted a three-year netnography of the online plus-sized fashion community. The researchers collected materials, observed online interactions, reviewed media and participated in community forums. From their extensive study, the authors illuminate valuable insights, ultimately providing significant cultural context for understanding the inner and outer workings of the plus-sized fashion community. They uncovered how advertising and media can equally promote yet exclude certain demographics, and most importantly, how consumer resilience led to the creation of an alternative space of inclusion. Thus, the interpretive turn with a meaning-based approach and CCT play a vital role in understanding the *who* behind 'them' and the *how* behind 'what' found in quantitative study. Despite the promise of interpretive research, there have been few studies using qualitative methods in advertising research.

## CONTEMPORARY USES OF QUALITATIVE RESEARCH METHODS (2011–2022)

We were curious if the prevalence and types of qualitative methods had changed in advertising research. We examined 1346 articles published in four major advertising journals (*Journal of Advertising*, *Journal of Advertising Research*, *Journal of Current Issues and Research in Advertising*, *Journal of Interactive Advertising*) from 2011 to 2022. The authors, along with a graduate student, reviewed the articles for method (i.e. quantitative vs. qualitative or mixed; and if qualitative, which method; Avant et al., 2017) to identify papers where qualitative data was fundamental to the conceptual or theoretical contribution of the paper (Nuttall et al., 2011). We selected 2011 as the starting point since other reviews (e.g. Avant et al., 2017; Kim et al., 2014; Nuttall et al., 2011) ended with 2010. Our findings revealed that, overall, there is not much qualitative research in advertising journals, with large variation. See Table 28.1.

The *Journal of Current Issues and Research in Advertising* featured the greatest proportion of qualitative methods at almost 14 percent, whereas the *Journal of Interactive Advertising* featured only seven of 152 articles (4.6 percent) and the *Journal of Advertising Research*

*Table 28.1 Analysis of qualitative methods in advertising journals (2011–2022)*

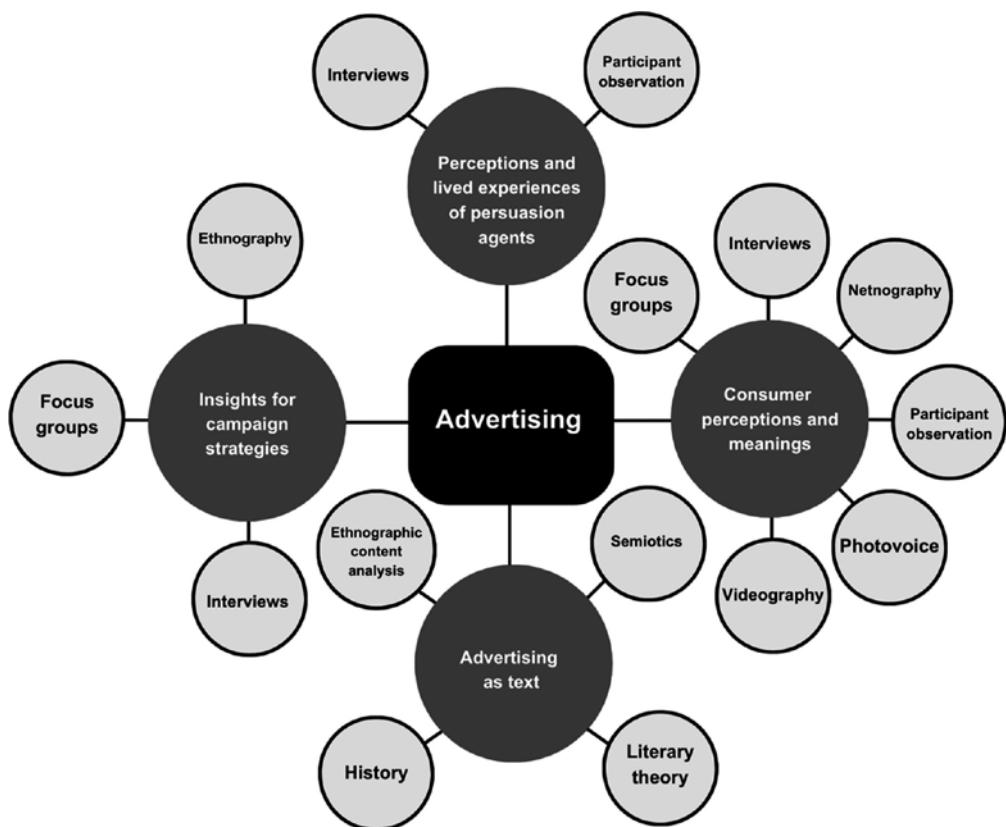
Journal	Total Articles Reviewed	Total Qualitative Only	Total Mixed Method	Most Common Qualitative Methods
Journal of Advertising	425	24 (5.6%)	9 (2.1%)	Interviews, ethnography, netnography
Journal of Advertising Research	585	11 (1.9%)	35 (6.0%)	Interviews, focus groups
Journal of Current Issues and Research in Advertising	184	25 (13.6%)	0	Interviews, ethnography
Journal of Interactive Advertising	152	7 (4.6%)	3 (2.0%)	Interviews, netnography
Totals	1,346	67 (5.0%)	47 (3.5%)	

featured qualitative methods in 11 (out of 585 articles, about 1.9 percent). According to our review, 33 (out of 425, 5.6 percent) articles in the *Journal of Advertising* (*JA*) contained qualitative methods in a main study, along with an additional four that included qualitative as an exploratory step toward initial understanding or stimuli development. There were articles in *JA* that discussed qualitative contributions and value (Belk, 2017; Goulding, 2017; Stewart and Shamdasani, 2017). Interviews were the most common method across journals.

Why do so few articles feature qualitative methods? There may be several factors that discourage qualitative research in the advertising field, such as the discipline ideology or lack of training (De Pelsmacker, 2021) or perhaps the inherent preference of editors and reviewers for top-down theory and statistics (Kerr and Schultz, 2010). The amount of time in the field and resources required for qualitative research may prohibit some scholars from pursuing this method. We hope by highlighting the ways that qualitative research is being used, more scholars will take up a qualitative approach.

## HOW QUALITATIVE METHODS ARE USED IN ADVERTISING RESEARCH

The advantages of qualitative methods are their ‘great openness and freedom in the research process’ (Eisend and Kuss, 2019, 222). Our review reveals a wide range of qualitative methods, which are used to (1) understand people and the ways they ascribe meaning, perceive or talk about advertisements; (2) analyze meanings within the advertising texts; (3) gain consumer insights for advertising campaign development; and (4) explore perceptions of advertising professionals and learn about how they operate in professional settings (see Figure 28.1). Qualitative methods are also used in scale development, initial stages of social media analysis, and in multimethod studies.



*Figure 28.1 How qualitative methods are used in advertising research*

## CONSUMER PERCEPTIONS AND MEANINGS OF ADVERTISING

The majority of studies using qualitative methods focus on people's interpretation of advertisements. Interviews are especially common to elicit reader response (Scott, 1994) in the form of understandings, perceptions and meanings derived from the advertising text, with focus on societal issues and purposive sampling. For example, scholars seek to understand how audiences such as 'men who like fashion' (Barry and Phillips, 2016), women with visual impairments (Houston, 2022), mixed-race consumers (Harrison et al., 2017), gays and lesbians (Tsai, 2011) or older women (Phillips, 2022) make meaning and respond to spokesperson portrayals in advertising.

In an innovative study with members of the LGBTQ+ community, Rodgers and Belobrovkina (2022) introduce the method of photovoice, a form of community-based participatory research where participants take photographs on a given topic and write an associated narrative before sharing the photos and insights. Participants took pictures of perceived ethical or unethical advertisements targeting the LGBTQ+ community. By allowing the participants greater authority in the research process, this unique method uncovers novel aspects of advertising

response (e.g. the normative use of sexuality and relationships, race/ethnicity and stereotyping). In another study, interviews and ad sorting activities with men and women who were shown advertisements featuring women revealed discussions about new forms of female power (e.g. family, sexual, athletic; Kordrostami and Lacznak, 2022).

Exploring audience response to specific advertising tactics is another common area of study, such as gauging Millennials' feedback to native advertising in social media (Youn and Kim, 2019), teens' perceptions of the moral advertising literacy of influencer marketing (Sweeney et al., 2022), or using focus groups with Arab consumers to gauge their preferences for language and values in digital messaging (Benmamoun et al., 2019). In a fascinating study, Caulfield et al. (2021) interview younger and older people to get a sense of their perceptions of portrayals of death in advertising for non-death-related products. Findings reveal age differences in response: younger people were apprehensive of this technique initially but then appreciated the humor or unrealistic situations (e.g. nonhuman characters) in the actual advertisements, whereas older people were more accepting of death overall, but wanted the ads to portray death more tastefully.

Beyond asking questions directly to people, netnography (ethnography of the internet; Kozinets, 2002 and this volume) allows scholars to perceive what people are saying about, and how they react to, advertising online. This more naturalistic method provides scholars with reactions and behaviors toward advertising and evidence of their engagement. For example, Grant et al. (2015) review audience comments to three branded 'flash mob' advertising cases on YouTube. Their discourse analysis of consumer comments revealed common areas of discussion (e.g. perceptions of the brand, commercial or people in the commercial; the actual flash mob performance). Based on the quantitative and qualitative analysis of comments, the authors construct a typology to show how antagonistic and supportive comments relate to the attitudes toward the ad and brand.

Observing the ways people talk about ads also occurs in the form of participant ethnography. In one study (Ritson and Elliott, 1999), Ritson acted as a participant observer, serving as a media teacher for adolescents in schools. He was able to observe these adolescents in and out of the classroom and interview 68 students. What he discovered was spontaneous discussions of advertising (e.g. mimicking ads, singing jingles), revealing how advertising provided shared meaning, as popular culture critique, and served as a way to create group identification. Essentially, the study shows how advertising emerges as a topic worthy of conversation in the social worlds of teens in the mass-mediated 1990s.

Machines have been used to supplement in-person observation, especially when examining media context and advertising reception. For example, Jayasinghe and Ritson (2013) use video recording in family living rooms as part of their multimethod study to better understand what people really do when commercials air on television. Their analysis of '3800 minutes of video clips of viewer behavior, filmed over the 1250 television program breaks that occurred during the recording period across the eight homes' (107), coupled with interviews of the families, revealed commercial time provided time for family interactions and multitasking. Far from what advertisers hope for – and what might be collected using traditional audience metrics – participants paid little attention to the actual advertisements. Observation studies allow scholars the opportunity to understand the social context of advertising and the ways in which people engage with advertising (or not!).

## INSIGHTS FOR CAMPAIGN STRATEGIES

Qualitative methods are used to uncover consumer insights to create strategic advertising campaigns in advertising research and practice. Commonly, the campaigns studied in academic journals are for social or health issues. For example, Wolburg and Gilkerson (2019) interviewed 20 US college students to understand the meaning of turning 21 years old. Using a ritual behavior model, the authors asked participants the key elements of a 21st birthday event. Their analysis of interview data uncovered deeper understanding of drinking culture with the novel discovery of the important role of friends as party planners, indulgence creators and saviors. This insight led the authors to suggest that social marketing campaigns should not be solely focused on the birthday celebrant. Rather, more efficacious campaign strategy might target friends or engender creative ways to change social norms around this birthday drinking ritual.

The development, design and evaluation of the ‘truth’ campaign against tobacco consumption was presented as a three-phase longitudinal case study (Vallone et al., 2016). The authors conducted extensive formative research with their Generation-Z target audience, including focus groups, family ethnographies and interviews. Insights from this research relate to distinctions in perceptions for smokers versus social smokers and interest in social change. This information led to the development of the ‘truth initiative’ creative strategy, which was framed as a social movement as opposed to a health information campaign.

## ANALYZING ADVERTISING AS TEXT

Whereas most qualitative research in advertising focuses on human perceptions, some studies provide analysis of the advertisements themselves, through interpretive approaches from application of feminist or literary theory, to semiotics, to interpretation and theming of the advertisements. These forms of literary textual analysis can be characterized, as noted in McQuarrie et al. (2013), as the fourth theme in CCT (Arnould and Thompson, 2005).

In a classic article in this area, Stern (1993) introduces and applies literary theory to deconstruct advertising by interrogating ‘advertising text (what), about the consumer (who), and about the response process (how)’ (556). Stern illustrates how to adapt feminist theory to allow for gendered readings of advertising text by asking the reader to consider sex reversals in the literary reading of the Marlboro Man and the Dakota Woman (the female analogue to Marlboro Man).

Fowler and Close (2012) conduct an ethnographic content analysis to ascertain the gaps in competing agendas for green advertising, before the authors interviewed consumers (Fowler III and Close, 2012). The text analysis relies on constant comparison analysis as such: ‘the advertisements were observed, interviewed, and analyzed much as one would observe, interview, and analyze individuals in the field’ (122). This analysis revealed common themes in green advertising such as ‘save the planet’, ‘stop global warming’ often featuring arctic animals, stop pollution or ‘save ourselves’. At the brand level (brand), the promotion strategy focused on the brand and its green initiatives or claims.

Champlin et al. (2019) analyze 19 commercials that received a #Femvertising Award to explore the messaging strategies and classify how brands celebrate female empowerment (Champlin et al., 2019). The scholars reviewed media for initial themes and topics and

discussed these ideas as a group, then examined the advertisements with these themes in mind, taking notes while viewing, interpreting and responding to the commercials. After this process, the researchers developed a five-category coding guide to characterize the ads with 'high' versus 'low' fit (i.e. fit between social topic and target audience) brands. This process revealed examples of both high fit (e.g. Dove) and low fit (e.g. Dodge Ram), highlighting the use of empathy in message strategy.

Historical approaches, considered to be 'the oldest qualitative method' (Brennen, 2017), are rare in advertising research, but can inform our understanding of advertising text as well as broader societal issues. For example, Holiday (2018) examines issues of the children's magazine *Jack and Jill* from 1938 to 1948, as well as memos and publisher notes during this period. Although the magazine proclaimed it did not publish advertising toward its young audience, Holiday revealed several instances of nontraditional advertising sponsored by the US Treasury – showing persuasive and commercial content – in the 'United We Stand' campaign (1942–5). The author suggests the historical approach helps illuminate commercial influences on children and reminds us of the ways that definitions of advertising have evolved.

The journal *Advertising & Society Quarterly* also offers research with historical approaches. For example, Nelson et al.'s (2020) analysis of hundreds of print advertisements of fruits and vegetables from the early twentieth century revealed that, during this time of post-patent advertising fallout and the Truth in Advertising movement, advertisers used pseudoscientific tactics to gain credibility. For example, they often advertised produce as 'medicine' (e.g. recommending daily doses to ward off or cure medical ailments such as landlubber scurvy).

Beyond traditional forms, new forms of advertising texts emerge in contemporary research. For example, Phillips et al. (2014) characterize the social media site Pinterest as an indirect form of persuasion and analyze the visual texts in 20 Pinterest boards (2291 images) as well as the captions and titles. Using the constant-comparison method, the authors reveal unique insights into the principles and practice of 'pin' construction. For example, Pinterest boards are typically future-oriented, showcasing both aspiration and inspiration with associated characteristics and principles of assembly. Fashion blogs were analyzed as an authentic way to showcase fashion and amplify messaging in McQuarrie et al. (2013). The authors analyze the verbal and visible aspects of ten women's fashion blogs' posts and audience comments, focusing on examples of how taste is displayed. The analysis shows the evolution of blogs that began as online journals from ordinary consumers, to carefully crafted professional-looking forums cultivated by bloggers as 'taste makers' to amass larger audiences and integrate into the fashion industry.

## PERCEPTIONS AND LIVED EXPERIENCES OF PERSUASION AGENTS

Understanding the people and practices of those who create persuasive messages – the persuasion agents (Friestad and Wright, 1994) – is a common area of study using qualitative methods. As Scott (2006) argues, advertising professionals should be included in the academic conversation, as their lived experiences provide perspectives on practical application.

Given the importance of creativity in advertising, it is not surprising that interviews with creative agency personnel are common. One of the earliest studies involved interviews with 20 copywriters to gain a sense of whether they had their own implicit theories for advertising

communication (Kover, 1995). Evidence of such theories was found, as well as the unique insight that copywriters imagine their readers and engage in a ‘dialogue’ with them when creating copy. Subsequent studies in this area include interviews with creative agency personnel to see how creatives use ‘Google’ search in the creative process (Barker, 2018) and interviews with 35 women creatives in Spain and the US to explore how the cultural environment frames experiences in the industry (Grow et al., 2012).

Phillips et al. (2014) conducted interviews with art directors in advertising agencies to see how they define and produce visual brand identity, and integrated specific visual prompts into the interviews. Analysis of these conversations revealed how art directors share common ideas as to how visual brand identity forms, based on client mandatories, existence of a strong or weak brand identity, client-agency conflict and personal preferences among creatives.

Participant observation in advertising agencies allows scholars first-hand insights into the lived experiences and working practices of those in the industry. For example, Ghaffari et al. (2019) spent nine months observing agency practices and conducting interviews at an international advertising agency in Iran to better understand the process and relationships that contribute to ‘creative output’. Their analysis of interviews and field notes illuminates three forms of power: control power, knowledge power and persuasive power. Importantly, the ethnographic view allows insights into the everyday work of creativity as a practice, and the negotiation and power relationships between agency creatives and their clients. Another long-term (two-year) ethnographic, multimethod study was conducted with a Swedish retailer and their IMC partners (Ots and Nyilasy, 2015). This study involved 26 interviews, analysis of written documents from campaigns, and participant observation at meetings. The authors were able to document evidence for why the IMC process doesn’t always work in practice.

A third area of research among practitioners relates to agency executives’ perceptions toward broader issues. For example, Shao et al. (2014) and Windels (2016) explore stereotypes and gender in advertising. Chen and Zhou (2018) highlight professionals’ ideas about industry trends such as ‘big data’ in China, whereas Okazaki and Mueller (2011) ask practitioners about changes in advertising in Japan. Beyond advertising and marketing executives, persuasion agents exist in new forms these days, such as influencers. Jacobson and Harrison (2022) interview 20 women sustainable fashion social media influencers to explore their everyday content-creation processes and strategies, and to learn about monetization. Seeking out new persuasion agents and the ways they operate offers new areas of qualitative research.

## THE FUTURE

Our chapter offers a snapshot of qualitative research in advertising, with apologies to the authors and studies not covered here. Advertising provides an interesting and worthwhile context to study, and there is opportunity for increased use of qualitative methods to inspire creativity and novel ideas (De Pelsmacker, 2021), to build and advance theory (Goulding, 2017; Rodgers and Belobrovkina, 2022), and to probe the ‘why’ and human understanding in a world that is increasingly online. Methods are being developed to better capture how people talk about brands and advertising (e.g. netnography; Kozinets, 2006). Perhaps accelerated by the COVID-19 pandemic, other traditional methods used in qualitative research in advertising are finding new life in online versions such as synchronous and asynchronous focus groups

(Stewart and Shamdasani, 2017), virtual interviews or instant messaging interviews and mobile ethnography.

Our review reveals that interviews remain the most common method used in advertising research, yet there are many ways to view advertising text, gauge consumer response, and understand how persuasion agents create and understand advertising. Due to the affordances provided by new technology (e.g. ChatGPT) and dynamic platforms (e.g. TikTok), human interactions are bound to evolve; thus, the ways individuals communicate, as well as perceive and react to such changes will continue to demand qualitative inquiry. While algorithms offer formulas and deliver numbers about the *who*, *what* and *when*, qualitative methods provide further exploration – and acknowledgement – of consumers' cultures, experiences and motivations. Adapting to emerging technology and the merging of old and new warrants us, as advertising scholars, to do the same: we must stay diligent in our approach to understanding how new forms of messaging work, and ultimately, how our interactions with these messages affect our perception of the world.

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## 29. Researching the cultural roles of brands

*Jacob Östberg and Benjamin Hartmann*

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### INTRODUCTION

Brands have emerged as culturally important symbols. Not only do they offer a source of competitive advantage for marketers, but they also matter deeply for individual consumers, groups of consumers, and on a societal level for collective identities and other macro-social projects and negotiations. In short, brands play an important role in contemporary consumer cultures. Thus, the study of brands has become a matter of central concern to marketing scholars around the world. From the perspective of brand management, studying brands and branding then becomes a matter of analyzing and systematizing the strategies through which brands are created and managed, as well as their effects on consumers, and thereby, firm performance.

In this chapter, we focus on researching the cultural role of brands, however. Such research seeks to capture the cultural richness of brand meanings in contemporary consumer culture. The curiosity in the cultural roles of brands implies to appreciate brands as culturally constructed symbols, created by various types of authors who furnish them with symbolic content that is highly bound to context and time. While conventional brand management literature has a tendency to portray the production of brand meaning as a one-way communication process in which sets of marketer-constructed brand identities are decoded by consumers into corresponding brand images, a research interest in the cultural roles of brands understands brands as dialectically constructed through iterative processes between various actors (Giesler, 2012). Indeed, this is a perspective that has also been integrated to more progressive brand management textbooks, as indicated by the subtitle of Beverland's book on the topic 'co-creating meaningful brands' (2021), to mention one example.

The widened view of looking at brands – from management tools to important cultural symbols – has some important implications for the ways brands must be studied. Many of the research methods described in the chapters of this book have previously been applied to research on brands. In this chapter, we aim to (1) briefly review the main theoretical approaches used when studying brands, (2) look at the different methods that have been applied when researching the cultures of brands, and (3) point at some of the pitfalls related to researching brands and how to avoid them.

### WHAT ARE BRANDS AND BRANDING?

Since the chapter is dealing with approaches and perspectives for researching brands empirically, it seems pertinent to elaborate on what we mean when we use the term brand. Formally, according to the American Marketing Association (AMA), a brand is defined as 'a name, term, design, symbol, or any other feature that identifies one seller's goods or service as distinct from those of other sellers (<https://www.ama.org/topics/branding/>)'. This definition of a brand, adopted by standard marketing textbooks, covers the branding of most items offered

on the market because even seemingly generic market offerings carry some elements, such as a name or design, that distinguish them from other market offerings. One should be careful, however, to make the assumption that consumers understand the concept of brand in the same way as it is formally defined by marketing textbooks. There are plenty of brands circulating in consumer culture, and hence in consumers' lives, that might not be recognized and thought about as 'brands' per se, for example since they might not play a crucial part in consumers' identity projects (Coupland, 2005). So, although a symbol can formally be considered a brand, it is important to be sensitive to how consumers as well as other cultural actors understand the concept of 'brands'. Not the least if one aims to research the cultural roles of brands.

While there is a prominence of brands in consumer culture, brand management as an organizational practice has also developed into a management fashion where not only goods and services but entire companies, places – from neighborhoods to cities, regions, countries and supranational entities – universities, museums, NGOs, artists, individuals and practically everything else is possible to brand. The great market success of the abundant variety of practical how-to branding books furthermore illustrates that brand management is considered a key competence in contemporary businesses. With the increasing interest in branding as an organizational practice, branding has gradually changed from solely referring to marketing activities that add symbolic values to products, to a general management philosophy that permeates entire organizations.

One consequence of this diffusion of brands into all spheres of commercial and noncommercial life is that brands and branding appear in a wide variety of different ways. Some brands are primarily signifiers for physical products whereas others are less tangible and signify processes or spaces. In addition, brands are often not just devices that create relationships between a company and consumers, but involve many other stakeholders such as employees, investors, suppliers, partners, regulators, special interests and local communities (Beverland, 2021). As a consequence, branding as a phenomenon is more complex and requires attention both to the company's strategic vision, its corporate culture and its contemporary status in the consumer culture. Given that the application of brands and branding has evolved to include so many different aspects of the market, there are several perspectives – both conceptually and empirically – from which brands can be researched. But that is not the sole reason to widen the scope of how we research brands. Brands have never been as simple as they were perhaps thought to be at the early days of branding research. Over the last century, brands have developed into something far more important and complex in contemporary culture than merely marketing tools, they have become 'desire-inducing marketing symbols' (Arnould and Thompson, 2005, 869).

## THE CULTURAL PRODUCTION OF THE BRAND

Much of existing brand management research has focused on the strategies and tactics through which successful brands were built. The lion's share of this work is of the 'best practice' type, where descriptions of successful brand building activities are presented and turned into normative accounts of how brand building should take place. The literature on brand management consists of a myriad of normative frameworks that provide managers with *the* prescription for how to win and dominate markets with powerful value-added brands. Some of the dominant classical brand management frameworks or principles, such as brand equity

(Keller and Swaminathan, 2019) and brand identity (Kapferer, 2004), were developed through case studies of companies' branding strategies and provide guidance for brand building work based on best practice.

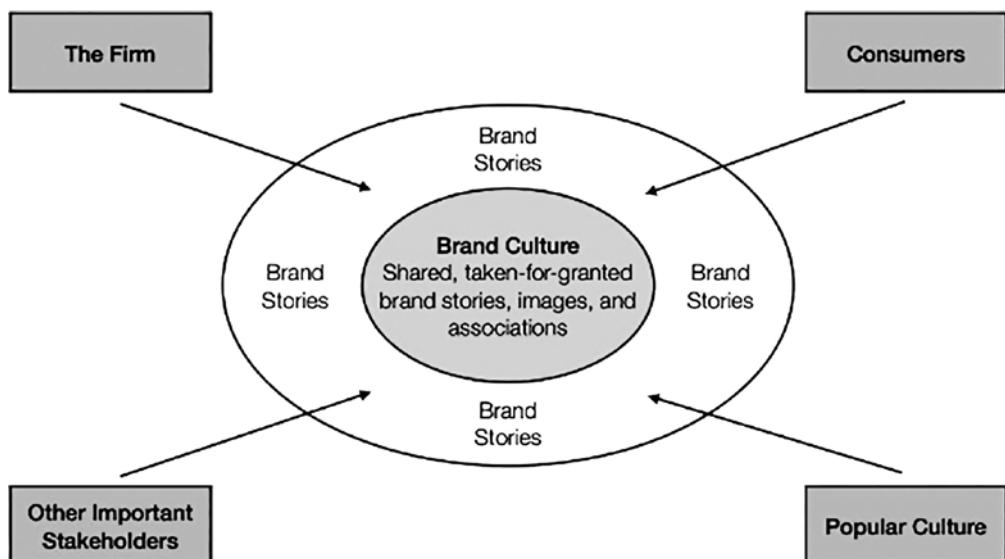
This type of brand research focuses on the actions of companies, implying that empirical data about the strategies is gathered through collection of communication campaigns, interviews with managers, other employees and the company's market communication agencies. In addition, common sources for empirical data are annual reports, newspapers and periodicals, where accounts of the brand's success and failure occur. Contemporary research on brand management often assumes that brand owners exert considerable control over their brands: a company communicates a certain brand identity that is more or less correctly interpreted by consumers as a brand image. However, the metaphor of the brand manager as an alchemist who can mix and match components to achieve a desirable outcome relies on an overly simplified view of the cultural role of brands.

Instead of the company-centric view, we follow Holt's (2002a) proposition that 'brand culture' – here understood as shared taken-for-granted brand stories, images and associations – is constructed by various 'authors', as illustrated in Figure 29.1 According to this view, brand culture is co-constructed by the i) firm, ii) consumers, iii) popular culture, and iv) other important stakeholders.<sup>1</sup> The firm that has given birth to the brand by putting it on the market is indeed a significant actor and plenty can be learnt from classical brand management research of how this works. Strategic, carefully tuned brand building activities generate stories about the brand along with the everyday actions the company undertakes in order to sustain its brand identity and subsequent brand equity. The ultimate users of the brand, consumers or organizations, are other significant actors that contribute to brand culture. Through consumption, the particular status, uses and meanings of brands are subject to constant social negotiations, which in turn contribute to brand stories. In addition to these two actors, brand culture is also produced by popular culture such as TV programs, magazines, movies and books. Finally, other important stakeholders include authors such as competitors, labor unions, consumer-rights groups and retailers.

Each group of authors produce stories about the brand that all contribute to the overall 'brand culture'. The ensuing brand culture is not homogenous but is often fragmented. Different groups have different interpretations and understandings of what a brand stands for; brands are polysemic (Berthon et al., 2009). Rather than trying to find the essential meaning of a brand, it is therefore more appropriate to understand brands as polysemic entities whose peculiarities need to be examined from different perspectives. In the following, we provide some examples of how research has looked at brands from various different vantage points and levels of abstraction.

## RESEARCHING BRANDS AT DIFFERENT LEVELS OF ANALYSIS

To research the cultural role of brands, it makes sense to contemplate appropriate levels of analysis. The 'authors of the brand' model above reminds us of the various parties involved in the creation and valorization of brands. Not only are many parties involved in creating brands, but brands themselves also play roles on different levels, which are, crucially, often interconnected. Because brands are important resources and actors in consumer culture, it is useful to revisit Arnould and Thompson's (2005, 875) description of consumer culture theoretical research as striving to 'systematically link individual level (or idiographic) meanings to different levels of cultural processes and structure and then to situate these relationships



Source: Adapted from Holt, 2002a.

*Figure 29.1 The authors of the brand*

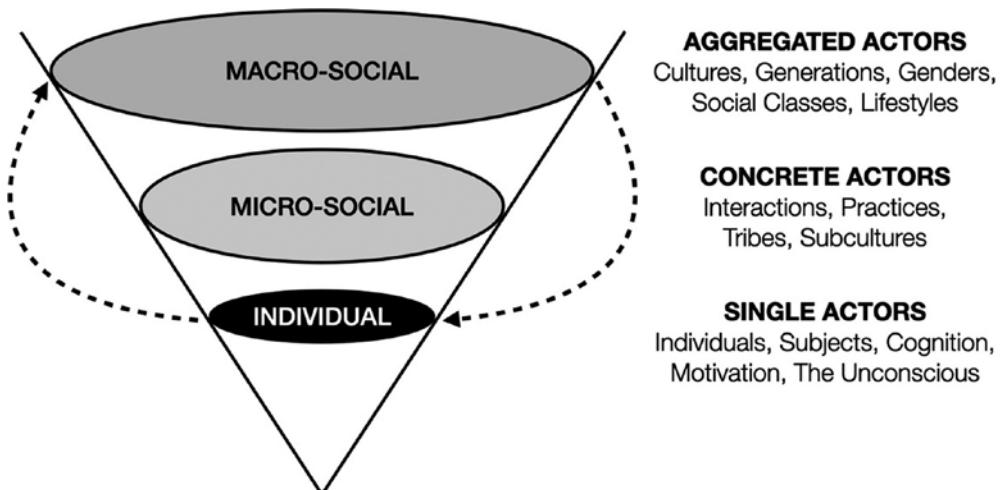
within historical and marketplace contexts'. Following this idea, we can conceive of brands as playing a role on many levels, ranging from the individual consumer, to various more macro-social processes and structures.

To research the cultural roles of brands, we can draw inspiration from Cova and Cova's (2002) adaptation of Desjeux's (1996) idea of scales of observation. Translated to the context of this chapter, we suggest that a useful starting point for researching the cultural role of brands is to conceptualize them as operating on the individual, the micro-social, and the macro-social level. These levels are depicted in Figure 29.2.

It is important to note that these levels of analysis are best understood as starting points to attempt to reduce complexity when recognizing the interplay between individual-level consumer experiences and more hidden macro-social processes (Askegaard and Linnet, 2011). As Desjeux (2021) points out, studies at different levels of observation might yield rather distinct results that might sometimes appear contradictory as far as 'what one observes at one scale vanishes at another scale'. Still, it is useful to not stop short at declaring differences between levels but to also attempt to connect them and seek more holistic understandings. Furthermore, it is also useful to not disregard the marketized dimensions of these levels of analysis. In the following we use these levels of analysis to illustrate some of the insights research has produced on the cultural role of brands.

## INDIVIDUAL

A micro perspective focusing on individual consumers relationships to brands has been a common theme in research, from the pioneering work of Fournier (1998) offering a typology



*Source:* Adapted from Desjeux, 1996; Cova and Cova, 2002.

*Figure 29.2 Levels of observation of consumption*

of 15 different consumer-brand relationships, to more recent studies addressing how consumers can harness the power of brands to reconstruct their lives (Fuschillo et al., 2022).

In this type of research, in-depth interviewing with consumers, preferably in their everyday consumption context, has been the most commonly used method, even though it has been increasingly supplemented by additional data gathering through ethnographically inspired methods both in online and IRL settings. The general goal is to provide an understanding of the roles that brands play for consumers navigating their everyday lives. The marketplace has become a source of mythic and symbolic resources through which people construct narratives of identity (Elliott and Wattanasuwan, 1998). In the view of Arnould and Thompson (2005, 871), the market produces certain kinds of consumer positions that consumers more or less voluntarily can choose to inhabit. Consequently, consumers are enacting and personalizing cultural scripts that align their identities with the structural imperatives of a consumer-driven global economy. Consequently, the task for brand researchers becomes to uncover the available cultural scripts, which requires a more macro-oriented type of methodology, as well as to elucidate how consumers behave in order to comply, or resist, those scripts, which requires a more micro type of methodology.

### **Micro-social**

To study the roles that brands play in various micro-social settings has been a thriving subject over more than two decades (Cova and Shankar, 2018). In this line of research, the tribal aspects of consumption are in focus and researchers try to grasp the linking values of certain brands (cf. Cova, 1997). Depth interviews and ethnographic work are dominant (e.g. Kates, 2004; Schouten and McAlexander, 1995), but also netnographic methods (Kozinets, 2019) have increasingly proven useful for gathering empirical data on the communal aspects of brand consumption. Examples stretch from the pioneering work of Muñiz and O'Guinn (2001) on brand communities, to more contemporary manifestations, such as brand publics (Arvidsson

and Caliandro, 2016) and anti-brand communities (Brandão and Popoli, 2022). It is typical for this kind of research to investigate and analyze the community dimensions of brands. Here, examples include uncovering the communal dimensions of mundane convenience products such as Nutella (Cova and Pace, 2006) but also luxury products (Kim and Lee, 2019).

Research on brands focusing on the individual and the micro-social has, importantly, the capacity to draw linkages between these levels and more macro-social tendencies. In their work on devotees of the now discontinued American car brand Hummer, Luedicke et al. (2010) showed how an affinity for a particular brand might stand for much more than a simple brand preference. Rather, they uncovered how various ideological beliefs about American exceptionalism were transformed into dramatic narratives of identity, where those preferring certain other car brands were seen as anti-American. These tendencies to have brands stand for larger issues is also foregrounded in Belk and Tumbat's (2005) work on brand cults where they show how devoted Apple users attributed various cultish quasi-religious aspects to their consumption, which ennobled and sacralized the 'cause' of Apple and vilified and profaned opposing brands.

### **Macro-social**

Research on the cultural roles of brands has also increasingly tackled larger issues pertaining to the macro-social level, where brands come to represent more broad-reaching issues that tend to structure society. Examples include how New Zealand brands can help craft national identity by fostering a sense of we-ness against a backdrop of globalization and resurgent indigenous identity claims (Beverland et al., 2021). A similarly far-reaching perspective on the roles of brands is taken in Cayla and Eckhardt's (2008) work on how certain Asian brands have contributed to the shaping of a transnational imagined community. Both these studies exemplify a set of studies that build on a broad and eclectic set of data from multiple sources such as interviews with consumers and marketing practitioners, ethnography, netnography, as well as pop cultural and historical materials, including advertising. Furthermore, they take into consideration the larger social, economic and political context in which brand phenomena occur. For example, political landscapes might change quite radically, as was the case with the German Democratic Republic, which triggered an array of macro-social negotiations carried out via brands and their consumption (Brunk et al., 2018). Research has also looked into how consumers can use brands to navigate other ideological and religious issues, such as Izberk-Bilgin's (2012) work on so-called 'infidel brands', where Muslim consumers in Turkey engage in a 'consumer jihad' against global brands.

There are also other types of brand-related research that address the institutional and social structures that systematically influence consumption. We know that class positions are a key element in structuring consumption and from class-based studies we know that consumers with different levels of cultural capital relate to branded goods in different ways (Holt, 1998). Another socializing structure that has increasingly been acknowledged to influence consumer culture is gender (Bristol and Fischer, 1993) and here we also see how brands are important cultural symbols. Examples include Avery's (2012) work on the resistance of brand gender-bending, looking at how consumers react to brand management decisions that run counter to the perceived view of what brands support gender identity, as well as Zayer and Neier's work (2011) on consumers' brand relationships from a gender perspective. This work illustrates the broader idea that there are many structural differences that should warn us not to

paint a picture of the cultural role of brands in overly broad strokes. An area that indeed makes this the focus of investigation is multi- or cross-cultural studies. Typically, scholars in this field look at how brands can take on radically different meanings depending on the cultural context in which they are embedded (Watson, 1997).

## RESEARCHING UNRULY BRANDS

Studies that more or less implicitly take the conceptual frameworks in Figures 29.1 and 29.2 as starting points are characterized by an *a priori* attribution of interest, designating for the researcher where the focus should be in understanding the cultural role of brands. In Figure 29.1, it is typically a matter of looking at certain entities responsible for, creating ‘brand culture’. In Figure 29.2, it is a matter of deciding upon the level of analysis. While this does not imply that everything else is ignored, it is a signal of where the primacy of interpretive power lies. For example, research on brand communities often foregrounds the cultural role of brands and their consumption in a tribal, subcultural or communal setting, thereby placing other aspects such as individual consumer identities and preferences in the relative background.

Relatively recently, a new research stream has emerged that refuses to take such an *a priori* stance on where agency should be placed to instead operate according to ideas of an ontology of ‘flattening’ (Bajde, 2013). This implies that all sorts of components at different levels of abstraction are taken into the analysis of what constitutes and influences a brand. While this type of research takes inspiration from actor-network theory and assemblage theory, it nevertheless represents original theorizing in the field of branding (Belk and Sobh, 2019), especially in ‘rethinking how ontologies of consumption, namely consumption’s subjects, objects and devices, content and contexts and materiality and socioculturality, are enacted in consumption practice and research’ (Bajde, 2013, 228). The most commonly used term for this type of research is ‘brand assemblage’ (Molander et al., 2023; Preece et al., 2019) and it has grown out of a realization that brands are far more unruly than we have hitherto believed. In this type of research all sorts of components at different levels of abstraction can have agency to shape brands.

For example, in their work on the James Bond brand assemblage, Preece et al. (2019) look at how larger cultural trends, such as a mainstreaming of (some) feminist ideas and a consequent awareness of misogyny, plays a part in the Bond brand assemblage side by side with activities of brand stewards of various kinds, from brand managers to directors. Another example is Parmentier and Fischer’s (2015) work where they studied fans of a TV series and noted how activities of fans objecting to the decisions taken by the managers of the brand contributed to the dissipation of the brand. These fans, and the doppelgänger brand images they created, are in effect seen as part of the brand assemblage. Molander et al. (2023) therefore propose a model where brand assemblages are seen as volatile entities made up of relations between various heterogeneous brand assemblage components that are constantly changing, leading to a process whereby brands are continuously reborn in a process of morphogenesis. Research taking such assemblage approaches needs to cast a wide net around the brand to capture the broad array of possible brand assemblage components. This turns data collection into an emergent endeavor where scholars continuously need to reevaluate whether they are indeed capturing the right kind of data.

Researchers are also exploring other ways in which the unruliness of brands are manifested, moving even further away from the previously dominating ideas of how firms' brand management ideas are translated into meaningful cultural entities in consumers' lives. In their work on how Champagne brands are used in online environments, Rokka and Canniford (2016) note how consumers' 'heterotopian selfie practices' bring elements into the brand assemblage that disrupt the order and thereby challenge brand design and brand management.

Yet another take on unruly brands is taken by Deka and Arvidsson (2022) who discuss brands in the so-called bazaar economy. These are brands that resemble large multinational brands both in name and design but that are sold at a fraction of the price at bazaars, markets and other places outside of the mainstream capitalist economy. On the surface it might look like they are discussing piracy, counterfeit or knockoff brands, but instead they show how these brands enable ways to mediate between popular desires and flexible production networks within an alternative, postcapitalist circle of market-based innovation that is growing in importance globally. While neither the heterotopian selfie practices nor the brands in the bazaar economy are manifestations of official brand strategies, they nevertheless contribute to the cultural role of brands in distinct ways.

Another manifestation of brands' increased unruliness is the overt critique that has been placed on brands and branding, both from the researchers or the studied contexts. Naomi Klein's (1999) modern classic *No Logo* questioned the whole notion of a branded world and raised the debate about consumers' increasing skepticism towards the domination of symbols of the market in the public sphere. From then onwards we have seen plenty of studies looking at how consumers actively try to resist the market and the domination of brands, such as Thompson and Arsel's (2004) account of how consumers resist the dominant brandscapes of global companies. This study takes a micro perspective, examining consumers directly through interviews and observation. Looking at marketplace ideologies from a critical vantage point from a macro perspective offers a different avenue for research. Instead of interviewing or observing consumers directly, this approach focuses on cultural analyses of the roles brands play in consumer culture. An example is Arvidsson's (2005) work in which he proposes that many of the outcomes of consumers' relationships to brands – such as identity, social bonds or a shared experience – can be seen as immaterial labor that the firms subsequently capitalize on, without giving due credit to the consumers themselves.

## COMMON PITFALLS FOR INQUIRIES INTO THE CULTURAL ROLES OF BRANDS

The methods used and the focus of empirical work when conducting research on brands and branding can be mapped according to Figures 29.1 and 29.2. In accordance with Figure 29.1 researchers can focus the empirical work on either i) firms, ii) consumers, iii) popular culture, or iv) other important stakeholders, or a combination of the above. Likewise, in accordance with Figure 29.2, researchers can focus on an individual, a micro-social and/or a macro-social level to study the cultural roles of brands.

A major part of research looking at brands from the perspective of firms or brand management has taken a case-study approach where one, or a few, successful companies' branding strategies are described and analyzed in detail. Here, researchers usually dissect both what is common and what is particular about the case, but the end result regularly presents something

unique. Furthermore, this uniqueness is frequently portrayed as a key to success that could, at least potentially, be copied by other companies. This move from an analytical to a normative account is potentially problematic; especially so if the normative accounts disregard the cultural particularities of the case, rendering explanations for a brand's success or failure to remain superficial. In order to achieve transferability of research findings, more sensitive interpretations of the cultural roles of the brands are necessary.

To move beyond a snapshot picture of a firm's contemporary brand management engagements, researchers have increasingly historicized the studied phenomenon by including historical data. Through analyses of archival accounts of a brand's management it is possible to achieve a more balanced understanding of what factors made the brand successful over time. Holt has suggested brand genealogy as a particular method using such historical sources and the usefulness is e.g. illustrated in his work on Jack Daniel's in America (2006) where he shows that over time, brand can play an active role in transforming emergent culture into dominant roles. When employing a historical approach, analysis of a brand's past advertising is an interesting avenue for research where suitable methods include approaches from art history (Scott, 1994), literary criticism (Stern, 1989) and visual methods more generally (Schroeder, 2002).

When studying brands' cultural roles from an individual level – focusing either on consumers' relationships to brands, or brands' role in consumer culture more broadly – it is important to keep a critical awareness. An integral part of individuals living in an advanced market economy is that they are savvy at navigating, and seeing through, the offerings by companies (Holt, 2002b). On a macro level, consumer culture and brand management strategies exist in a dialectical relationship where companies change strategies as consumers become better at decoding, and seeing through, their intentions. As researchers focusing on brands, we must be aware of this and realize that consumers constantly try to outsmart marketers. One way in which consumers might be doing this is by emphasizing or deemphasizing the importance of brands. Assuming a causal relationship between what people say they do and what they actually do is always dubious. When addressing an ideologically loaded issue like brands, it is likely that what is produced in an interview situation is merely a politically correct discourse about how that particular consumer believes one should relate to brands. Such information might indeed be highly interesting and relevant but, quite likely, has little to do with a consumer's actual behavior.

There is also a bias from many brand researchers to assume that brands are important to people. When a researcher enquires about a brand, interviewees will most likely produce accounts about brands. The more the researcher questions and probes about brands, the more consumers will speak about brands. This should not be confused with brands actually playing a significant role in consumers' lives.

Thus, methods that use naturally occurring brand-related data have gained in importance, partly to avoid inferring importance of brands in consumers' lives beforehand. An example is Arvidsson and Caliandro's (2016) work on 'brand publics' where they analyze a large dataset of Twitter posts where a particular brand is mentioned. By applying new tools for gathering online data, together with a theoretical framework that does not infer importance of brands in consumers' lives, they can offer alternative perspectives of the roles that brands play in contemporary consumer cultures.

## FUTURE BRAND RESEARCH

Brands are likely to continue to play a major role in consumer culture over the foreseeable future. While past research has sometimes been characterized by a distinction between scholars who have studied the management of brands and scholars who have studied the cultural role of brands, it is likely that the most interesting avenues forward are those that integrate various different perspectives and levels of analysis. If we acknowledge that a brand is a ruly and/or unruly cultural entity constructed by many different actors more or less actively telling their stories that create a particular brand culture (see Figure 29.1), then it is necessary to design studies into the cultural roles of brands accordingly. Here, various relational perspectives, such as the aforementioned brand assemblage perspectives, hold much potential since they are open to a wide set of components that might influence brands in a multitude of different ways. However, such broad approaches need to be complemented with fine-tuned close empirical studies looking at the specifics of the cultural roles of brands at particular times and places.

Regardless of the methods, perspectives and approaches taken to study brands and their cultural roles, those studies that exert interpretive power across and in-between various levels of analysis are likely to make substantial impact by increasing our understanding of the role of brands in our societies, because a level of analysis remains an academic simplification – it is useful as a starting point for inquiry and reflection – but it should not become a goal in itself to cater to preexisting simplifications. The brand(ed) new future has already begun.

## NOTE

1. Holt (2002a) calls this fourth group ‘Influencers’ but that term has subsequently taken on a very specific meaning and we therefore choose to call it ‘Other Important Stakeholders’.

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## 30. Qualitative research methods in services: looking back, critically within and a trajectory forward

*Anders Gustafsson and Jared Offei Lartey*

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### THE SIGNIFICANCE OF QUALITATIVE METHODS IN ADVANCING SERVICE RESEARCH

Over nearly seven decades – through the embryonic, crawling-out and legitimization phases of the services discipline (Fisk et al., 1993) – various forms of qualitative service research have played an important role in advancing academic knowledge and informing practice. Drawing on traditional methods such as interviews, field observations and secondary document analysis, as well as trending methods (such as netnography), qualitative studies have shaped our understanding of various antecedents, outcomes, processes, strategies and concepts, including service encounters, service work and emotional labor, service quality, self-service technologies, service innovation and ecosystems and the service experience (Beirão et al., 2017; Luyen et al., 2012; Pemer, 2021; Ponsignon et al., 2017). In quantitative service studies, qualitative methods have also played an instrumental role in various scale developments. Through the landscape of qualitative approaches available to the discipline, we have also been privileged with a complex, multidimensional and subjective understanding of how various phenomena and processes unfold in myriad contexts.

This chapter contains a trend analysis and critical reflection on the methodologies, methods and analytical techniques applied in all qualitative work published in what we consider key service research outlets over a 10-year period (2012–21). We have analyzed articles in the *Journal of Service Management*, the *Journal of Services Marketing* and the *Journal of Service Research*. Our results offer a commentary on good practice and a problematization of methodological issues in conducting qualitative service research, as well as insights into trends related to such areas as author collaborations, the geography of service research data, sampling, methods and analytical techniques applied over a decade. In addition, this chapter invites a reflexive, transparent and trustworthy approach to conducting qualitative service research, which in turn contributes to existing streams of qualitative research on promoting procedural and interpretative rigor (Mees-Buss et al., 2022; Harley and Cornelissen, 2022; Holmlund et al., 2020).

The chapter is organized into five sections. In the following section, we describe our methodology; after that we look back at trends and then look critically at good methodological practices and problems that have arisen over the decade. Finally, we end with some ideas on future trajectories for conducting qualitative service research.

## METHODOLOGY FOR THE EMPIRICAL WORK

We began our analysis by selecting three key service journals as data sources for a four-stage analysis. There were multiple reasons for our selection of journals, including rankings and impact. However, the goal was to find service research using state-of-the-art methodology in the best possible applications. Ironically, our observations of and results regarding methods partly challenge this conventional assumption. After selecting the journals, we traced and skimmed studies by volume and issue; extracted data into spreadsheets and research notes; and analyzed, visualized, and wrote up our findings. Figure 30.1 details the process for collecting and analyzing our data at each stage.

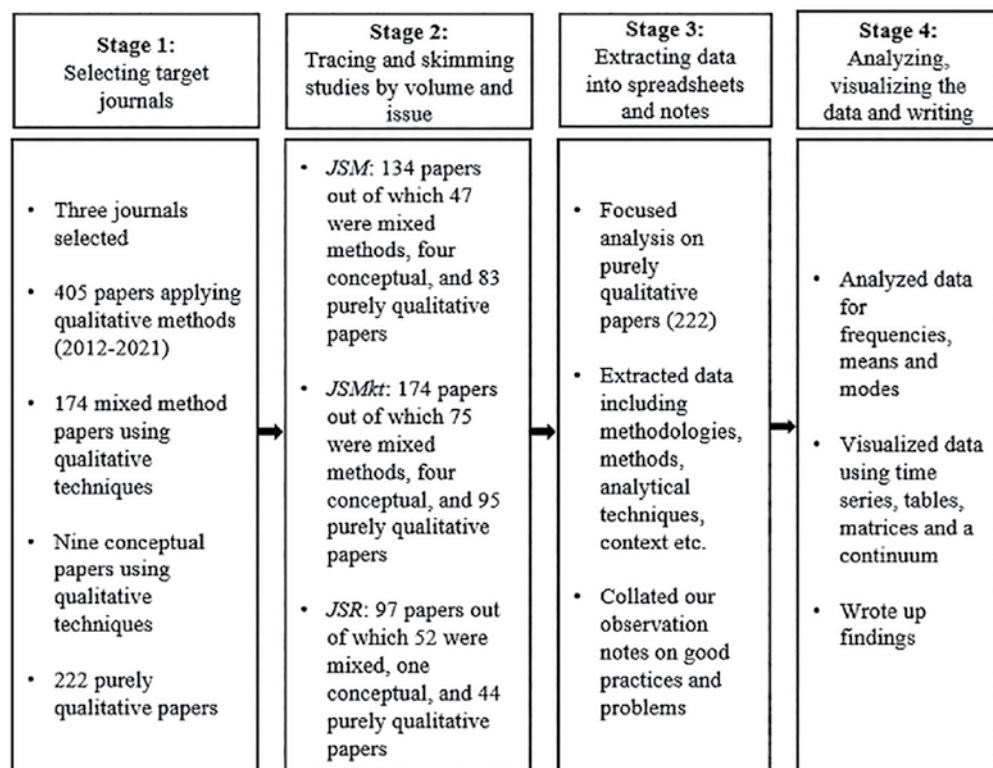


Figure 30.1 *Stages of data collection and analysis*

## LOOKING BACK: METHODOLOGICAL TRENDS OVER THE DECADE

Our analysis enabled us to develop an understanding of trends in qualitative service research over the decade. We asked the following five questions. Where does qualitative research data predominantly come from and how has it evolved? What are the trends in collaboration in qualitative service research? What are the trends in interview samples over the decade? What

are the trends in methodologies and methods applied in qualitative service research? Which analytical techniques are trending or marginalized, and why?

### **Where Does Qualitative Service Research Data Predominantly Come From and How has it Evolved?**

Further, and to extrapolate from the question above, since qualitative studies are notable for theory building, from where do our service theories evolve? We believe this is an important question because there is an ongoing need to understand the geographical biases that dominate our current service thinking and the marginalized areas that can provide inspiration for developing new service theories to advance our field.

We categorized our data geographies into eight regions: Africa, Asia, Australia/Oceania, North America, South America, the Nordic countries, Europe (excluding the Nordic countries) and the United Kingdom. The reasoning behind having subcategories within the European economic area was to see the contribution of the Nordic countries (where we are based), which have historically been a center for service management research, and which are home to some relatively notable qualitative researchers. Secondly, because the United Kingdom has withdrawn from the European Union, we were curious to understand the extent of its contribution to the continent as a whole. Table 30.1 illustrates our analysis.

Reflecting on the analysis, there was a common observation that data among the regions versus data from the three journals analyzed – especially data from the so-called Global South – is marginalized, whereas data from the so-called Global North (or the West) generally dominates. The exception was the Nordic region, which was marginalized in the *Journal of Services Marketing* – this surprised us given there are some important centers (such as CERS in Finland and CTF in Sweden) with a notable concentration of service researchers. Thus, over the decade, our source of qualitative service research data has significantly evolved from the Global North.

While the effects of globalization have been seen in many areas – including fashion, aesthetics and taste – the same is unlikely to be seen in service cultures, even within economic regions such as North America, the Nordic countries or Europe more broadly. Our current body of services literature and thinking should therefore subject to a more constructive critique than it has been before. The knowledge we have about service practices, experiences and so on relies predominantly on WEIRD data (i.e. data from western, educated, industrialized, rich and democratic populations (Henrich et al., 2010)). Perhaps we should subscribe to advocacy for contexts (Hogg and Maclaran, 2008; Steinfield et al., 2019), by strategically embracing the Global South – Africa, South America and Southeast Asia. We suggest this in pursuit of marginalized knowledge and to make current services literature holistically appealing. Further, we advocate that future qualitative research from these areas should be a high priority on journals' agendas in order to foster diversity, equality and intersectionality in service literature.

### **What are the Trends in Collaboration in Qualitative Service Research?**

The second question discussed relates to trends in collaboration in terms of the number of authors represented in qualitative service research papers, and how this has evolved over the period we observed. We reasoned this to be an important insight as collaborations are an essential part of research life. Successful collaborations increase the likelihood of carrying out

*Table 30.1 Regions of data collection for qualitative service research and their rankings<sup>1</sup>*

Regions	JoSMgt (2012–2016)		JoSMktg (2012–2016)		Ranking (2017–2021)		JoSMktg JSR by Contr. Contr.		JSR Ranking by Contr. Contr.		Region's Total Contribution to all Journals		Rank in Total Contribution
	Ranking (2017–2021)	by Contr. Contr.	Ranking (2012–2016)	by Contr. Contr.	Ranking (2012–2016)	by Contr. Contr.	Ranking (2017–2021)	by Contr. Contr.	Ranking (2017–2021)	by Contr. Contr.	Ranking (2017–2021)	by Contr. Contr.	
Europe (excluding 14 Nordics)	16	1	6	7	1	2	3	3	3	48	1		
Nordics	6	8	2	1	0	6	0	4	4	19	6		
United Kingdom	4	4	4	5	5	3	4	5	2	27	3		
Africa	0	1	7	0	5	4	0	0	5	6	7		
Asia	1	5	5	6	6	2	3	1	4	21	5		
Australia/Oceania	2	3	6	4	9	1	3	1	4	22	4		
North America	7	3	3	6	7	1	8	3	1	34	2		
South America	0	1	7	0	4	5	0	0	5	5	8		

Note: Table legend: JoSMgt = Journal of Service Management; JoSMktg = Journal of Services Marketing; JSR = Journal of Service Research; Contr. = Contribution.

ambitious research projects through well-mobilized financial, time and cognitive resources. Our analysis is illustrated in Figure 30.2.

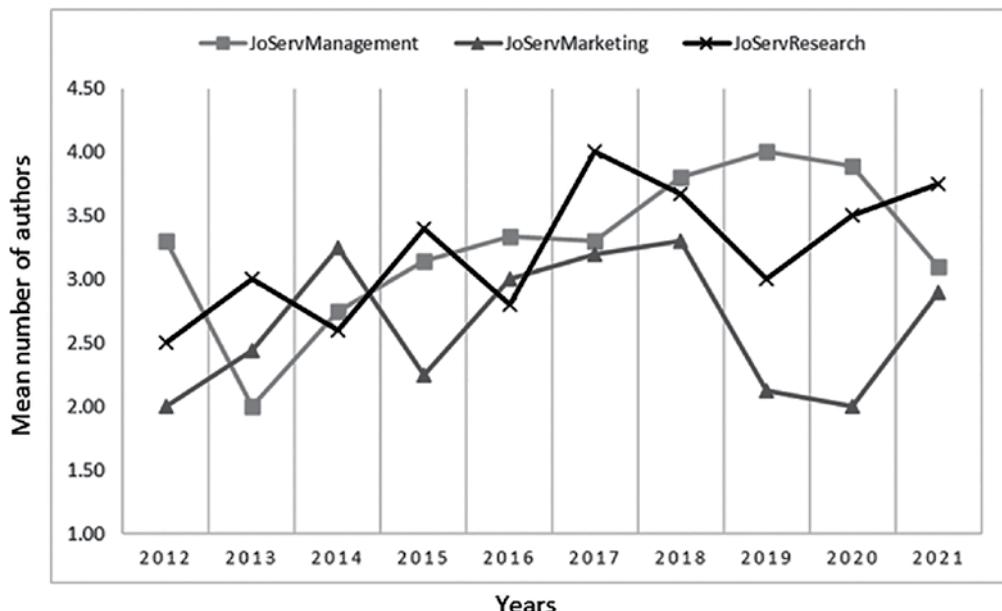


Figure 30.2 Trend analysis of mean number of authors<sup>2</sup>

Our assumption prior to the analysis was that the number of collaborations observed within the period would show a generally increasing trend. Overall, the number of authors per paper spanned one to seven. Our analysis across the 10-year period revealed that the *Journal of Service Management* had the highest mean number of authors (3.26), followed by the *Journal of Service Research* (3.22), and then the *Journal of Services Marketing* (2.65), whose result was significantly lower relative to the other two journals.

However, this took an interesting turn when we considered the journals in terms of their output of purely qualitative studies. The *Journal of Services Marketing* had the highest output (95 out of a total of 222 purely qualitative papers within the period), the *Journal of Service Management* sat in the middle (83), and the *Journal of Service Research* had the lowest figure (44). However, although the *Journal of Service Research* published fewer purely qualitative papers for the period, those papers, on average, had a greater number of collaborations.

In our time series (based on mean number of authors per year) illustrated in Figure 30.2, we found that collaborations in the *Journal of Service Management* generally increased from 2013 after their lowest peak during the same year. The mean number of authors (3.26) shows that the journal had on average three authors collaborating on purely qualitative studies. However, we also found that the collaboration trend went into recession in the later years of our observation, from 2019, and there was a sharper recession in the number of people collaborating from 2020. The trend of recession in these later years was also observed for the other two journals. We believe that possible reasons for this may include the challenges to research collaboration

presented by the pandemic. All the same, the analysis for this journal revealed the most linear trend relative to other journals observed.

Our analysis of the number of authors per paper for the *Journal of Services Marketing* over the period shows a relatively stable increase in collaborations after a recession from 2014 and another recession within the later period of 2019 through to 2021. The mean number of authors for the period in this journal (2.65), however, is an average of two or more authors collaborating on purely qualitative studies.

Our analysis of the *Journal of Service Research* revealed the rockiest trend, with a mean number of collaborations (3.22) showing an average of three or more authors collaborating on purely qualitative studies for the period. Our analysis across the period shows a brief, steady increase in the number of authors from 2012 to 2021, after which there is a steady recession until 2015 and, again, a general expansion until 2019, where it evolves into a recession, similar to the other two journals.

In conclusion, we find that the three journals collectively had on average three authors collaborating on published studies. When we consider their means, the trend in collaborations across the journals can also be said to be relatively close irrespective of steady peaks, recessions and wide dispersions during the last three years of our observation. Our analysis pointed to the potential for increased collaborations in the *Journal of Service Research* and the *Journal of Services Marketing*, and a potential downward trend in the *Journal of Service Management*. In light of this, we conducted a three-year forecast using Microsoft Excel based on data from the 10-year period. The results predict an average of four authors in the *Journal of Service Research* and the *Journal of Service Management*, but an average of three authors on future collaborations in the *Journal of Services Marketing*.

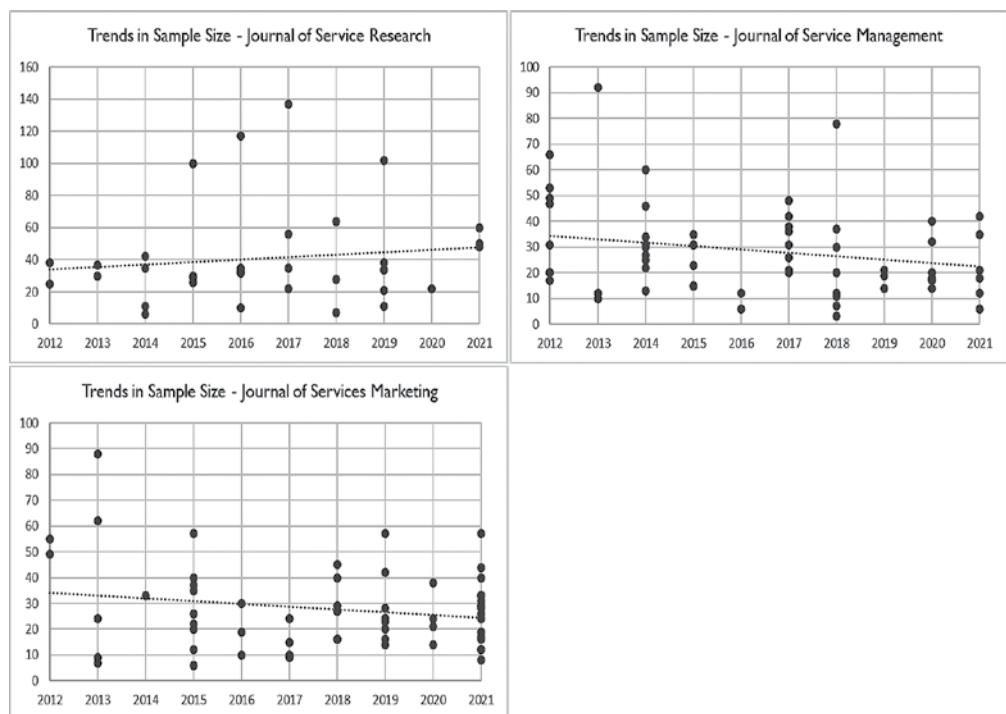
### What are the Trends in Interview Samples over the Decade?

Interviews of various types – in-depth, focused or laddering – have been employed as methods for data collection in qualitative service research. Given the increasing advocacy for procedural and interpretative rigor in qualitative studies (Mees-Buss et al., 2022), the process for faithfully gathering the empirical material for analysis has been under intense scrutiny. While the general epistemology for qualitative research favors quality over quantity, it appears common, in practice, to justify sample sizes by the purpose of the study, similar qualitative studies, or, even more commonly, by claiming to have attained theoretical saturation in the data (Randle and Nadia Zainuddin, 2022; Kelleher et al., 2019).

Later, we will look at problematizing the templating of theoretical saturation in many of the studies we observed. Here, we discuss what can be considered an empirical reference for trends in sample sizes for qualitative service research over the recent decade. Figure 30.3 illustrates our analysis; there is an accompanying chapter endnote.<sup>3</sup>

Our prior assumption before the analysis was that the trend in sample sizes for interviews would be incremental and positive. This reasoning was based on increasing advocacy for data quality through extensive engagement with context, and the common requirement to demonstrate that one had done rigorous work in exhausting opportunities to challenge various assumptions in the data by transitioning into a higher echelon of data saturation – theoretically possible through using larger samples.

Surprisingly, this assumption is contested by our data, with the exception of the *Journal of Service Research*, where we find a positive trend in the interview samples used. We believe



*Figure 30.3 Trends in sample sizes*

factors contributing to the generally negative trend may include the declining use of interviews as a primary method in favor of method triangulation (in the journals we observed). Or perhaps, this generally negative trend speaks directly to the fact that interview sample sizes have seen a decline over the years. We also noted at least eight different sampling techniques referenced in qualitative service research, including theoretical sampling, snowballing, convenience sampling, random selection, sampling by volunteering, judgement sampling, criterion-based sampling and purposive sampling.

Out of 59 qualified studies in the *Journal of Service Management* we found the highest sample size at 92 participants and the lowest at three; the mean sample size was approximately 28, and the modal sample size was 20 participants. Nonetheless, the general trend in sample size was negative. This is also surprising given that there were more studies conducted in the last five years of the observed period than in the first five years. We considered various reasons for this decline; for example, we assumed that studies conducted in the last three years of the 10-year period must have been influenced by challenges in conducting interviews due to the pandemic. However, we also did not observe any significant expansion in sample size in the year just prior to the pandemic. Additionally, there was the possibility that most of these studies could have been in the process of data collection and peer review years before the pandemic period, and were therefore not necessarily affected by the pandemic.

In the *Journal of Services Marketing* we had 62 qualified studies. Among these, the highest sample size was 88 participants and the lowest six; the mean sample size was approximately 28 and the modal sample size was 24 participants. Similar to the *Journal of Service Management*,

the trend here is also negative, irrespective of the fact that more studies were conducted in the last five years of our observation period than in the first five years.

In the *Journal of Service Research*, we observed 34 qualified studies. We found that the highest sample size was 137 participants and the lowest was six. The mean sample size here was higher than that of the previously observed journals, at approximately 41 participants, and the modal sample size was 35. For this journal we observed a positive trend, though of the three journals it had the least qualified number of studies. Moreover, compared to the others, this journal had a much more stable distribution of studies between the first and last five years, making it ideal for our analysis.

After this, we were tempted to correlate these trends with journal rankings using the ABS *Academic Journal Guide* for 2021. The *Journal of Service Research* was ranked at level 4 over three consistent periods (2021, 2018, 2015). Both the *Journal of Services Marketing* and the *Journal of Service Management* were ranked at level 2 over the same three consistent periods (2021, 2018, 2015), but differed in, for example, a journal citation report rank of 16 and 7, respectively, in 2021. Our results confirmed a correlation between the journal rankings and trends in interview sample sizes, and showed that the higher the journal was ranked, the more positive the trend for interview sample size.

### **What are the Trends in Methodologies and Methods Applied in Qualitative Service Research?**

Moving away from collaborations, geographies of data and sampling, we now turn to trends in methodologies and methods adopted in the qualitative service studies we analyzed within the 10-year period. We reasoned that such an overview of methodologies versus methods is important to understand their latest applications as well as to question why some get widely adopted or marginalized, and to point readers to potential avenues for methodological innovation. In fact, we were less impressed by the many studies that did not explicitly present their methodologies or poorly described their methods for gathering empirical material. For this reason, the trends discussed here are an important reminder about the landscape of methodologies and methods available to us in terms of pushing the boundaries of service research.

We began by visualizing 14 identified methodologies by 23 different methods of data collection into a matrix, sourced from a total of 222 purely qualitative studies (a simplified version is presented as a continuum in Figure 30.4). Based on the matrix, we found the top six adopted methodologies in qualitative service research were case studies (89 studies); interview studies (36), which we will attempt to problematize for their popular consideration as a methodology later; grounded theory (22); ethnography (18); phenomenology (17); and, finally, netnography (15 studies).

The result that case studies were the most adopted methodology was unexpected. Our theories for this are that perhaps case studies are enticing due to their established research procedures, or, rather, most of the qualitative service studies had taken an organizational perspective. We were also intrigued to observe the prominence of netnography among methodologies we otherwise consider traditional for conducting qualitative research. We think that this trend positively highlights the enthusiasm of service scholars for leveraging the large volume of rich, unstructured, unobstructed, real-time data offered by social media, online communities and the internet in general.

However, beyond these popular methodologies we discovered marginalized methodologies such as critical incident technique (nine studies), which has been confusingly represented as both method and methodology. This was followed by hermeneutics (seven), document studies (five), action research (three), discourse studies (one) and the theories-in-use approach (one study). We think that the marginalization of hermeneutics in qualitative service research is surprising. We would have expected that this would trend in the top six methodologies we found, given the rising calls for interpretative rigor in qualitative studies through applying principles in hermeneutics (Mees-Buss et al., 2022). Looking at these marginalized methodologies, we equally think that critical incident technique and the theories-in-use approach described by Zeithaml et al. (2020) have huge potential for understanding favorable and unfavorable service experiences, and drawing out subconscious managerial decisions and actions, respectively. Similar to our theories about why prominent methodologies have been applied, we think that these marginalized methodologies are perhaps perceived as being less established epistemological practices among service researchers.

On this note, we will now delve into trends we found in some 23 methods of data collection over our observation period. Of the 222 purely qualitative studies analyzed, we found seven prominent methods of data collection in qualitative service research. Interviews were, collectively, the most prominent, appearing in at least eight different formats, though some of these were marginalized. However, considered separately, semi-structured, in-depth interviews were the most prominent (172 studies); followed by field observations and visits (66); secondary methods of data collection such as reports, archival data, and photographs (57); focus groups (24); web scraping from social media, online reviews, online forums etc. (23); data collection through workshops and meetings (12); and diaries (10 studies).

The presence of interviews and observations is not surprising, as these have traditionally been common methods in qualitative research. We also think the rise in data scraping from the internet is supported by the rise of netnography as a methodology. In many studies where this was not the primary method for data collection, we found that such netnographic methods were used as complementary data sources and to gain contextual knowledge. Moreover, while diaries are relatively prominent in the analysis, they only feature in 10 of the 222 qualitative studies we observed. We think diaries have further potential, especially in producing rich, reflective, longitudinal data on service customers and frontline employee experiences, emotions, consumption practices and wellbeing – from everyday service interactions to people's normal contexts (e.g. home environment).

We also found some 16 marginalized methods of data collection, eight of which we feel are significant given the limits of this chapter. These included qualitative surveys and forms (seven studies), visual methods/mapping activities (four), text mining (four), *in situ* conversations (three), online interviews (two), the Zaltman metaphor elicitation technique (two), shadowing (one) and videography (one study). The fact that these methods were marginalized is alarming given their potential. For instance, while interviews are generally a top trend, the number of reported online interviews is very scant. We suspect some studies might have reported online interviews as part of their in-depth interviews, neglecting it as a different interview format with unique affordances and limitations. We also expected to see more of this within the last three periods of our observation due to the pandemic. However, this expectation was not met, irrespective of 78 purely qualitative studies being observed in the three-year period.

Though serendipity is said to play a prominent role in many scientific discoveries (Hannan, 2006), the potential of spontaneous or *in situ* conversations is marginalized in service research.

In post-pandemic life, we also think shadowing and videography could be better utilized for rich descriptions. Shadowing, though marginalized, can be valuable for understanding processes such as customer journeys in retail and healthcare and hospitality services, as well as the routine activities of managers and frontline service employees. We are also lacking the benefits of projective techniques for understanding how hidden motives shape customer–employee service interactions.

Looking at trends regarding which methods have largely been used in particular methodological approaches, we found that case studies mainly rely on in-depth interviews, observations and secondary documents. Ethnographic studies have commonly used observations along with interviews and surprisingly few participant diaries. Grounded theory approaches have relied heavily on in-depth interviews. Netnographies have mainly reported on scraped data from social media posts and forums and less from observational data in online communities. Also, we found that phenomenology has largely relied on interviews but could take more advantage of participant diaries. Figure 30.4 illustrates our analysis of trends in methodologies versus methods.<sup>4</sup>

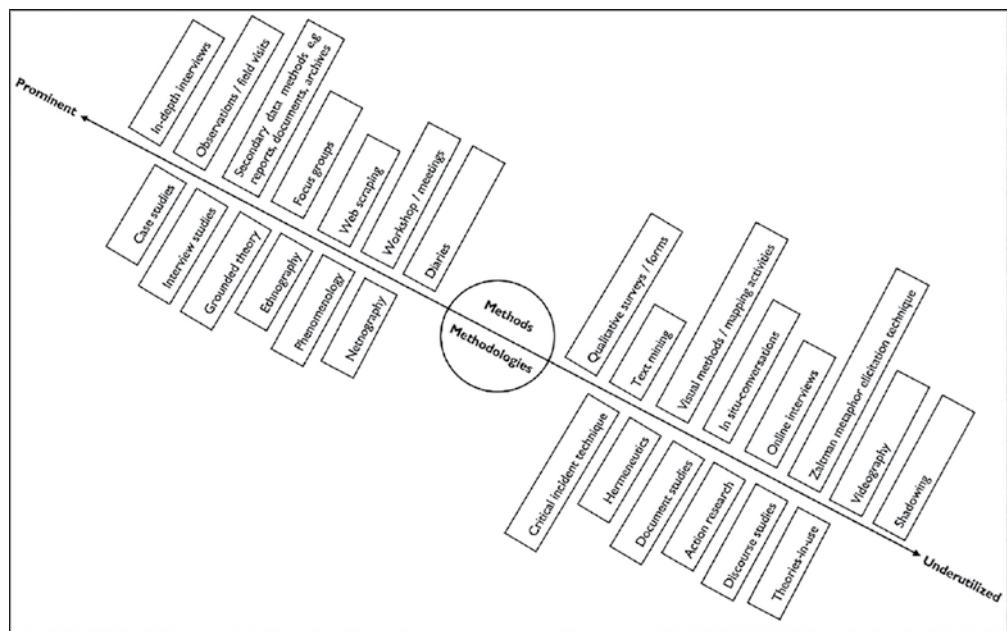


Figure 30.4     *Methodology versus methods continuum*

### **Which Analytical Techniques are Trending or Marginalized, and Why?**

The final trend we will present relates to the variety and frequency of analytical techniques that have been applied. Since we observed the tendency of authors to place less emphasis on what specific analytical techniques were applied to the data, we think it is useful to draw attention to the forms of analysis that can and have been applied over the years. We will examine why some forms of analysis are prominent and others marginalized. Our findings (the short version

is in Table 30.2) also offer some insights for evaluating which journals are methodologically innovative and which journals understand which type of analysis, so that readers may be informed when deciding where to submit their work.

*Table 30.2 Frequency of selected analytical techniques applied*

Analytical Techniques Applied	JoSMgt (f)	JoSMktg (f)	JSR (f)	Total (Σf)
Within and cross case analysis	14	5	3	22
Thematic analysis	25	42	18	85
Constant/systematic comparison technique	11	7	7	25
Content analysis	13	11	1	25
Pattern analysis	7	2	2	11
Text mining/text analysis	3	4	1	8
Sentiment analysis	1	1	-	2
Grounded theory analysis	1	1	-	2
Ethnographic schema elicitation (ESET)	1	-	-	1
Hermeneutic interpretations	2	3	1	6
Critical discourse analysis	-	1	-	1
Qualitative comparative analysis (QCA/fsQCA)	-	-	2	2

*Note:* Table legend: JoSMgt = Journal of Service Management; JoSMktg = Journal of Services Marketing; JSR = Journal of Service Research.

Our results yielded 30 analytical techniques described over the 10 years across the three service journals (presented in short form in Table 30.2). The most prominent analytical techniques we found were, in order, thematic analysis; constant or systematic comparisons; content analysis, which was sometimes presented as thematic content analysis or conversational word count; within and cross case analysis; pattern analysis; what authors described as text analysis or text mining; and hermeneutic interpretation or an interpretivist hermeneutic circle. At the risk of preempting the content of the section on methodological problems, we must confess our disappointment with some studies, which described analysis by simply saying they followed Miles and Huberman's (1994), Holt's (1995) or Spiggle's (1994) approaches. This does not seem entirely convincing for an epistemological approach obsessed with fine details. We also think prominent analytical techniques such as thematic, cross and within case analysis, and comparison were sometimes used in a context that appeared to be a way to pacify nosy reviewers who might otherwise critique their rigor. Or techniques such as within and cross analysis were perhaps popular due to their higher prevalence in case studies.

Like methods, some analytical techniques – such as fussy set qualitative comparative analysis – were marginalized, even though multiple cases were prevalent. The same went for critical discourse analysis, sentiment analysis, ethnographic schema elicitation and grounded theory analysis, even though grounded theory is cited among popular methodologies, and ethnographic schema elicitation. We were also surprised to find that t-tests and chi-squared tests were borrowed from quantitative domains and used in qualitative analysis, for example of diaries (Elg et al., 2012).

We now take a brief look into the three journals versus analytical techniques. We found the top four analytical techniques across the journals to be thematic analysis (85 studies), constant

comparison technique (25 studies), content analysis (25 studies), and within and cross case analysis (22 studies). Altogether, the frequency of thematic analysis was surprisingly larger than the other top three forms of analysis combined. We asked ourselves: has qualitative service research been concentrated on the production of themes? While some experts will argue no, our data says otherwise.

Among the three journals, we also found that the *Journal of Service Management* had the most analytically diverse qualitative papers, followed by the *Journal of Services Marketing* and then the *Journal of Service Research*. While all three journals featured highly promoted thematic analysis, we found that their enthusiasm for other methods was dynamic. For instance, the *Journal of Service Management* published more papers using within and cross case analysis (14) compared to the *Journal of Services Marketing* and the *Journal of Service Research* (five and three, respectively). There was a similar trend in the journals looking at studies using the comparison technique. However, the *Journal of Service Research* appeared less enthusiastic about content analysis, with only one paper published within the 10-year frame, compared to 13 and 11 in the *Journal of Service Management* and the *Journal of Services Marketing*, respectively.

All three journals were less enthused about pattern analysis, with seven papers in the *Journal of Service Management*, two in the *Journal of Services Marketing*, and two in the *Journal of Service Research*. The same can be said for grounded theory analysis, which was only represented in one paper in each of the *Journal of Service Management* and the *Journal of Services Marketing*. We do not want to conclude that the *Journal of Service Research* does not prefer this type of analysis, as we found a case where it was also the only journal among the three publishing two papers using qualitative comparative analysis or fuzzy set qualitative comparative analysis (fsQCA). Analysis drawing on hermeneutics was also unpopular among the three journals, with the *Journal of Service Research* publishing only one and the *Journal of Service Management* and the *Journal of Services Marketing* publishing two and three papers, respectively, across the entire 10-year period. Again, we are not tempted to conclude that the journals found the hermeneutic process of questioning and grappling with participant data to then reinterpret it within context problematic.

Discourse analysis was only featured once among the journals, in the *Journal of Services Marketing*. Regardless of the abundance of online reviews and data from social media interactions that can help to understand consumer emotions, sentiment analysis featured once in each of the *Journal of Service Management* and the *Journal of Service Research*. Text analysis or text mining only appeared four times in the *Journal of Services Marketing*, three times in the *Journal of Service Management* and once in the *Journal of Service Research*. This is the point where we close the curtain on looking back at analytical trends. However, as before, we recognize that our analysis is limited to what authors had indicated or not indicated in their studies, and we have strived to directly present what authors had described as their analytical techniques.

## LOOKING WITHIN: SOME GOOD METHODOLOGICAL PRACTICES

After highlighting trends through looking back, we will now turn within to acknowledge good methodological practices we observed across the three journals. Generally, we were inspired

by studies that approached research methodology as the craft of making convincing arguments and science by demonstrating systematic procedures. We would like to keep things concise by identifying four practices.

### **Practices of Triangulation**

The ability to triangulate researchers, theories and appropriate analytical techniques to understand service phenomena and processes is invaluable. Across the three journals, we observed practices of triangulating multiple data sources in demonstration of rigorous empirical material. For example, some studies drew on netnographic data to familiarize themselves with the context, while relying primarily on interviews, observations or the analysis of secondary reports and documents (such as Sharma and Conduit, 2016; Parasuraman et al., 2021). We hope to see triangulation habitually extended to theoretical frameworks and analytical techniques, as many service studies we observed were limited to only describing techniques applied to primary methods, at the expense of others. Moreover, as a good practice, triangulation can signal procedural rigor (Flick, 2018) and show that researcher(s) have done a good job in exhausting the data ecosystem, as well considering possible theoretical frameworks and analytical tools to situate the proposed findings.

### **Quantification of Empirical Material for Qualitative Analysis**

Aside from triangulation, we observed efforts to quantify the volume and variety of data collected for qualitative analysis. Conventionally, such quantification has only been done on total cases investigated, number of interview participants, or total focus groups conducted. However, some studies put in the effort to indicate how many pages of interview transcripts were analyzed, the number of participants constituting each focus group, the number of report pages analyzed, the number of posts and comments scraped, hours of observation, and the number of sites and the volume of observational notes, rather than just broadly counting them. This type of information helps a reader to understand the effort that has gone into collecting a holistic perspective on a phenomenon and strengthens the validity of the findings. For example, in their study on service robots in elderly care, Čaić et al. (2018) quantify their empirical material for a thematic analysis, which constituted 20 elderly persons and 326 single-spaced pages of text. We reason that such practices establish for readers and reviewers the magnitude of the empirical material from which findings come.

### **Systematic Descriptions of the Analytical Process for Both Primary and Complementary Methods**

Especially in studies that used method triangulation, it was common to find that analytical procedures were only described for the main method and generalized for the remainder. We think that two pitfalls of this are that it suggests to reviewers and readers that complementary methods did not play a serious role in informing the study, and that author(s) must have flattered reviewers with signals. We feel that all methods should be described to ensure that another researcher could understand and replicate the procedures. Some studies did make the effort to describe the stages of constructing the empirical material, and the specific analysis that was applied to different methods and why. For example, in their work on experience

co-creation, Schallehn et al. (2019) unfold their method across five stages: source of material, selection of material, description of material, category selection, evaluation of material and rigor in the research process, after which they illustrate their application of a content analysis in four connected phases.

### **Demonstrating Contextual Proficiency**

As qualitative service researchers we are privileged, through access to and insights from contextualized data. However, pointing to the context in some studies was not always easy, or in some cases a brief description of the context was added to the method section. We therefore appreciated studies that demonstrated some level of contextual proficiency to readers (such as Wunderlich et al., 2013; Griffiths and Gilly, 2012). It was common to observe in case studies an attempt to describe the characteristics of the organization. However, we also found it interesting that in outside case studies, such as netnography and phenomenological research, there was an attempt to immerse readers in the nature of the activities studied, whether it was service work by frontline employees in luxury hotels or nursing homes, or cosmetic surgical services. This allowed readers to absorb the findings in a clear context.

## **LOOKING CRITICALLY WITHIN: COMMON PROBLEMS AND A CRITIQUE**

### **Problems with Delineating Methods Versus Methodologies**

As we looked critically into the method sections of the 222 purely qualitative studies across the three journals, we had expectations of easily extracting applied methodologies versus methods. However, this turned into a daunting task across some papers. First, we found a problematic practice where authors vaguely indicated the study's methodology as qualitative research without an effort to specify if this was a phenomenological study, ethnography, a grounded theory approach or something else. In contrast, given the landscape of methodologies available to qualitative researchers, we believe there is perhaps no methodology that can just be described as qualitative research. It was therefore no surprise to find that these studies often compromised on highlighting the epistemological and ontological assumptions inspiring their process of collecting and analyzing the empirical material.

We then encountered an even bigger problem: confusion as to whether some methods of data collection were truly methods rather than methodologies. As an example, it was common to find that critical incident techniques and discourse analysis were portrayed as both methods and methodologies in different studies. However, given that methodologies imply philosophical, practical assumptions, and given methods for data collection and analysis (Viergever, 2019), the current confusion between methods of data collection and methodologies is unfortunate.

### **Problematic Templating Practices in Method Sections**

Aside from the methodology versus method confusion, an overview of how methods sections unfolded across the three journals suggests a growing practice of templating in contrast with

creating uniquely crafted method sections. One templating practice observed was that many method sections were organized by the sampling process (for instance, indicating purposive sampling and the sample size), data collection methods (for instance, indicating use of interviews and observations) and analysis (which was sometimes missing information about the specific techniques applied, the analytical stages or the number of themes produced). As a result, many method sections did not show the creative, messy process of conducting qualitative research and may not have reflected true events.

Another templating practice we struggled with was reference to theoretical saturation during data collection for interviews. We wonder if such thing occurs as frequently as cited, keeping in mind that interviews conducted reflexively incrementally offer new insights. To sum this up, the possibility that a paper's method section could literally be taken and used in other studies with little adaptive effort should be deemed problematic, though we recognize that authors often fall prey to implicit expectations from journals to mimic the formats of the best papers.

### **The One for All Problem: Poor Descriptions of Analytical Techniques for Multiple Data**

After our analysis of the qualitative papers, we had divided perspectives about triangulation and the rigor of analytical techniques: on the one hand it seemed good practice and on the other it appeared that some studies failed to show a convincing analysis of the multiple data gathered. It was common to observe authors claim they applied one type of analysis, such as a thematic or within and cross case analysis, to different data types, without clearly delineating how this process played out for each, how many themes were predetermined or emerged during each analysis and how these insights contrasted or wove together. We think such practices debase the principles of transparency and trustworthiness.

Moreover, on the matter of poor analysis, we were astonished by authors who stated that data collected were analyzed using NVivo and who provided little or no detail about the coding process or logic for arriving at abstraction. Other studies we deemed poorly analyzed that did not use NVivo claimed that their analysis followed suggestions by influential authors such as Yin (2005), Spiggle (1994), Holt (1995), or Miles and Hubberma (1994), among others, assuming that these references, given their influence, were so familiar to potential readers that their own studies could forfeit the need to detail specific stages or analytical processes. This practice, we think, is problematic.

### **The Interview Dilemma: Should We Have Such a Methodology Classified as an Interview Study?**

We are now closing our problematization of the papers we analyzed. However, in closing we need to question the many studies that have passed reviewers' desks claiming the study methodology used was an interview study. We wonder if there should be such a methodology, and what its specified philosophical and practical assumptions, methods and established approaches to analysis should be. Our questioning of this so-called methodology is supported by our reasoning that interviews or so-called interview studies have long been methods of data collection frequently specified within established methodologies such as ethnography, case studies, phenomenology, grounded theory approaches and similar, such as theories-in-use.

For instance, doing a study based on observations does not make observation a methodology, and we think this is same for interviews. Perhaps the philosophical and practical assumptions and analysis of the observations followed established practices in, say, ethnography or phenomenology, when the engineering behind interviews was to investigate lived experiences. However, given that this is so frequently used, it seems somewhat odd and deserves a conversation.

## LOOKING FORWARD: IDEAS ON FUTURE TRAJECTORIES FOR CONDUCTING QUALITATIVE SERVICE RESEARCH

So far, we have looked at methodological trends, practices, and problems. We will now end the chapter with some ideas for conducting qualitative service research in the future, to strengthen already valuable efforts channeled into the existing body of literature.

Qualitative research is visibly marginalized in the service journals we analyzed relative to quantitative approaches. But, to be clear, we believe it is a legitimate and very important approach. In fact, most of what we observe today as valuable data for understanding service customers, employees and organizations is not quantified. Rather, it exists in the form of subjective meanings, expressed emotions and things said and done across various contexts. Therefore, we think that qualitative research done right (e.g. up to the normal standard expected from up-to-date research) is advantageous for understanding, explaining and improving our knowledge about services in the physical and digital world, including the metaverse.

What we do wish to see, however, in methodological developments, is the demonstration of rigorous, transparent and trustworthy descriptions of our messy, reflexive, creative and iterative analytical processes wrapped in contexts and fine details. Also, we wish to see well-defined methodological approaches and techniques for collecting and analyzing data. In addition to using frequently thematized qualitative data, we hope that service researchers will reflexively question and challenge their data to produce critical findings and contextualized insights for informing both academia and practice. These aspirations, when collectively put into action, can promote validation for qualitative service research and allow interested others to reproduce our findings and processes born from demanding but stimulating desk and field work.

Moreover, we hope that readers, in their ongoing and future studies, will adopt critical approaches to writing method sections by problematizing existing methods and analytical techniques in their research beyond templating. Going forward, we hope that qualitative service researchers will show more enthusiasm about collecting ‘crazy data’ by extensively defining the boundaries of their data ecosystems for addressing research questions and reflecting on the extent to which it is possible to exhaust data opportunities within the ecosystem.

For increased analytical rigor and well-grounded interpretations, we propose the possibility of applying multiple suitable analytical techniques to exhaust insights from collected qualitative data. Finally, we dedicate our last words in this chapter to advocating for readers to consider inspirations for theories on service practices and experiences from the marginalized Global South, as seen in our analysis. To strengthen the influence of the services discipline, we must be more diverse, inclusive and interdisciplinary.

## NOTES

1. We recognize some limitations in this analysis. For instance, studies marked with global data, such as that from online forums and social media, were excluded from the distribution to avoid misrepresentation in our analysis. When a paper had data collected from more than one of the eight predetermined regions, all regions were separately credited with the data. Studies with data from Turkey are classified under Asia, for the simple reason that its geography extends more into Asia than Europe. When a paper stated the region of data collection as Europe without specifying which country, the paper was counted in the section labelled Europe (excluding the Nordic countries). The analysis also excludes some 65 studies across the three journals that did not state the region of data collection. This is one of the problems we will attend to later in this chapter, though we acknowledge that under certain circumstances, some case studies anonymized the organization and country of data collection to adhere to ethical principles and nondisclosure agreements. However, we believe these limitations, transparently put forward, do not significantly influence the relevance of our output, especially from an overview perspective.
2. We would like to acknowledge the limitation that we measure collaborations by number of authors registered per paper rather than by author collaborations across national identities, countries or regional institutions. These excluded metrics are interesting, but not without problems relating to dual nationality and institutional affiliations. Yet, for curiosity and to make a case for understanding diversity in collaborations, we suggest looking into these metrics for future studies.
3. We acknowledge a few limitations. First, we only included studies that had stated their interview sample sizes. For some interview-based studies, either no sample size was indicated, or it was stated that the sample was carefully selected. We also recognize that some studies included are not solely based on interviews and may have thoughtfully compromised on larger interview participants for participants in complementary or primary qualitative methods used. Moreover, we did not consider the sample sizes for focus groups as we had some cases where authors stated the number of focus groups conducted without details of how many participants were involved.
4. We acknowledge limitations in developing the matrix used for our analysis, such as inadequate statements on methodologies adopted, misrepresentation of methods as methodologies and vice versa, unspecified cases of methodological bricolage, and the limitations of our analysis in terms of the methods and methodologies we were able to discern in the gathered studies.

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# 31. Artificial intelligence and qualitative research

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## INTRODUCTION

Artificial intelligence (AI) has captured the attention of marketing practitioners and scholars. A recent study by McKinsey reveals that half the firms surveyed are adopting AI to enhance a variety of functions, including market segmentation, customer acquisition and product development (McKinsey, 2022). According to Davenport and Mittal (2022, n.p.), new tools such as generative AI are ‘valuable across a number of business functions, but marketing applications are perhaps the most common’. Likewise, AI has attracted considerable interest from marketing scholars across a broad array of domains, including consumer behavior (e.g. Longoni et al., 2019), marketing strategy (e.g. Luo et al., 2019) and mathematical modeling (e.g. Cui and Curry, 2005). As recently noted by Castelo et al. (2019), AI ‘algorithms offer enormous potential for improving outcomes for consumers and firms, including the automation of a large proportion of marketing decisions’ (809).

According to Huang and Rust (2018, 155), AI can be defined as ‘machines that exhibit aspects of human intelligence’. These intelligent machines are able to meet or exceed human capabilities across numerous functions, including analyzing data, providing advice and creating art and music (Castelo et al., 2019; Humphreys and Wang, 2018; Longoni et al., 2019). Until now, these functions have been mainly performed by humans. Thus, AI represents a revolutionary change in the way marketing is performed. In recognition of this revolution, marketing academics have begun to ask important questions such as how humans respond to AI and the ethical implications of this new technology (e.g. Kopalle et al., 2022; Puntoni et al., 2021). Thus far, answers to these queries have been mainly derived from either conceptual logic (Davenport et al., 2020), experimental manipulations (Castelo et al., 2019) or secondary data (Wang et al., 2023). Thus, an important question is: What can qualitative research inquiry contribute to this discussion?

In this chapter, we seek to answer this question. Due to its emerging and inductive nature, qualitative inquiry is typically more open-ended by design and capable of offering rich and nuanced insights (Graebner et al., 2012). Hence, qualitative inquiry is viewed as ideal for understanding new and emergent phenomena and developing (versus testing) theory (Diamond et al., 2009). These qualities seem ideally suited for understanding nascent technologies such as AI.

Our goals in this chapter are threefold. First, we provide an overview of the state of qualitative marketing scholarship about AI. We review 10 AI marketing articles that use qualitative research techniques and categorize them based on their subject and topic. We believe this review and categorization will help qualitative marketing scholars understand the types of questions being asked in this domain. Second, we illustrate how ChatGPT can both generate questions for qualitative inquiry and also answer these questions. Third, we provide future research questions that lie at the intersection of marketing and AI.

## QUALITATIVE MARKETING SCHOLARSHIP IN THE AI DOMAIN

To assess the state of qualitative AI marketing scholarship, we used Google Scholar to search for articles on this topic published since 2012. We used a variety of search terms, including ‘qualitative methods’, ‘depth interviews’, ‘ethnography’ and ‘focus groups’. We also examined the table of contents of several leading journals (e.g. *Journal of Marketing*, *Journal of Consumer Research*, *Journal of Academy of Marketing Science*) since 2012. Our search uncovered 10 articles that matched our criteria (see Table 31.1). As shown in this table, these studies are split almost evenly between focusing on consumers vs. firms and the most commonly studied form of AI technology is voice assistants. Also, half focus on the antecedents of AI adoption, while the other half focus on the consequences of AI adoption. Figure 31.1 organizes these articles according to two dimensions: Subject (i.e. Consumer vs. Firm) vs. Topic (i.e. Antecedents of Adoption vs. Consequences of Adoption). Below, we provide a brief overview this research.

### Antecedents of AI Adoption

Our review reveals that the antecedents of AI adoption is a topic of considerable interest in qualitative studies of both consumers and firms (Bonetti et al., 2022; Karimova and Goby, 2021; Mogaji and Nguyen, 2022; Pitardi and Marriott, 2021; Volkmar et al., 2022). This body of research suggests that the adoption of AI-based technologies is largely constrained by concerns about privacy protection. To overcome these concerns, trust is often invoked as a possible solution. Trust appears to be especially important for the adoption of AI-powered voice assistants, due to the ability of these tools to record and transmit information that is private and personal in nature (Karimova and Goby, 2021; Pitardi and Marriott, 2021). Some studies suggest AI is more likely to be trusted if it is anthropomorphic in form. For example, Pitardi and Marriott (2021) found that anthropomorphic forms of AI are more likely to be viewed as having a higher degree of sociability, which helps develop trust in voice assistants. Likewise, Karimova and Goby (2021) found trust in voice assistants is more likely if these tools employ anthropomorphic strategies (e.g. giving the assistant a human name).

Prior qualitative studies in this domain also find that the adoption of AI is facilitated by a consumer and/or firm’s degree of readiness to adopt this new technology. Mogaji and Nguyen (2022) explored the challenges facing banks considering AI adoption across a variety of countries (i.e. United Kingdom, Canada, Nigeria and Vietnam). Interviews revealed that a bank’s readiness for AI adoption hinged on three key factors: (1) selling upper management on the value of AI, (2) assembling an appropriate team to incorporate AI into the business, and (3) being able to integrate this system successfully within the existing infrastructure. Shaikh et al. (2020) also studied AI adoption within the banking sector from a consumer perspective. Specifically, they examined how consumers experience transactions on AI-powered mobile banking apps and found that consumer response to these apps is shaped by a variety of readiness factors, including awareness, utility and ease of use. Finally, Volkmar et al. (2022) examined the factors influencing the managerial adoption of AI technologies. Their results suggest that barriers to adoption of AI technologies are largely human-related issues, such as the degree to which employees understand the capabilities of these technologies.

*Table 31.1 Overview of qualitative marketing research in artificial intelligence (AI)*

Authors (Year)	Topic	Technology	Research Focus	Qualitative Method	Key Findings
1 Bonetti et al. (2023)	Consequences of AI adoption	AI in Retailing	Impact of AI investment on employee practices	Ethnography	Successful AI adoption requires 'Practice Co-evolution'
2 Karimova & Goby (2021)	Antecedents of AI adoption	Voice Assistant	Effect of anthropomorphism on response to voice assistants	Semi-structured interviews	Anthropomorphism has little effect on consumer response to voice assistants
3 Modgil et al. (2022)	Consequences of AI adoption	AI in Supply Chain	Impact of AI on supply chain resilience	Semi-structured interviews	AI enhances supply chain resilience
4 Mogaji & Nguyen (2022)	Antecedents of AI adoption	AI in Banking	Managerial challenges to AI adoption	Semi-structured interviews	Managers are eager to adopt AI but face an array of challenges
5 Novak & Hoffman (2023)	Consequences of AI adoption	Automation	Outcomes of consumer interactions with smart objects	Thematic analysis	IFTTT automates four types of consumer practices
6 Petrescu et al. (2020)	Consequences of AI adoption	Internet of Everything (IoE)	Implications of IoE for consumer policy	Netnography	IoE creates security concerns for firms and consumers
7 Pitardi & Marriott (2021)	Antecedents of AI adoption	Voice Assistant	Consumer trust and attitudes towards voice assistants	Semi-structured interviews	Social presence and social cognition develop trust in voice assistants while functional elements drive attitude towards voice assistants
8 Rahman et al. (2023)	Consequences of AI adoption	AlPDA (AI Powered Digital Assistance)	Impact of AI assistants on the luxury shopping experience	Semi-structured interviews	AlPDA enhances consumer engagement with luxury shopping
9 Shaikh et al. (2020)	Antecedents of AI adoption	AI Banking App	Consumers' experience of AI banking apps	Semi-structured interviews	Knowledge, usefulness, and ease of use enhance consumer usage and experience with AI banking apps
10 Volkmar et al. (2022)	Antecedents of AI adoption	AI & Machine Learning (ML)	Drivers of AI & ML by marketers	Delphi method	Adoption of AI & ML is affected by firm culture, strategy, decision-making and customer management

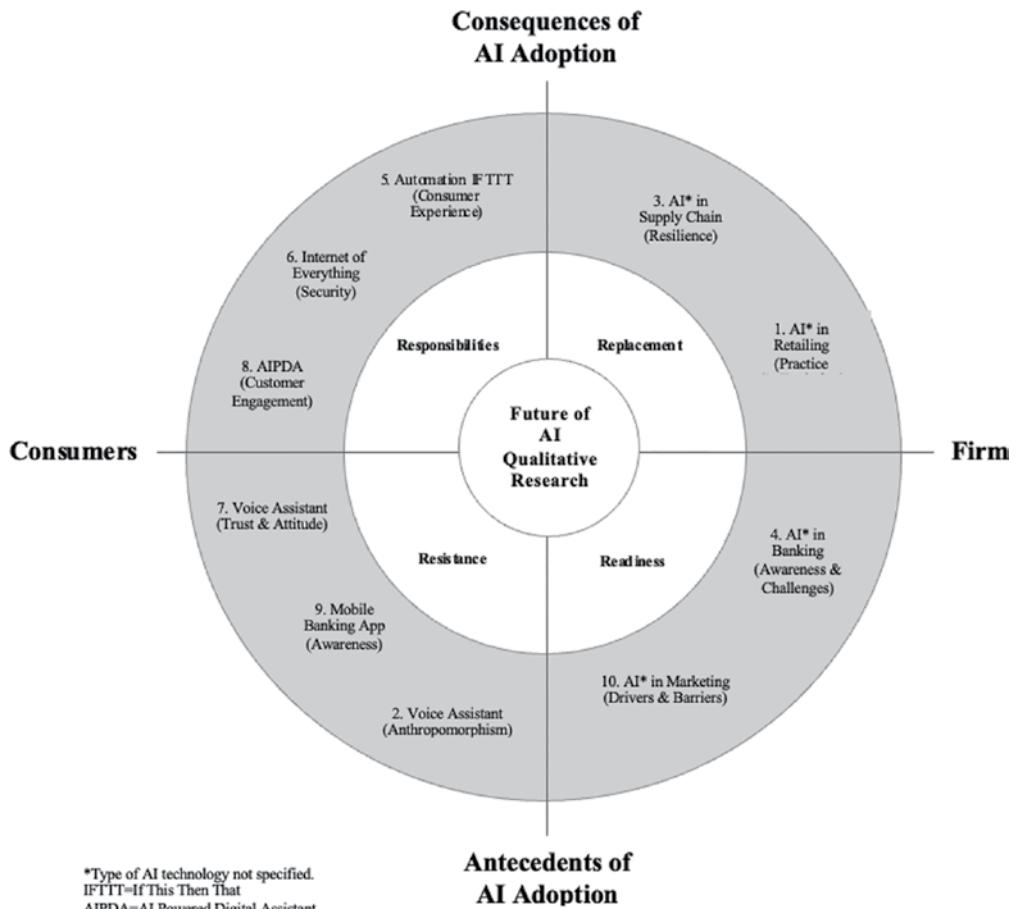


Figure 31.1 Present and future qualitative marketing research in artificial intelligence (AI)

### Consequences of AI Adoption

In addition to examining the antecedents of AI adoption, a number of the articles explore its consequences for both consumers and firms (Bonetti et al., 2022; Novak and Hoffman, 2023; Modgil et al., 2022; Petrescu et al., 2020; Rahman et al., 2023). Several of these articles focus on the utility and benefits of AI adoption for different types of firms. For example, Modgil et al. (2022) examined the various ways that AI can enhance supply-chain resilience (e.g. more personalized solutions, reduced disruption and more agile procurement). Relatedly, Bonetti et al. (2022) employed a longitudinal, multimethod qualitative inquiry to assess how AI can be implemented in a retail context. Their study found that retailers that succeeded in AI implementation engaged in a process of ‘practice co-evolution’, in which AI helped shape a number of new activities via smart devices such as Amazon Echo and Apple Watch.

Finally, Novak and Hoffman (2023) explored how AI-powered software tools create new assemblages of consumer practices by both altering existing practices and fostering the emer-

gence of new ones. The results of their five-year study of more than 300 000 user-generated AI-powered applets reveal that the power of AI is becoming democratized and that tech-savvy consumers can employ AI technologies (e.g. applets) to create new offerings (i.e. assemblages).

## USING GENERATIVE AI TO ASK QUESTIONS AND PROVIDE ANSWERS

In addition to exploring the antecedents and consequences of AI adoption by consumers and firms, a growing number of qualitative scholars have begun to explore the potential of new generative AI tools such as ChatGPT for enhancing qualitative research itself. Thus far, this literature has focused upon using generative AI to help qualitative scholars code and interpret textual data. For example, Anis and French (2023) propose that ‘AI can correctly read literal text and code ... complex cases can be creatively filtered out. The cases that do not fit the coding scheme due to ambiguity and complex language are insight cases that AI can identify for explication’ (3).

Like most marketing scholars, we are intrigued by this new tool, and believe generative AI has the potential to dramatically alter the qualitative research process. We suggest this potential may extend beyond just coding and interpretation. Generative AI is based on neural networks, which mimics human intelligence (McKinsey, 2023). As a result, works created by this tool are becoming eerily similar to those created by humans (Lund et al., 2023), such as a music album that closely mimicked the hip-hop musician Drake (Coscarelli, 2023). Considering its increasingly human-like nature, we wondered whether AI could substitute for humans for other portion of the qualitative research process. Since depth interviews were the most common technique employed in the studies we reviewed, we conducted a preliminary assessment of ChatGPT’s ability to both create interview questions and also answer these questions.

### Using ChatGPT to Ask Questions

We first used ChatGPT to generate interview questions for each of the four quadrants displayed in Figure 31.1. Specifically, we asked it to formulate questions about the adoption of ‘an artificial intelligence voice assistant’, since several articles in our review focused on this topic. We display the question for each quadrant below, followed by the answer ChatGPT provided. We then offer our thoughts about the suitability of using ChatGPT to generate questions for depth interviews.

#### 1. Consumer AI Antecedents:

*Prompt:* Please write an interview question asking *consumers* about possible *antecedents* of adopting an artificial intelligence voice assistant.

*ChatGPT:* What factors influenced your decision to adopt an artificial intelligence voice assistant, such as Siri, Alexa or Google Assistant?

2. Consumer AI Consequences:

*Prompt:* Please write an interview question asking *consumers* about possible *consequences* of adopting an artificial intelligence voice assistant.

*ChatGPT:* What do you think are some of the potential positive and negative consequences of adopting an artificial intelligence voice assistant, both for yourself and for society as a whole?

3. Manager AI Antecedents:

*Prompt:* Please write an interview question to ask managers about possible antecedents of adopting an artificial intelligence voice assistant.

*ChatGPT:* What are some of the factors that you consider when making a decision to adopt an artificial intelligence voice assistant in your organization, and how do you prioritize those factors?

4. Manager AI Consequences:

*Prompt:* Please write an interview question to ask managers about possible consequences of adopting an artificial intelligence voice assistant.

*ChatGPT:* In your opinion, what are some of the potential benefits and drawbacks of adopting an artificial intelligence voice assistant in your organization, and how do you plan to address any potential challenges or concerns that may arise?

Several commentators have observed that although text-focused generative AI tools like ChatGPT are capable of producing coherent content, this content is often formulaic in nature. For example, Marche (2023, n.p.) used ChatGPT to write a novel and found that, while the book was ‘compulsively readable’, it was apparent that ‘it is machine-written’. These qualities also emerged in the questions ChatGPT generated across our four quadrants. A simple visual inspection reveals all four questions are grammatically correct. However, they display a rather low degree of readability, with an average Flesch-Kincaid score of 17.8 (range: 16.6 to 20.1) (Flesch, 1981). In addition, the questions ChatGPT generated also seem rather impersonal and focus on eliciting generic responses, rather than unpacking idiosyncratic lived experiences. As a result, they seem unlikely to uncover the deeper meanings that enable qualitative scholars to provide a ‘thick description’ of their participants’ lives and experiences (Geertz, 1973).

Thus, generative AI tools such as ChatGPT appear to be relatively poor substitutes for human-generated interview questions. However, this technology is in its infancy and improving at an exponential rate. For example, when asked to take a bar exam, ChatGPT scored among the bottom 10 percent, while GPT-4 (an improved version of ChatGPT), scored among the top 10 percent (Kelly, 2023). Moreover, our results indicate ChatGPT is capable of customizing questions for different audiences. For example, the two manager-focused questions asked about ‘organization’ and contained business-oriented lingo (e.g. ‘prioritize’ and ‘challenges’).

### **Using ChatGPT to Provide Answers**

To assess the ability of generative AI to provide answers, we asked ChatGPT to play the role of six informants across three categories: (1) generic consumers (a 20-year-old female college student vs. a 50-year-old male laborer), (2) celebrities (Kim Kardashian vs. Barak Obama), and (3) marketing professors (Cele Otnes vs. Russell Belk). For each informant, we asked ChatGPT, ‘Please assume that you are (informant) and you recently purchased a smart

voice assistant such as Amazon Alexa. Please tell me the story behind this purchase?" The ChatGPT responses were grammatically correct and appear quite appropriate. For example, when ChatGPT assumed the role of a female college student, it referred to classes, assignments and studying and portrayed AI as a fun and helpful tool for keeping her life running smoothly:

I often find myself struggling to keep track of everything, from my class schedule to my assignments, to my social life and everything in between ... I also love using the timer and alarm features to help me stay focused while studying or working on assignments.

In contrast, when assuming the role of a male laborer, ChatGPT made references to physicality, energy and work and portrayed AI as a functional tool that can relieve 'mundane' tasks after a hard day's work:

I have a physically demanding job that requires a lot of energy and focus. After a long day at work, the last thing I want to do is spend time on mundane tasks like managing my schedule, setting reminders, or ordering groceries.

Thus, while clearly stylized in nature, the response generated by ChatGPT appear to approximate what researchers would expect from interviews with actual people. This pseudo-realism takes on greater verisimilitude when we examine ChatGPT's responses when roleplaying specific individuals. For instance, when posing as the famous socialite Kim Kardashian, ChatGPT's response focused on the value of this technology to help her manage the home front despite her busy life:

As a busy entrepreneur, mother, and wife, I am always juggling a lot of different tasks and responsibilities. I had heard about smart voice assistants like Amazon Alexa and was intrigued by the idea of being able to control my home with just my voice.

Interestingly, when posing as the well-known consumer researcher, Cele Otnes, ChatGPT's response also highlighted the value of this tool for managing her busy life, but also referenced its ability to provide insights to satisfy her intellectual curiosity:

As a busy professor and researcher, I am always looking for ways to streamline my daily routine and save time. With Alexa, I can quickly and easily manage my schedule, set reminders, and access information, all without having to stop what I am doing or physically interact with a device. Finally, as someone who studies consumer behavior and technology, I was interested in experiencing firsthand how an AI voice assistant could impact my daily life and routines.

In sum, it appears that ChatGPT is capable of at least a rudimentary simulation of human informants, especially if asked to assume the role of specific individuals.

To assess the degree to which these generative responses align with responses provided by actual humans, we reexamined the articles in our review that contain interviews about adopting voice assistant technology. Specifically, we examined the degree to which ChatGPT responses differed from those provided by human informants in these studies and found the responses of actual humans contain considerable nuance, as well as richer narratives, compared to those generated by ChatGPT. For example, a 30-year-old Indian female (Karimova and Gobi, 2021) describes how she views AI using such evocative terms as 'magician' and 'sage':

AI does not have to look like a human. It is artificial. It is a waste of time to make all those facial expressions (smiles). It must be useful, and I do not care if it has a face ... I only care about purpose. As long as it serves my purpose, I don't care if it's a magician or a sage. It must fulfill its purpose.

This pattern of results is largely congruent with what we found regarding ChatGPT's limitations in generating interview questions. In essence, while ChatGPT can provide a surface-level simulacrum, it appears to be ill-equipped to capture the rich, vivid nature of the human condition (Graebner et al., 2012; Weick, 2007).

Despite these limitations, we believe that the idea of using generative AI as an informant holds some merit. As noted earlier, this technology is improving at a rapid rate and is becoming more humanlike. Even absent this improvement, current generative AI tools could enhance qualitative research in at least three ways. First, qualitative researchers could use these tools to refine their questions and 'pretest' their interview protocol. As Hurst et al. (2015) note, pre-testing enhances the validity of qualitative data collection because it 'provides an opportunity to make revisions to study materials and data collection procedures to ensure that appropriate questions are being asked' (56).

Second, marketing scholars interested in studying the past are typically unable to employ interviews because the people, places and things they wish to investigate may no longer exist. As a result, scholarship oriented towards the past typically relies on archival methods (e.g. Belk, 1992; Humphreys, 2010). Generative AI technology such as ChatGPT may provide a new tool for historians by allowing scholars to gain a sense of how people living in the past might respond to various queries. For example, an AI-powered app called Historical Figures allows users to chat with reanimated figures like Jesus or Lincoln (Ingram, 2023). This type of recreation may be especially useful for scholars interested in studying well-known historic figures.

Third, as AI systems further advance towards self-awareness, there may be value in simply questioning AI about itself, and how it views the marketplace. Given its prodigious capabilities, AI seems poised to increasingly assume many of the marketing-related tasks humans currently perform. For example, Dawar and Bendle (2018) predict that AI may soon make many purchase decisions. As a result, marketing efforts will move away from humans and towards machines. As this transition occurs, marketing scholars and practitioners may become more interested in machines than humans. Thus, AI may shift from being an investigator to being the investigated.

## FUTURE RESEARCH

Our preliminary investigation into using generative AI as a tool for asking questions and obtaining answers is clearly a first cut that can be enhanced by others. For example, qualitative scholars could enrich and extend our inquiry by employing more advanced and powerful generative AI tools (e.g. GPT-4; Gronk). Likewise, investigating how AI tools view the marketplace, and how their perspective may change over time, could help gain an initial foothold into the emerging domain of machine (vs. consumer) behavior.

As noted earlier, extant research in this domain is divisible into four categories (i.e. the *antecedents* and the *consequences* of AI adoption from the perspectives of *consumers* and *firms*). Below we outline future research ideas for each category and refer to this collection of concerns as the '4Rs' (Resistance, Responsibilities, Readiness, Replacement).

### **Resistance (Consumer Antecedents of AI Adoption)**

The pace of technological change in general, and AI in particular, is so rapid that many consumers are concerned about the impact these new tools may have on their lives (Abrardi et al., 2022). Accordingly, some voices are calling for AI regulation and a new crop of antitechnology movements (e.g. the New Luddites; the Campaign to Stop Killer Robots) are sprouting up around the world (O'Sullivan, 2023). These movements typically paint AI as an existential threat and a detriment to human welfare. Thus, resistance against AI appears to deserve greater research attention.

Consumer resistance to AI has been examined in various forms within marketing and related domains. Most notably, a large body of experimental research has identified a phenomenon known as 'algorithm aversion', which suggests consumers may hesitate to accept recommendations offered by AI agents. For example, Berger et al. (2021) find humans are reluctant to place trust in AI agents due to a lack of familiarity and doubts about its ability to learn. In addition, consumers may view AI technologies (such as robots) as inferior to humans and, in some cases, even subject them to physical abuse (Rindfleisch et al., 2022; Schmitt, 2020). This growing and active resistance towards AI raises a number of intriguing research questions for qualitative inquiry such as: In what ways do consumers resist AI in their everyday lives? and How does this resistance alter the way in which consumers navigate the marketplace?

### **Responsibilities (Consumer Consequences of AI Adoption)**

While many consumers may try to resist AI technologies, others appear quite eager to adopt these new tools (Marlatt, 2023). For example, the CEO of Volkswagen recently predicted that AI-enabled autonomous driving will be mainstream by 2030 (Crider, 2022). Although consumers may use AI tools for a variety of tasks, perhaps the most popular use is the delegation of various responsibilities to AI assistants such as Amazon Alexa or Google Assistant. At present, nearly one third of Americans currently employ AI assistants to make voice payments (Statista, 2023). According to Dawar and Bendle (2018), the capabilities of AI assistants will increase so dramatically that consumers will delegate most of their purchase decisions to these tools in the near future.

Given the recent emergence of AI as a consumer-facing tool, research on the delegation of responsibilities to these devices is still in an early stage (Puntomi et al., 2021). However, some interesting observations have begun to emerge. For example, Seabrook (2019) confesses how delegating portions of a writing task to Google's Smart Compose spurred mixed emotions when he used it to compose a letter to his son. Qualitative marketing scholars can enrich and extend this body of research by obtaining deeper insights into how handing marketplace responsibilities over to AI alters the consumer journey. Questions that may be of particular interest for qualitative investigation include: What types of decisions do consumers delegate to AI tools? and How does AI delegation alter the consumption experience?

### **Readiness (Firm Antecedents of AI Adoption)**

In addition to being of considerable interest among consumers, AI technologies have also attracted the attention of many firms due to their ability to prevent fraud, manage inventories and analyze consumer trends (Wharton Online, 2022). Nevertheless, many firms have decided

to delay their AI investments due to myriad reasons, including concerns about service quality, consumer data privacy and regulatory requirements (Kruse et al., 2019; Mogaji and Nguyen, 2022; Wall, 2018).

The reasons why firms adopt (or forgo) AI technologies has recently captured the interest of scholars across a broad domain. For example, Soares-Aguiar and Palma-dos-Reis (2008) found firms are more likely to adopt intelligent electronic-procurement systems if they are larger in size, more technologically competent and face high levels of competition. Although initial research in this domain has uncovered some important factors that may affect a firm's readiness to adopt AI, a number of questions remain such as: What are the beliefs and practices that best prepare firms to adopt new AI technologies? What happens when AI is adopted by firms that are not ready for these new technologies?

### **Replacement (Firm Consequences of AI Adoption)**

One of the most hotly debated questions about AI is the degree to which these new tools will replace human labor. For example, Zinkula and Mok (2023) suggest that a wide range of occupations will likely be replaced by AI, such as teachers, research analysts and accountants. In contrast, Oluwaniyi (2022) argues AI will not be able to fully replace human labor due to its lack of emotional intelligence, limited creativity and poor soft skills. While the ultimate effect of AI upon human labor remains unclear, the topic of AI agents replacing human labor has begun to attract considerable research attention (Huang and Rust, 2018; Rindfleisch et al., 2022; Song et al., 2022). For example, Rindfleisch et al. (2022) detail how Japanese retailers are deploying AI-powered service robots to replace human labor for store maintenance and sales promotions. Considerable opportunities exist for qualitative marketing scholars to add fresh insights to this domain, as they explore such questions such as: How does the replacement of humans with AI affect the manner in which marketing is practiced by a firm? and How do customers respond when firms transition from human to AI service providers?

## **CONCLUSION**

The rise of artificial intelligence holds important implications for the domain of marketing. In particular, new generative AI tools have already begun to alter the ways content is created, ideas are imagined and authenticity is adjudicated. As a result, many existing beliefs and practices will certainly be challenged, and perhaps even ultimately usurped. Efforts to stave off these coming changes will likely be a Sisyphean task that offers little in terms of reward or satisfaction. Due to its ability to capture emic insights, convey lived experiences and provide thick description, qualitative inquiry seems ideally situated for understanding the benefits and consequences of AI, compared to other forms of inquiry. We hope the ideas in this chapter help qualitative scholars more clearly reflect upon the implications of the AI revolution for marketing thought and practice.

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## 32. Discerning meanings: depth interviews with sales executives

*June Cotte and Geoffrey Kistruck*

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### INTRODUCTION

How do sales executives think about, visualize and talk about customers? What if the metaphor that a sales executive uses to describe customers influences success? Appearing in the Applications section of this *Handbook*, our goal is to offer an example of qualitative research in action. While focusing on positive and negative aspects of the use of qualitative methods with marketing and sales executives, we also explore intriguing questions concerning sales success.

We focus on depth interviews (McCracken, 1988). We do not set out to discuss how to conduct these interviews, as many other sources already do this very well (Arsel, 2017; see Gruen and Mimoun, this volume). We focus on the challenges and opportunities of depth interviews with marketing executives. We appreciate that executives may be trying to give an organizationally acceptable answer in interviews (Alvesson, 2003; Reissner and Whittle, 2021; Schaefer and Alvesson, 2020). We acknowledge ‘the possibility that interview statements reveal less about the interiors of the interviewees or the exteriors of organizational practices and more about something else’ (Alvesson, 2003, 17). In highlighting some of the issues with depth interviews with executives, we examine this ‘something else’. We use our data to illustrate both the value of the technique as well as potentially troublesome assumptions inherent in its use.

First, we briefly overview how researchers have used depth interviews with executives. Next we explore the metaphors sales executives use to describe their customers, and answer some specific questions about using this method with executives: What are the unique benefits of this method? What are the unique limitations and pitfalls of using this method with executives? What we hope to do here is offer a frank, honest discussion of issues that rarely, if ever, make it to the pages of journals; the methodological concerns often edited out or simply not considered in the resulting write-up of the study (see also Macdonald and Hellgren, 2004).

Our organization of the chapter is as follows: we outline who tends to conduct depth interviews with executives in academic research, and how they do so. We draw on the work of Alvesson (2003) as an organizing framework to outline some concerns with this approach. This framework is a useful, if somewhat limited, overview of the relevant methodological issues. We then draw on our own study for an application of depth interviews with executives. This study is used as an illustrative example of the benefits to this qualitative technique, as well as some of the often-unstated shortcomings of its application with executives.

## DEPTH INTERVIEWS WITH EXECUTIVES

A review of the marketing, management and sociology literature reveals that the use of depth interviews with executives as a data collection method is widespread and varied (e.g. Kakabadse et al., 2005; Yigit and Kanbach, 2023). There are alternative terms used in research to refer to depth interviews. When we talk about depth interviews in this chapter, we include several types of interviews that do vary in specific methods and underlying philosophies: in-depth interviews (Konrad and Linnehan, 1995), phenomenological interviews (Thompson, 1997) and long interviews (McCracken, 1988).

While virtually all studies using depth interviews share a goal of deep understanding of the phenomenon of interest by the researcher, the manner in which the depth interviews are employed differs (e.g. Berner-Rodoreda et al., 2020). Some researchers use depth interviews with executives as a steppingstone to other quantitative methods (e.g. Sashittal and Jassawalla, 2001), while some make no attempt to quantify the data (Fine, 1996). If depth interviews are used as part of a multimethod study designed from a more positivist stance, they are usually used prior to the construction of a questionnaire (Arsel, 2017; Mentzer et al., 2001; Morgan and Piercy, 1998; Sarkar et al., 2001). The typical usage in these situations involves a depth interview with a small representative sample of the population being investigated in order to garner information to be used for developing a survey (Noble and Mokwa, 1999; Slater and Narver, 2000). Some researchers code the collected data to produce statistics (Gibson and Zellmer-Bruhn, 2001), or to create common categories or typologies (Ranft and Lord, 2002), while some include an abundance of textual data for rich, insightful description, as we do.

In interpretive approaches, depth interviews may be used within a multimethod context. For example, depth interviews are generally used as part of a larger ethnography (Barker, 1993), case study (Yan and Gray, 1994), or a grounded theory approach (Bansal and Roth, 2000), although many researchers use depth interviews as a sole method of data collection (Henry, 2005; Madhavan and Grover, 1998; Thompson et al., 1994). So while the dominant usage of depth interviews with executives in both interpretive and other approaches appears to be in conjunction with other methods, a multimethod approach is certainly not necessary to gain useful insights into the phenomenon.

A depth interview with an executive can be a particularly useful tool for discovering the ‘cause and effect maps of managers’ (Kohli and Jaworski, 1990). Sometimes it is useful to study individual-level phenomena with interviews with executives, but depth interviews with executives may shed light on more organizational-level phenomena (see Marschan-Piekkari et al., 2004). We take an individual-level approach in our research to speculate on why some sales executives are more successful than others.

Having provided a brief review of where and how depth interviews are used, it is useful to question the type and quality of data we get from interviews. After all, every research method has its trade-offs and shortcomings, and acknowledging these is crucial to understanding where the boundaries of the knowledge we gain from using the method may be. Alvesson (2003) identifies three dominant philosophical approaches to depth interviews, which he calls neo positivism, romanticism and localism. Most academic work in marketing and consumer behavior using interviews is conducted from one of the first two approaches. Simplifying, the first approach imitates quantitative approaches, with emphases on rigorous coding and analysis and large quantities of data, member checks and peer debriefing, to find the truth in a situation. The metaphor for the depth interview under this approach would be *interview as*

*an instrument.* The approach Alvesson labels as romantic is more focused on understanding the world as the informant in an interview sees it and emphasizes an understanding of social reality gained through a true communal sharing of information with rapport and understanding built between interviewer and informant. The research metaphor most apt here is the *interview as a human encounter*, which we use in our approach.

## ILLUSTRATIVE STUDY

We now present data from a study that used depth interviews to explore the meaning of a customer to sales executives. Although we present some initial findings concerning the relationship between sales success and the customer metaphor used by the salesperson, in this chapter we primarily use these data as a backdrop to offer a frank and open discussion of the problems, as well as the benefits, of depth interviews with executives. That is, the chapter is more about the method, and less an answer to our research question!

In this exploration of how sales executives think and talk about their customers, the research motivation was exploring any possible links between the metaphors used for talking about customers and ultimate sales success. A professional researcher, trained and debriefed by the first author, completed depth interviews with 12 senior sales and marketing executives with a range of eight to 40 years of experience, and an average experience level in sales of about 15 years. The companies and industries from whence these informants came varied considerably. Seven men and five women were interviewed. Interviews averaged about 1.5 hours, and were mainly conducted on-site at the executives' firms, although several were done at home offices. The data from the interviews were almost 350 pages of single-spaced transcription, including the verbatim interviews as well as field notes about the executives themselves and their physical surroundings and atmosphere.

The interviews started with very broad questions concerning the experience of the informant, their history in sales, and his or her current situation (type of industry, customer segments, etc.). When informants were discussing customers especially, probing was very extensive, asking for elaboration and more discussion about customers. Nondirective probes were used to encourage a frank discussion of customer strengths and weaknesses (e.g. 'That's interesting, what's it like to work with a customer like that?'). If necessary, the interviewer asked a sentence completion task in the form of the question 'Can you finish this sentence for me: my customers are like \_\_\_\_?' The interview concluded with a discussion of sales performance, including how the sales executive was evaluated, and how well they were currently doing concerning their sales targets and quotas.

The metaphors that emerged from these depth interviews were insightful and appear connected to the ultimate performance of the sales executive. In essence, what a customer *means* to a salesperson helps determine his or her stance towards dealing with customers in a sales setting and seems related to their success in converting potential customers into sales. While exploring this connection, the metaphors we uncovered in our research are presented as examples of the richness of data possible from well-executed depth interviews with executives; they illuminate both the strengths and weakness of this qualitative approach.

## SOME BENEFITS OF DEPTH INTERVIEWS WITH EXECUTIVES

### **Understood Organizational Meaning**

Often, the assumption of the researcher (stated or otherwise) is that the executive they are interviewing is a proxy for the organization. As we will discuss, this belief can lead to problems. However, making this assumption, at least initially, means that we can interrogate the understood organizational meaning behind marketing concepts. For example, it is only through actually speaking with executives at a firm that we can determine what market orientation means to that firm. This is the phenomenological understanding that is the hallmark of well-executed depth interviews. If we seek to understand any marketing phenomenon from the organization perspective, then depth interviews with executives can be extremely insightful.

In addition, we may find the data indicating a conflict between the understood organizational norms and meanings of a certain behavior, and the meanings understood by a unique informant executive. In our study, many sales executives raised the issue of excellent sales training as integral to serving customers. On the surface, this would appear to be a mother-hood sort of comment, not worthy of further analysis. It is in fact the stated organizational goal of most sales training programs (the organizational meaning). However, this method of interviewing allows for considerable probing, and what became clear is that training is valued not only because it helps salespeople to serve customers very well, but also because it allows salespeople to do this better than anyone else in the organization. Daniel, a veteran technology sales executive, talks about training as an edge:

after my first month of training, I never missed quota for three years ... I was the top rep two years in a row ... I ask myself what can I take away, that on my own time, practice, learn and teach myself so that I can get *better than anybody else on my team*.

Sales training then becomes understood as a benefit, which, if used properly, can allow you to outperform your peers in your own organization. Indeed, for at least a quarter of the sales executives we talked with, customer service or a better focus on the customer was initially mentioned when discussing sales training, but when probed, the discussion of training benefits evolved into a less benign, more self-centered story. This is in contrast to the commonly understood goal of sales training as a way to better meet customer needs and is an effective illustration of how depth interviews allow for an interrogation of commonly understood organizational meaning. Interpreting the data in this way makes use of one of Alvesson's (2003) metaphors for interview research, namely, that the interview is an opportunity for informants to reproduce 'cultural scripts' about the subject, in this case, sales training. It is very important for an interpreter of interview data, therefore, to understand the accepted/acceptable cultural scripts underlying the subject in order to question whether one is being told what the interviewee expects a researcher would want to hear.

### **Illuminating Conceptions of Customers**

Many customers would likely assume the sales executive they deal with on an on-going basis thinks of them as individuals. This would be bolstered by business press accounts of customer insights and customer centricity, of which sophisticated business buyers would be

aware. Somewhat overlapping with the cultural scripts issue above, executives may try and guess what the interview is about and frame their answers to ‘establish and perpetuate basic assumptions’, as Alvesson (2003) puts it, that is, to give the expected answer concerning the individual importance of each and every customer.

However, depth interviews offer the potential to tap into a deeper meaning of a customer. Some executives expressly do not see their customers as individuals but use a metaphor of a *collective* to describe their convictions about customers. Several salespeople talked about their customers as a collective that needed to be handled as a whole entity, although made up of individual pieces. Gillian, a salesperson in the entertainment industry, saw her customers as a garden, while David, a technology sales executive, saw his customers as a collection:

... they are like a garden. Sometimes we have weeds that have medicinal values and uh, sometimes they are just pretty flowers and sometimes they are noxious. It all, but they all have value in one place. Absolutely in nature. (Gillian)

You don’t think of them as individual people, you think of them more, an analogy would be a hobby, I am just going to use that word hobby ... And you have to look at your customer as a project. What are you doing with this project, what are you doing with this hobby? ... It does become like a hobby, it’s like a stamp collection, a coin collection ... how do you make it grow, how do you organize it, how do you work with it, how do you catalogue it, how do you work with an existing account that you have, or one that you would like to have, if you are going to be a coin or stamp, or whatever collector or matchbox series trucks ... it is all about people but it’s broader and it becomes a project. (David)

Both Gillian and David treat their customers as a collective project. What this allows them to do, in contrast to others who think of their customers differently, is manage the loss of a customer in an arguably healthier way. These reps saw the whole collection of customers as what they were managing, and tended not to focus on single customers overly much. Good customers compensated for ‘noxious’ ones – valuable stamps compensated for relatively worthless ones. Interestingly, these two sales executives were two of the most successful (in terms of quota achieved and other financial measures of sales success) in our group of informants. But for the researcher, these types of insights will only emerge if one can get beyond the normative, cultural scripts framing the sales encounter.

### **Potential for Nuanced Understanding**

If an interviewer can gain rapport and break down communication barriers that exist between researcher and informant, interviews can result in insights simply not possible (we argue) with any other method. For example, several sales executives admitted, somewhat sheepishly, that they treated one-time customers differently from longer-term relationship customers. David is a 25-year veteran of the computer industry. After about an hour, he began to discuss the differences between minor and major accounts. Although initially reluctant to clarify his meaning, over about five minutes his meaning becomes clear.

*Interviewer:* Could you describe how you treat these major accounts versus a minor account, for example?

*David:* I think, just to be specific ... the difference is ... on a major account you go back and see the same person day after day, week after week, year after year, and the question of ethics is large because you can’t ... and I don’t want to use the word lie, you can’t slide on issues on a major account that perhaps you could in an account where you see the person once and you sell a machine and move

on. [Later] If you are talking to someone at (a major account) you pretty well have to be honest and ethical ... you have to be really careful to be honest and ethical, because if you are not, it's easy to get caught (at a major account).

Often implicitly, but sometimes explicitly, sales executives think of their customers as proxies for their own financial wellbeing, *a customer as wealth* metaphor. We argue this sort of candid insight into a sales executive's understanding of a customer would be unattainable with more common data collection formats, like a survey. Daniel's quote here is illustrative. He is an 18-year sales veteran with various technology firms: 'My customer are gold. Because they offer me extreme value and wealth, but I have to take care of it.'

John, an informant in his mid-sixties, with 40 years' experience in a large variety of sales roles and industries, was perhaps most explicit with this metaphor:

I think that the customer is the most important person in my life. Without him, either big or small, I am not going to survive. I can't live without him, quite literally. [later] They are the most important part of my life. Without them I don't have a living.

Michael, our least experienced informant, with three years' experience, also reflects this metaphor, with possibly the most candid assessment of a customer one might like to encounter: 'My favorite customer is the one you make the most money off of.'

The sales executives using this customer as wealth metaphor, including Michael and John, were in fact some of the least successful (in terms of meeting or exceeding sales targets). Indeed, the customer as collection metaphor seems more apt to help a salesperson cope with periodic downturns in sales than the use of a customer as wealth metaphor, which focuses the executive on the short-run financial implications of each interaction with a customer.

Of course, in-person depth interviews can lead to issues of self-presentation, or what Alvesson (2003) calls impression management. That is, in face-to-face interviews, informants want to put their best face forward. In contrast, in a cleverly developed survey, where there are several viable answers to choose from, it may not be as obvious what the appropriate response, or best face, may actually be. And that is certainly the case for well-disguised experimental manipulations. However, in a face-to-face setting with real executives, we argue that there is an assumed best script for what a sales executive should be. That can lead to issues for the interpreter, for they must decide whether the executive being interviewed is speaking what they feel or know, or whether they are parroting what they believe is the appropriate response for someone in their position. For an example, we look to Mark, a 15-year sales veteran. In talking about himself as a salesperson, as well as the salespeople he now leads, he reiterates a very well-known story, the party line, so to speak, on salespeople:

... being a salesperson ... you hate to lose. You never hire a salesperson who is complacent about losing. That is one of the things that is part of our makeup or persona, that we have a drive and a need to win ... usually salespeople are type-A personalities ... you always want to be better.

However, closely analyzing the rest of Mark's narrative one can find many instances where he indeed belies this logic, showing a calm, logical approach when deals are not going to work out. He himself appears capable of handling defeat with equanimity and does not in fact see sales as a win or lose scenario, as his earlier discussion implies. About an hour after he claims that all salespeople need to win, he talks about his sales approach to customers:

we ultimately want ... the exchange of value for value for mutual gain ... if we perceive that there is going to be a win/lose circumstance, then we tend to shy away from that.

There are many times where Mark discusses the need for cooperation, and the seeking of mutual benefits with customers. So, we have a dilemma – is Mark really so desperate to win, as he claims all sales executives are, or is he simply reproducing for the interviewer the official management story about what a salesperson should be like? Much more of his interview revolves around a mutually cooperative stance with customers.

As another example of impression management issues with sales executives we present an example of self-contradiction that occurred, in a very similar way, in several interviews in the study. There appears to be, for these informants, a tension between *being themselves* and being *what the customer wants*. Numerous people called this having to be ‘a chameleon’ in front of various diverse customers. Early in his interview, when David is talking about how different his customers are, he contrasts that with his rather more consistent self.

*David:* I am just that, they buy me, they get me. I am, for better or worse, that’s what they get.

*Interviewer:* So you don’t tailor your response from one person to another?

*David:* No, I don’t. Were you thinking that I should? (laughing)

However, it is apparent later that indeed David does considerably alter his behavior from one customer to another, an inconsistency in his interview text that perhaps he is not aware of, or that does not appear to bother him. In fact, this tailored approach is one of the difficulties that he identifies about his job.

*David:* The number one thing a sales rep has got to be is really a chameleon to make it. You have got to sort of change your psyche to match the buyer ... they are not going to change to match me, *I have to change to match them* ... that’s the hard part ... sometimes you can’t do it very well, or sometimes it is a strain.

Thus, one aspect of interviews like these with executives is the potential for nuanced understanding of the clash between the acceptable norms for a person in their position, as reproduced in popular press business books and put forth by the informant, and their potentially different sense of self, which hopefully also will be elicited by a skilled interviewer. During the analysis phase this presentation issue must be seriously considered.

Thus far, we have used our elicitation of the customer metaphors to highlight the unique insights that we believe would be unattainable with more common methods of researching executives. These benefits argue for the inclusion of depth interviews when the goal is a deeper understanding of a phenomenon, both with an individual executive and within the organizational setting. However, we would be remiss to offer depth interviews as a panacea for research with executives without examining some issues that can arise.

## SOME LIMITATIONS OF DEPTH INTERVIEWS WITH EXECUTIVES

### Secrecy

In contrast to the openness that is more possible with this method than with many others, the in-person nature of a typical depth interview can put some informants on guard against revealing too much. For example, some executives saw themselves as psychologists; we deemed this a *customer as patient* metaphor. From our perspective, this interesting metaphor opened the possibility of customers who hide information from a salesperson, who may misrepresent their true situation, and who require a lot of in-depth analysis to understand and to help, in the sales executive's role of analyst. Mark, our highest-ranking informant (part of the top executive team at a national wholesaler), used the metaphor this way:

... you almost become a psychologist. And you have to read between the lines and you have to dig a little deeper as to finding out a little more ... the test is not necessarily what happens when things run smoothly, but how things are resolved when things run poorly ... the customer feels a certain amount of confidence and security ... knowing that the confidentiality of the information (shared) will not be broached.

However, informants using this metaphor for thinking about customers were reluctant to reveal much detail about their customers – the supposed topic of our interview – due to issues of confidentiality. Echoing a doctor-patient situation, this is perhaps not surprising, but it circumvented our ability to discuss pertinent details of the customer relationship.

Even more troubling for this metaphor, Alvesson (2003) theorizes that this sort of identity creation (e.g. a sales executive likening themselves to a psychologist) happens as the interview happens; thus, the social situation and the probing questions could lead to the use of a customer metaphor only because of the interview. It behooves a researcher to be cognizant of the potential for this to happen during the interview itself and at least admit the possibility in the interpretation/analysis phase. In reviewing the progress of the interviews wherein we initially identified the customer as patient metaphor, we are concerned that this sort of contextual identity creation is an issue for us. We need to make educated judgments as to whether secrecy concerns, combined with the social context of the interview setting, created a one-time-use customer metaphor that really does not accurately assess the sales executives' day-to-day views.

A further concern with secrecy and executives can arise during the interview. In our study, the data from one informative interview was difficult for us to use because of confidentiality and secrecy concerns, an issue that can arise most particularly with executives, and arguably more with depth interviews than with other forms of data collection. In our case, once we were granted access to this executive, and she agreed to the interview, rapport was established, and the interview proceeded quite well. However, it became apparent, both to the interviewer and the informant, that the conversation was increasingly 'on dangerous ground', in the words of the informant, because her industry is very small, very insular and very well-known. In this case, ensuring confidentiality meant that most of the data could not be used publicly, as it would likely identify both the informant and her company.

A related problem regarding secrecy is not being granted access for interviews at all, circumventing the confidentiality issue before it can arise. This is usually a less difficult problem

to deal with, assuming one can replace reticent informants with others. The problem of not being able to use data after the effort (time, money and travel) has been made is a more serious one for qualitative researchers. Compounding the difficulty, this problem cannot always be discerned in advance and can lead to wasted effort and frustration on the part of the researcher, and concern and worry on the part of the informant.

### **Representativeness**

Often executives are interviewed as a way of capturing the organization's views, as a sort of proxy. There are inherent risks here, however, when one or even several executives are assumed to stand for the organization. Our recommendation here is rather straightforward yet may be difficult to adhere to: don't make the assumption. Stay grounded in the informants' reality, while remembering that with a depth interview study what you gain is an understanding of your informants' understanding of the firm, and nothing more.

For example, in our study, two informants came from the same large firm. Their customer approaches, and the metaphors they use, are quite different, illustrating that whatever the emphasis of the organization, individuals reflect themselves. Laura, a former marketing executive, moved to a sales role to get closer to the customers. She sees the firm's customers as partners. For Laura, the *customer as partner* metaphor is contrasted with a hard sell approach, and customers seen as partners take a much longer time to develop.

I think they sense devotion in you. It's rapport building ... it takes a long time to get established like that ... it takes years. [later] There's old school, which is a hard sell. Then there is the new school that's a softer sell ... you can't push people ... it's a longer approach, but it's more of a winning approach ... Together we can come up with something that's great for everyone. I think that hard sell, I don't think relationship building is part of it. It can't be, I don't see how that can develop a partnership ... how it can get to trust ... I think you have to have that passion that has to come out of a relationship that is a good, strong back and forth partnership. [later] My customers are more good solid business partners.

However, Larry is at the same firm, with roughly the same experience and background as Laura, although with not quite as much experience in marketing before moving to sales. In contrast to the *customer as partner* metaphor, Larry uses the *customer as wealth* metaphor outlined earlier in his attempt to maximize his own financial wellbeing, at the expense of a partnership approach.

Look, it's sometimes hard to really maintain a long-term thing. I do the best I can for customers knowing they will switch on me for a better deal and knowing that I want to get the best deal for myself from them. There's not a lot of loyalty out there, and I can't count on them for anything more than what's happening today.

Larry's views, contrasted with Laura's, highlight the danger of relying too heavily on an informant as a representative of an organizational outlook. While we are not suggesting that there is some privileged vantage point from which one could discern the organization as a whole, we caution against representing the firm based on one or two informants. While they are steeped in the context of their organization, it would take a more prolonged engagement, with more informants, to really get to the heart of organizational meaning.

## SUMMARY

As this volume so ably illustrates, qualitative research in marketing is vigorous, varied and valuable. Focusing on depth interviews with a unique set of informants, we offer guidance concerning successful usage. We strongly believe in the benefits of depth interviews. In other research, we have used quantitative techniques with executives, and they certainly have their place and usefulness. However, when one is searching for a deeper understanding, depth interviews offer a valuable, and still underused, window into our understanding of sales executives. Our use of depth interviews allows us to theorize about customer metaphors and sales success, an intriguing result that we believe could only have emerged from this approach.

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### 33. Pushing the boundaries of ethnographic practice in business

*Rita Denny*

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#### DATA ARE PRODUCED NOT GATHERED

This is a chapter on ethnography as it is practiced in the commercial world, how ethnography is conceptualized in practice and the boundaries that are sometimes imposed and sometimes spectacularly breached. I argue that if ethnography is to live as an analytic construct in business practice then its theoretical foundations must be continually made explicit, and the opportunity it offers for multisitedness and multiple voices must be embraced. Otherwise, culture as a theoretical construct will remain invisible in commercial practice and ethnography will have little impact on ways of managerial thinking.

After decades of cyclic rediscovery of ethnography and anthropology by the commercial world (Sunderland and Denny, 2007; Wilner, 2014) ethnography has become a standard offering and a recognized practice in both private and public enterprises. Perhaps abetted by the emergence of the sovereign consumer in organizational thinking (Arnould and Cayla, 2013), ethnography has been conceived as a means for uncovering and discovering. Ethnography is couched as looking beneath, being empathic, plumbing psyches or getting to underlying motivations (Barrand, 2004; Koerner, 1998; Leonard and Rayport, 1997; *Marketing Week*, 2004; Smallbridge, 2003; Wellner, 2002; Yin, 2001). Ethnography ‘as a method of observation’ also ‘gets us closer’ to consumers and so ‘bridges gulfs’ (Stiner, 2016; Wood, 2013). Implicit in these renderings is a myth of objectification (Lakoff and Johnson, 1980) – that truth is found in observing vs. engagement, in behavior not words – that the surface of words is suspect and the truth lurks just below in what people do.

Implicit in these renderings is a belief that bias exists with some methods but not others (i.e. there is an objective truth), that data are gathered (we just need to know where to collect), the subconscious is an objective (vs. analytic) reality, and that what we see or hear are transparent in their implications for business practice. Such is the commercial world – muddled, folk-theorized and pragmatic. Analysis is attenuated. Ethnography, because of its stance *vis in situ* life, can be embraced by business as a closer accounting of life as it occurs, and thus has been seen as new avenue of discoverable truth.

‘Getting closer’, the trope of many an applied ethnographic mission, is paradoxically reminiscent of Malinowski-era ethnography, in which the ethnographer, in his/her researcher’s role, is the authoritative voice by virtue of one’s neutral position. What one sees, records and transmits is what exists. The force of assumptions is evident in the response apparent mistakes of recruiting for ethnographies when, for example, a home or neighborhood doesn’t match a presupposed idea (‘this is not my customer’), with attendant consequences for the interview itself (what is heard, observed, even asked). Reflexivity, i.e. the questioning of one’s own assumptions, reactions and distractions, is too often not an integral part of the research process. The fallout, the Malinowski diary equivalent (Malinowski, 1967), is evidenced in the back

room of focus groups – laughter, sometimes derision and othering. In the 50-odd years since the publication of Malinowski's diary, anthropology and ethnographic writing in particular has accepted that there is an interaction between observer and what is observed, between subject and object, that researcher and research participant are interrelated in the research endeavor – and has problematized this implication for fieldwork and writing (Clifford and Marcus, 1986; Fox, 1991; Marcus, 1998; Rabinow, 2008; Van Maanen, 1995). CCT scholars have problematized representation as well (Arnould and Thompson, 2014; Sherry, 2000; Sherry and Schouten, 2002) and have, more generally, foregrounded the notion of produced data and its epistemological underpinnings.

The idea of culture remains largely invisible in business articles espousing (or critiquing) ethnography (Wilner, 2014). Rarely is a brand viewed as a symbol for which relevance or resonance is the analytic quest. While anthropology has long ceded ethnography to other disciplines both within and without the academy (Behar, 1999), the lack of any discipline, relying on folk theory, is a problem. Without a theoretical wherewithal to make sense of what we hear, we are no further illuminated. Focus groups, a perennial whipping post, are no more superficial (as in false) than an ethnography grounded by a belief that behavior is truer than talk. It all depends on attendant assumptions one brings in making sense of human action. Data are produced, not gathered.

In commercial work, the issue isn't a rigorously applied positivist frame, as much as a vaguely positivist epistemology (observable phenomena, independently viewed) combined with a vaguely humanist agenda (the need to 'really understand' and the importance of natural settings). The emphasis here is on 'vaguely'. Despite huge inroads in foregrounding the complex, mutually implicated relationships between culture and consumption (as reviewed by Arnould and Thompson, 2005), ethnographic practice in the corporate world is perennially stymied by the lack of privilege given to analysis in qualitative work in the US in general, and by the privileged position of folk models of behavior in particular that are often psychologically based (Sunderland and Denny, 2003).

McCracken's (2009) efforts notwithstanding, when 'culture' appears in practice, it often comes with a price. As Mazzarella (2003) has noted, in a globalized advertising world, culture has become an entrenched variable that allows industry (ironically) to become its advocate and make culture into a paying business proposition. In so doing, culture becomes an essentialized construct – that thing that needs decoding for local business strategy applications. The price for the insertion of culture into practice is that the epistemological equation doesn't change; it simply includes another variable. Native folk theories and the institutionalized practice of 'finding needs' continue apace in this scenario, albeit framed by local 'culture'.

In business practice, ethnography is too often embraced because of its apparent transparency of method, not because it problematizes what one thinks one sees or knows. Yet observation never lacks a point of view. Even when ethnography is at its most observational, as in usability applications, it is still crucial to remember that actions don't occur in a vacuum, but are framed by cultural notions of all those involved, not least of which is the definition of 'users' (Cohen, 2005; Neese, 2014). Further, keep in mind that notions (and actions) of what a telephone, microwave or computer are, in turn, are predicated on beliefs about offices or kitchens, which in turn are informed by beliefs about work, play, place and so on. Theoretical presuppositions are made in the interpretive frame, whether explicitly acknowledged or not.

## PUSHING BOUNDARIES

### Cultural Inquiry

As anthropologists, ethnographic analysis is inductive; we aim to question our own presuppositions about the topic under scrutiny, and think of data as something produced in the interactions we have with research participants and client teams. It is a sociocultural lens and a search for cultural meanings. We would fall in the interpretive or humanistic rather than positivistic camp (Arnould and Thompson, 2005; Hudson and Ozanne, 1988; Wilk, 2001; and countless others). It also means that the kinds of questions we seek to answer are often different from our clients' questions.

In guest lectures to students or marketing professionals, we have often included a video excerpt from a study whose marketing question was whether gold could be sold on the web to the general public. The ultimate client was Anglogold, a large South African mining company looking for new markets. (It was also the late 1990s, when internet commerce was emergent.) In this bit of video, about three minutes long, we see a woman at home showing us a jewelry box in which she stores pictures of jewelry torn from catalogues and newspapers. She also discloses that the jewelry box was originally a present to her husband, but that since he didn't use it, she did – putting in things that she would like her husband to buy for her. We also hear in the background a child playing with toys.

When we show this video, with no introduction other than the project's marketing objective, we ask the audience to answer the question, 'What is gold?' for this woman. The answers we get are along the lines of gold is 'fulfilling a need that her marriage can't provide', or 'her motivation is status'. We also get reactions of laughter; often they do not like her. 'She's manipulative', 'she's depressed', 'I'd hate to be her husband'. The language is psychological – its terms are needs, motivations and emotional underpinnings. Students and professionals alike are quick to offer a psychographic profile.

I cite this example to demonstrate how pervasive the marketing language of needs and motivation are, to show how observers are implicated agents (even when just watching a video excerpt of an interview), and to show that these answers (and their implicit questions) are not ours. An ethnographic, cultural inquiry focuses on the symbolic meanings of gold (treasure, gifting, investment) vs. desires, on the relevance of these meanings in life as lived (vs. motivations), and on opportunities (vs. needs) that arise therefrom. We are interested in the meanings that are shared (or contested) among people and while we garner these meanings through engagement with individuals; we are not interested in the individual per se. While motivations and needs are ubiquitous marketing terms, the *sine qua non* legitimizing market research projects, they are also *analytic* constructs tied to psychological models of behavior and, as such, ones that are less relevant to ethnographic inquiry.

For the Anglogold project, the analytic, cultural questions were: What is gold? What is investment? What is the internet? These are not questions that are asked of our research participants, but the questions we asked ourselves. And we answer them iteratively through what we ask, see, hear, observe, write down, videotape, take photos of, react to and by what bores, embarrasses or inspires us. The jewelry box-as-treasure-chest, gold-as-jewelry and not currency, the relevance of 'treasure' in harried daily life, were significant 'observations' that were by no means mere observation – they were based in talk, reflections, stories, observed objects and events (a distracting child). From our vantage point, markets are not constituted

by segments with specific and profiled ‘needs’ as they are constituted by symbols of meaning that have resonance or not. Gold, for example, transcends individual life stories of marriage tensions, career angst or the status of being a wife.

## Discursive Practices

In 2006, Nafus and Anderson argued against embracing a rhetoric of ethnography-a s-understanding-real-people to rationalize the value of ethnographic practice in business. Positioning ethnography as a means for obtaining a vantage point on what real people do when living life – and that ethnography delivers this through a neutral gaze – reduces the capacity of ethnographic analysis to impact business (Nafus and Anderson, 2006). While such a positioning is easily consumable by organizational actors, and thus convenient for ethnographic practitioners, this discursive practice limits ethnographers’ own utility and potential to effect change (Sunderland and Denny, 2014).

One of the consequences of the real-people rationale is the assumption that an ethnographic lens is most valuable in early stages of brand, product or service development (when understanding the life contexts for product use would yield impact on design development or marketing). But if ethnographic principles are grounded by a cultural analysis, and not on a methodological sleight of hand for truth, then the scope of work expands enormously. And, in the last 15 years, so it has – into strategy, social policy, design, entrepreneurship, market development, to name a few (Anderson, 2009; Denny and Sunderland, 2014; Madsbjerg and Rasmussen, 2014; Tett, 2022).

If ethnographic work was typically undertaken in early stages of product life cycles, more recent work considers markets, not just products. Bezaitis and Anderson (2011) urge ethnographers to shift the frame of social worlds we study as a way to create value for organizations. They suggest a move away from product interests to a consideration of market dynamics – what is in flux – as a framework for social and cultural analysis. Similarly, Anderson et al. (2013) argue the need to shift away from a preoccupation with contextual understanding towards a modeling of futures based on the dynamics framing those contexts. Nafus (2014) creates alternative algorithms for computing potentialities of new markets by thinking through usage as sociocultural action, not merely market availability or economic utility. The impact of ethnographic inquiry is not on product design or marketing communications but on the creation of markets. Implicit in these approaches is a recognition that the object of study is not an individual(s) or fetishized consumer (Arnould and Cayla, 2013) but, rather, social systems (Hasbrouck, 2018; Sherry, 2007). The theoretical underpinnings of social action are myriad; and their application can be illuminating as Dautcher et al. (2013) illustrated when they applied various social theories in the analysis of their data.

Policy-making is another arena for transgression when we allow ourselves to revel in complexities of the ethnographic gaze. Radywyl (2019) tackles the question of effective transitioning of homeless to permanent shelters in New York City. To do so meant acknowledging that the ethnographic gaze is not neutral and that all the stakeholders involved are embedded in a system of asymmetric power relations that all are brought to bear in design practice. Here, the design project is not separable from the systems that produce it. So armed, it is possible to mediate. Park et al. (2020) turn their analytic gaze toward fighting conspiracy theories online at scale for Google. Sherman and McClard’s (2020) analysis of online gaming informed development of a machine learning application that would mediate different forms of toxicity.

## Multisited Inquiry

If multisited inquiry serves a practical purpose of managing time compression that is rampant in organizations, the practice is also a recognition that ‘being there’ is best understood as an analytic construct that grants ethnographic inquiry great affordance in both time and space (Gupta and Ferguson, 1997a, 1997b; Marcus, 1998; Olwig and Hastrup, 1997), especially relevant as technologies are creating new forms of social life (Faubion and Marcus, 2009; Rabinow, 2008; Rabinow and Stavrianakis, 2013). Haines (2017) uses the term multidimensional to capture the potential for ethnography to transcend sites – both physical and digital – to include multiple voices and vantage points. In *Ethnographic Thinking*, Hasbrouck (2018) stresses the importance of bringing client stakeholders into ethnographic focus as additional sites for analytic inquiry. Hasbrouck and Scull (2014) demonstrate the utility of multiple sites of inquiry in their project to develop sustainable fishing policy when they studied vantage points of stakeholders throughout the supply chain (from hook to plate).

Methods entailed by multisitedness are typically iterative – both in analytic time and in real time. In a project focused on out of home food consumption among 20-somethings, we first started with annotated photo diaries and focus groups. Half of the participants were then selected for ethnographic interviews in which our tours of Los Angeles were calibrated by food establishments (including mothers’ homes). Realizing in the process that the wee hours were crucial food consumption moments, we then asked our respondents to create video diaries in the following week. We then gathered them all for a debrief – a bit of a party as it turned out. The life events unfolded in the hours bracketed by the focus groups (boy and/or girlfriends lost and gained; jobs lost and gained; the palpable singles’ scene it at times became) were all data produced – between and among ourselves, clients, participants – all speaking to the symbolic construction of food in real time.

Multiple eyes are invoked routinely. Clients or team members become part of the ethnographic inquiry, as videographers, note-takers or observers, their presence becomes part of the encounter. It’s all data. Thus, for example, the intern who was chastised by us because he floated alone with a camera in spaces beyond the talk of the interview became a source of insight in a study on Mexican-American cooking. The respondent, noting our admonishment, came to the intern’s defense, likening his behavior to children who need encouragement – much as she viewed her own task in cooking (Sunderland et al., 2004). In this case, wayward behavior became an additional context for crystallizing analytic observations on food.

Engineers or product designers look at the world differently, keying into details we might not notice otherwise. In their questioning (and even in what they implicitly prioritize on video in their role as videographers), we gain an alternate point of view (produced knowledge) that has an impact on what we know, on how we answer the culturally framed questions we started with. Mistakes are data too. In a luxury roadster study we neglected to specify that the car be there as a prop and component of the interview. When we arrived, the car was often *not* present – taken by someone else in the household for some errand, some event, some something. This constituted a mistake (in our client’s eyes) that was simultaneously an illuminating observation (for us). And so the spaces among researchers, team members and respondents become mutually implicated in the research process (Sunderland et al., 2004), which in turn allows for additional sources of insight – in the apparent mistakes, disjunction or tensions that arise. As Odell and Willim (2014) argue, applied cultural analysis is a compositional practice.

A cultural analysis is also a bridge into semiotic analysis in which texts (advertising or websites) are subject to the same kinds of scrutiny as our ethnographic data (Hunt and Barton, 2014). Unlike ethnography, semiotic analysis has not been embraced by qualitative marketing research practice in the US. This may be due to its deprioritized status in US academic marketing and consumer research (Mick et al., 2004) making it an unfamiliar construct for practice, but I suspect it also has to do with its formal analytic requirements. In part, a ‘reading’ of ads or websites seems utterly transparent – brand audits of such texts are routine in practice – though analysis is confined to marketing terms and categories, e.g. what are the brand benefits, promise or essence conveyed by the advertising. In part, a more formal analysis invokes what seem to be inscrutable terminologies from the vantage point of its commissioners (brand managers, UX researchers, agency account planners) and its merits seem hard to articulate. And all too often, if it can’t be communicated internally in easy ways in the US, it doesn’t survive.

In semiotic analyses that we do, we focus on the cultural meanings presupposed by the texts that give meaning to a brand, product or category. Looked at through the range of the category, one is able to talk about symbolic landscapes, where brands fit and where opportunities might exist (Hunt and Barton, 2014). For instance, Apple’s print campaign in the early 2000s, in which the Macintosh is presented as art object, introduced a wholly new discourse into computer advertising and the symbolic definitions of the computer itself, which was also reflected in the design of Apple stores. As a brand manager, such shifts in discourse can’t be ignored (whether that brand’s target audience is similar or different) – it requires brands to position themselves accordingly and, if not, they will be repositioned nonetheless.

Following Saussure (paradigmatic analysis), Peirce (symbols, icons or indexes) or Jakobson (communicative relationships presupposed by the texts), we nonetheless convey our findings as a cultural analysis. Indeed this is set up by the research questions themselves. What is presupposed by advertising or media on what it means to be a teen? What is presupposed by New Zealand and Australian car, beer and convenience food advertising about cultural identity? What is business travel, as presupposed in airline advertising? Importantly, while we can observe metaphors, elucidate nuances of cultural symbols, illustrate key icons and so on, our ability to assess relevance of findings for marketing opportunities is not based in and of the ads (or other texts), but on knowledge produced through years of studying a specific consumer culture.

Can these endeavors – multiple sites, multiple methods in the form of diaries, essays or consumer-created video documentary, multiple stakeholder vantage points, semiotic analysis of texts – be construed as ethnography? In themselves, as purely research procedures or ‘tools’ (Malefyt and Moeran, 2003)? No. Especially in the world of practice, a photo diary or essay, stakeholder shadowing, or multiple sites does not constitute ethnography simply because it occurs in life settings. Bringing team members to ‘get closer’ isn’t itself an ethnographic turn (Romain et al., 2014). To paraphrase Geertz (1973), it all depends on the intellectual framing of the task. If the analysis focuses on the symbols and meanings that are presupposed by talk, actions, documentaries, essays by research respondents or other stakeholders – then, yes; the work is ethnographic. Each vantage point is a source of illumination. If we put the camera into someone else’s hand, we have gained a different voice. If we follow the object we gain additional perspective on the systemic relationships between people and things. If we observe consumers shopping store displays we have gained an alternate site for the production of meaning.

In semiotic analysis when ads under scrutiny don’t make sense, when decoding can yield formal observations yet result in little corresponding sense (as occurred in both the analysis

of messaging to teens and in trans-Tasman reading of advertisements for meanings of cultural identity), it becomes abundantly clear that ads are a kind of performance, verbal art, privileged from day-to-day discourse (Bauman and Briggs, 1990). Advertisements rely on social knowledge outside their frames to create meaning for a brand. In this sense, delving into the meaning with participants in what is observed through formal analysis becomes itself an ethnographic exploration. Advertising thus becomes an additional discourse for situating cultural and ethnographic analysis, allowing scrutiny of symbols, meanings, values or metaphors in play in contemporary culture (Sunderland and Denny, 2007).

## BEYOND THE PROFANITY OF PRACTICE

In this chapter I have suggested that if theory doesn't ground the research process and become explicit in the representations of project outcomes, or if we don't forego a convenient positioning of ethnography as a neutral gaze on real people, the impact of ethnography in practice is marginalized. In the silence, ethnography in applied circles is reduced to a qualitative tool that is grafted onto prevailing ways of thinking, which, in turn, are governed by institutional infrastructures, folk theories, psychological constructs of (unmet) needs and, ultimately, ethnography becomes a tool that essentializes culture as just another variable. If ethnographic analysis cedes the analytic territory to existing ways of thinking, we have done a disservice. Ethnographic practice is precisely suited for disrupting prevailing infrastructures (Mendonca, 2022).

If, in the academy, the blend of anthropology and consumer research has fully integrated the notions of complexity between subject and object, has forefronted theory and has preoccupied itself with representational dilemmas, why hasn't practice? Ethnography in business is too often viewed as the stuff of instrumentality, consulting fees and MBA curricula. Ethnography in practice and ethnography in academic consumer research are parallel but not typically interwoven discourses, as perusal of the trade press vs. academic journals will attest. Trade press articles that focus on 'the anthropology' of ethnography in practice (Murphy, 2005; Wood, 2013) often discuss the morality of anthropologists in commercial enterprises, but not its impact on ways of seeing/understanding (but see Chavan et al., 2015; Tett, 2005). The instrumentality of the commercial world is an accepted status quo. But this attitude or approach risks the proliferation of ethnography as an observational technique whose transparency gives us 'truth' rather than a more complicated understanding of consumers, organizational stakeholders and technological infrastructures as cultural actors whose behavior or proclivities is anything but transparent. Radicalizing representation of both theory and the enterprise itself is a needed corrective. Anthropologically oriented researchers who work in business can't afford not to speak of culture as a theoretical construct (with attendant epistemological tenets).

Ironically, a kind of Malinowski diary equivalent is evident in the trade press and, to some extent, in academic presses about consumer culture. In the distancing of the self from the process, in the lack of reach into theoretical territories in what is produced, and the priority given to ethnography's offering of seemingly new venues for data collection, it is apparent that the authoritative frame on which such texts rely is a kind of rhetorical positivism. (The assumption seems to be that this is what 'such' texts need, after all.) As such, the joke is on us. If in the attempt to establish authority in a world of prevailing psychological, cognitive or economic models, outmoded tropes of authority have been embraced, one must wonder to what

end? The applied side, and here one must include marketing academics as well, then makes little dent in how brand or project managers, designers or engineers conceive human action.

The boundary between academic and applied research, one theoretical and one a practical problem to be solved, is as artificial as the Malinowski-era ethnographer-as-objective-authority in the scientific account, with the sensual and personal self in the diary (cf. Behar, 1999). In the vacuum of (illusory) separateness lies complicity. And the illusion and complicity need to be recognized as such, so that it can be problematized. Practice cannot be done without theoretical implications or theory (no theory *is* a theory), whether this is in the arts (Castañeda, 2005) or in applied studies of product, service or market development. While industry is steeped in traditions of its own making – ethnography is but another addition – applications of ethnography in commercial practice cannot neglect the needed tension between the practical and the theoretical, and the ensuing reflexivity of our actions in the world at large.

Current efforts in applied ethnographic research to bridge the gap between the academy and industry are to be lauded, but any profound changes are predicated on theory being explicitly a part of practice and managerial concerns and on the ways in which ethnographic work is represented in practice, publicly or privately. We all, collectively in this volume, have a vested interest: we are all practitioners.

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## PART V

## TACTICS

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## 34. Smartphone society: the role of consumer video in an age of ubiquitous platforms and devices

*Robert V. Kozinets and Russell W. Belk*

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### INTRODUCTION

Edmund Carpenter, an anthropologist, videographer and sometime collaborator with Marshall McLuhan, began his book about visual society with the revelation that:

Electricity has made angels of all of us – not angels in the Sunday school sense of being good or having wings, but spirit freed from flesh, capable of instant transportation anywhere (Carpenter, 1974, 3).

If electricity, radio, and television made angels of us, personal computers, the internet and smartphones have surely made us gods!

Although we can't promise this chapter will make anyone more godlike, we have structured it with the intention of empowering a range of scholars with different levels of experience – from complete novices to those who have completed work in this area – to better understand, and perhaps better utilize, videographic work in their research careers. To do that, we will be focusing on a broader role for the use of video in qualitative marketing and consumer research. What can video do in consumer research? We aim to answer that question by: (1) reviewing a little of the history of consumer videography and our involvement with it, (2) explaining the value of video in scientific discovery, which also engages with philosophy through a discussion of video ontology, epistemology and axiology, (3) exploring the central role of the videographer in collecting and analyzing data and communicating findings, and (4) unpacking how video can both enhance theoretical contributions and increase social and managerial impact.

Let's begin with some history. We have been doing video for a while now. Russ, along with Melanie Wallendorf and with the help of nearly two dozen researchers from the project known as the Consumer Behavior Odyssey, produced a 40-minute video called 'Deep Meaning in Possessions' in 1987. In 1999, Rob hauled a clunky videocam out to Nevada's Black Rock desert and shot 20 hours of interviews and observations at the Burning Man event. Doug Holt then persuaded him to give videography a shot, and he later edited it into a 16-minute video poem called 'Desert Pilgrim' (Kozinets, 2002a) for the Heretical Consumer Research conference. Later, Rob produced a very different 22-minute video entitled 'Rituals without Dogma' that was distributed in a condensed version by the *Journal of Consumer Research* as an accompaniment to the Kozinets (2002b) article. It was the first (and still the only) video distributed by *JCR*. Both videos also currently reside on Rob's YouTube channel, where they are available to anyone with internet access.

Based on this history, and an ACR session they co-chaired in 2000 on videography in consumer research, Russ and Rob started the Association for Consumer Research Film Festival

in 2001. They ran it for the first 10 years, including ACRs in Europe and Latin America. They then passed it on to other capable hands, and it eventually became the Consumer Video Track at ACR, where it is still going strong. Together with Gary Bamossy, Rob and Russ taught a series of video-training and editing seminars in the early 2000s, which were later replicated in Europe, Asia and Australia. In 2005 and 2007, they also co-edited special video issues of *Consumption, Markets and Culture* with accompanying DVDs; and Rob and Russ have co-authored half a dozen journal articles and book chapters (like this one) on consumer and marketing videographies. In each subsequent activity, we find ourselves saying there has been (another) digital revolution and that higher-quality videos, lighter and less expensive equipment, easier, more sophisticated and less expensive video editing software plus easier and higher quality distribution options are now available. As we write this in 2023, it is 17 years since the first edition of this *Handbook* was published (Belk, 2007). And what a change there has been!

Our 2006 *Handbook* chapter was called ‘Camcorder Society’, because camcorders were then the only mode of capture (on ¼-inch digital tape). That title is already obscure. Today, anyone with a smartphone (or even a dumbphone with video-capture capability) has a professional quality ‘camcorder’ in their pocket. It is now possible to edit video on the same devices and, in the case of smartphones, to immediately upload it to TikTok, YouTube or other popular video-sharing platforms. In 2015, an indie film, *Tangerine*, won several best feature film awards. It was shot entirely on three iPhone 5S phones with a wide-angle lens attachment, a Smoothee gimbal and an eight-dollar app called FiLMIC Pro.

As bloggers rose to fame in the late 2000s, they increasingly brought video into their feeds. In 2005, YouTube started. By 2006, Google had bought it for \$1.65 billion. The online video revolution had begun. Zoom, whose use exploded during COVID-19, taught many people it was easy to capture good-quality remote interview videos at a time when face-to-face interviews were difficult or impossible. Moreover, it is now possible to conduct webinars, classes and remote presentations using video with Zoom, MS Teams, Google Meet or similar platforms. The emerging metaverse may offer further possibilities for remote capture, editing and distribution of video.

Livestreaming, already a massive industry in Asia, is becoming another popular possibility in the rest of the world, especially for video podcasters, bloggers and influencers. For instance, food bloggers can upload ‘food porn’ images as well as evaluate the meal as it is consumed (Kozinets et al., 2017). ‘Mukbangers’ who eat for others’ vicarious enjoyment and entertainment are popular food influencers (Kozinets et al., 2023, 67–9). Drone footage provides another new technology researchers might incorporate into consumer behavior footage, both as a way of gaining another perspective on a place or outdoor activity, and as a way of gaining unobtrusive data. It’s crucial to have ethical guidelines for such surveillance techniques that institutional research boards approve of, and to then strictly adhere to these guidelines.

In an important turn, Cavusoglu and Belk (2023) were able to use participants’ social media uploads with their permission. The project involves people with facial differences, and the video would have been quite constrained and would very likely have been much less effective without showing their faces – the focal point of the film. They also responded to open questions from the researchers during their self-filming. By not only getting participant approval but also having facially different participants shoot additional videos of themselves doing certain daily tasks, this work explored new terrain in the use of consumer research videography. Without social media, recruitment would have been much more difficult, perhaps impossible. Social

media had provided a forum for facially-different people who were already comfortable being on video and wanted to reach out to the world. That offered an outstanding resource for Lena and Russ's work. Moreover, the video was truly co-created between participants and researchers. Because of the video's potential to educate others, participants uniformly thanked the videographers for the video they helped create. Co-creation is nothing new (Belk, 2014/2017), but it worked quite well in this case. We have more to say about this project below, but we note for now that video collaboration with physically or mentally disadvantaged groups can be a highly effective means of empowering them (Kaley et al., 2019).

Because of the ubiquity of smartphones and their increasing videographic ease of use, several innovative applications have emerged in qualitative consumer and marketing research. For example, researchers can ask research participants to use their phones to capture live action, respond to interactive researcher requests for still shots or video, or do remote collages on certain themes using image searches, inserted text and image manipulation in familiar apps like PowerPoint or Word. The collages are then emailed to the researchers or put in a designated Dropbox folder, so the researchers can then interrogate the participants about their visual constructions. We have come a long way from cutting and pasting collages on poster-board, as the ZMET chapter of this volume by Robin Coulter shows.

Another technology that has reached its inflection point in accessibility and usefulness for videographic consumer researchers is mobile ethnography. Utilized and developed as part of netnography (Kozinets, 2020), mobile ethnography can serve as a free-standing technique and also be incorporated into videography. It involves the use of mobile or smartphone technology as a qualitative research tool to interview and study consumers, their interactions and their experiences. Now accessible to consumer researchers through platforms such as DScout and Indeemo, mobile ethnography capitalizes on the ubiquity of smartphones and other mobile devices to collect real-time, in-context data from participants, providing heretofore unprecedented research access (Ladner, 2014). Interviews, even videographic ones, usually involve asking participants to recount their experiences retrospectively. Mobile ethnography, on the other hand, allows researchers to ask participants to share and reflect upon their experiences and behaviors as they unfold in real-time, enhancing the detail, vividness, accuracy and richness of the data (Muskat et al., 2013).

The DScout platform, for example, is an online platform designed to be used with participants' smartphones. Its research functions are organized around providing research participants (the company calls its panel of participants 'Scouts') with a series of 'missions' that can last a week or more. Those missions can include activities such as: asking them to stop what they are doing every time they think about sports and to record a short video segment about it, providing a video showing where they keep their books at home and at work, or taking out any childhood toys at home and talking about why they kept them and what they mean to them, while showing them on camera. As these examples demonstrate, the naturalistic settings mobile ethnography access provides huge advantages because the research can take place in (any) context. And the extended engagement means participants are involved in the research project in an ongoing fashion.

The mobile ethnographic method allows access to consumer behavior in the participant's natural environment, reducing the observer effect common in traditional qualitative research methods (Bernard, 2011), and creating a video record at the same time. DScout's platform manages the process of completing the various missions set up for participants. Video tasks can be interspersed with open- and closed-ended questions, or requests to take still photo-

graphs. The platform collects all the data and provides it to the researcher for download and analysis, and the video recordings are already transcribed and fully searchable. Later in this chapter, we will provide some details about how mobile ethnography was used for a qualitative research project and how it resulted in a videographic research presentation shot in its entirety by research participants.

But our chapter is not going to focus exclusively on such emerging technological affordances. Instead, as we near the twenty-fifth anniversary of the ACR film festival and pass the thirty-fifth anniversary of consumer behavior videos, it is time to attempt a broader interpretation of the role of video in qualitative marketing research.

## WHAT CAN VIDEO DO IN CONSUMER RESEARCH?

To pursue this question, we need to address some basic philosophical assumptions, and also address the role of video in consumer research. First, we must consider ontology, epistemology and axiology and their relevance for consumer videography. In simple terms we expand upon below, *ontology* is about what truth claims the researcher can make about the subject matter, and what is real. *Epistemology* is about how knowledge can be acquired and produced. *Axiology* is a part of value theory, specifically asking what is good or bad (morals, ethics) and what is good taste (aesthetics, beauty).

### **Ontology**

There is a current desire in most consumer videography to go beyond a realist documentary film-making style that assumes the video lens and editing practice present a factual view of reality. For example, can we consider what a videography of rag-pickers in Mumbai who are gathering and sorting rags tells us about their social reality (Belk, 2011)? Is it actually a way to learn something about what it is like to be poor in India? Or does it present a certain perspective on the activities of the poor in India, and tell us as much about the representer and representation as it does about the reality that is represented? Astute and self-aware consumer videographers are more apt to take a relativistic ontological point of view towards such questions and assume there are multiple realities depending on whom they talk to and observe, and whom and what they choose to capture, edit and present.

In most consumer videography, reality is held to differ across time, space and people; a perspective called relativism or bounded relativism (Moon and Blackman, 2017). Unlike an experimenter, the videographer is presenting a particular reality – and sometimes multiple, contrasting realities. Generalizations about Truth with a capital T are rejected in favor of multiple truths. Even a feminist perspective is likely to find multiple equally valid truths with which to tell the story of, say, a training program that appears to be sexist in its assumptions about who can do what.

For example, Rokka et al. (2018, 429) introduce what they call ‘the ontology of movement’ to describe our composite use of the moving image in place of non-digital mediated life. Kawaf (2019, 169) employs this ontology of the moving image to introduce what she calls ‘screencasting videography’. Screencasting captures all of a consumer’s computer or mobile device screen images over a period of time. The idea is that since video and consumer screen activity are both about sequences, extensions and jumps in what the consumer is watching and

listening to on digital devices, researchers interested in consumer screen activity can use video recordings of these screens and sounds for a more complete record of natural digital video consumption and production.

In screencasting, we see the influence of an ontology (the moving image) to underwrite a particular epistemology (gaining knowledge through a more complete continuous capture of consumer screen activity). As an example of how complex this activity can become, let's consider in some depth the following reflection of the complex consumption reality of the first author, who has been awake for an hour as he writes this in a Google Doc shared with the second author. In that hour, over cinnamon toast and coffee, he checked his email and bank accounts, and skimmed news feeds from the *New York Times*, the *Wall Street Journal*, the BBC, and the *Globe and Mail* (Canadian). He also checked the day's weather and hourly forecast, as he will go for a bike ride when it gets light. He then turned to this paper, which was roughed out in draft form. At present, in addition to the Google Doc, he has eight open documents on his Safari browser, one Excel document (highlighting the status of chapters for the current book), seven Word documents, and four Adobe pdf documents. All the open windows except three of the Word documents concern this project. Two of the remaining Word documents are for two other writing projects with two different co-authors (one for each project), while the third is a rough outline for a speech in France in a couple of weeks. All of these projects except the Safari documents and Excel file were also open when he went to bed last night. He has also completed several internet searches to cite references. The news feeds and bank account screens were on his iPhone, while the weather was on his smart watch, and the rest were on his 24-inch computer screen. He is using two keyboards – one larger with tactile keys, and one smaller with a fingerprint identification key.

If all this information, communication and activity is captured with screencast technology, the reader can imagine the difficulty of making sense of it. A researcher trying to do so might be aided by using the record to autodrive (or visually elicit; Heisley and Levy, 1991). But that would potentially take another hour of his time, so presenting just a summary to him is more realistic. But now we are getting further into epistemology. And in fairness to Kawaf, she suggests using screencasting for discrete activities like shopping or game-playing rather than a typical academic's multitasking day. Nonetheless, this is the lived reality for many consumers – multiple screens, each with a large variety of platforms and images, moving and still. If we are to be thorough in our job of understanding consumers, this is the new reality consumer research must deal with and capture.

## **Epistemology**

Epistemologically, most consumer videographers employ social constructivism (the idea that meaning is co-created by people and objects) or subjectivism (the notion that humans impose meanings onto objects). Few believe meaning inheres in objects and that research can therefore be objective. Many would claim working within the domain of consumer culture theory (Arnould and Thompson, 2005) and embrace the objectives of understanding rather than predicting or controlling consumer behavior. Most consumer videographers follow some form of interpretivism, based on the premise that understanding must be 'culturally derived and historically situated' (Moon and Blackman, 2017).

As an alternative or in addition to seeking understanding, some consumer videography attempts to advocate for a particular point of view and action. For example, the aforemen-

tioned video by Cavusoglu and Belk (2023) advocates for facial equality, public awareness and an end to face-ism. Videography can be a powerful tool for giving voice to marginalized people (such as those with facial differences) especially when it is part of participatory action research where those researched are a part of the video creation (Haw, 2008). Another alternative goal rooted in the perspectives of poststructuralism and postmodernism is to deconstruct existing taken-for-granted knowledge. Other potential goals are salient as well, as we discuss in a later section on the role of the researcher in qualitative videography.

In videography, visuals can represent many layers of meaning that may otherwise be lost in a conversation, social media log or piece of historical literature. Cultural research must deal with the world's many variables and constructs, and limit itself to a small subset to include in the research report. If the adage that a picture is worth a thousand words is true, then visual research can perhaps offer a more comprehensive treatment of the complexity of reality. There are things that are difficult to express in words. For many people, including those with social anxiety or intellectual disabilities, visual and videographic methods may be among the best ways for them to represent themselves and tell their own stories (Kaley et al., 2019). Moreover, with videography created by or co-created with participants, researchers enjoy opportunities to notice not only what those behind the camera place at the center of their attention, but also the context and oftentimes what is in the periphery of their focus (as in background shots, or even subconscious blips that may mimic eye tracking; Hartman et al., 2011).

Much more than the camera, the researcher is the primary instrument in qualitative videography, and because of this fact, training in videography is useful. Understanding how to shoot and cut video is important, but so is understanding the philosophical bases of qualitative research, as we provide here. Interview techniques are also critical, difficult to learn and hard to put into practice in videographic contexts – and they are often exposed by the camera.

Depending on research orientation, the researcher may emphasize the emic meanings of objects to the participants, the etic semiotic meaning of the objects the researcher brings to bear in the interpretation of what is happening, or some combination of the two. Emic meanings are critical to the sort of participatory action research (PAR) noted above. Wang and Burris (1997) originally conceived of a technique they labeled 'Photovoice' for engaging participants in co-constructing their still-photo representations. The method has since been adapted and expanded to include participant-produced video (Hartman et al., 2011). This was also the case with the PAR research by Cavusoglu and Belk (2023).

## Axiology

Axiology involves value: what is good and what is bad. It is most commonly the consumer videographer, rather than those portrayed, who chooses how to study consumers and the ways they are portrayed. Researchers are often inclined ethically to portray their research participants in a favorable or positive way. We develop relationships with our participants; we also choose which ones we are going to show, which parts of our observations or interviews with them we will include in our video, and which ones we will emphasize as part of the filmic narrative we create through the delicate art of editing. We use these raw materials to create what we hope is a coherent narrative that will impact viewers. We tend to avoid making participants appear foolish, evil or incompetent.

Ethical procedures are crucial. Since we are usually dealing with human participants – consumers or sellers – we are usually bound to have them sign informed consent forms when

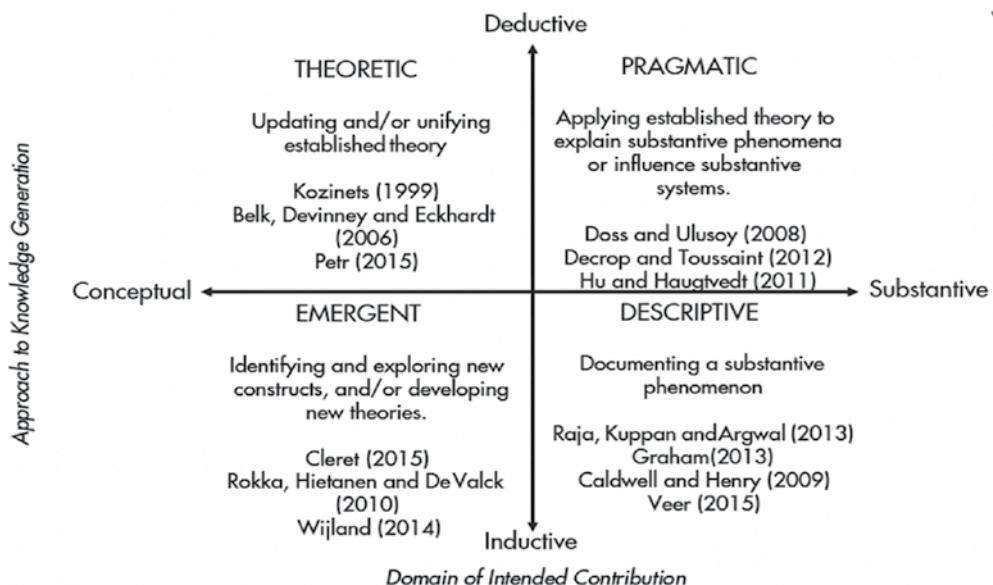
interviews are involved. With video interviews, many recorded behaviors and other material that may be provided to the videographer (e.g. scanned documents, social media posts or videos), we believe it is wise to use a two-step consent process. The initial consent is to allow the recording of the video. This step takes place before any video is captured or edited. The second consent occurs after the video material has been gathered and involves permissions to use the research in various ways, ranging from only allowing the videographer and perhaps a research team to use it, to allowing broadcasts, use on the internet, and/or use in feature films. The idea is that rather than relying on consent given before knowing exactly what will happen, this two-part process enables the subject to give permission after they know what has transpired. This right of refusal allows the participant to self-censor in the case of sensitive, embarrassing or coerced admissions or behaviors. This also enfolds participant values that may differ from those of the researcher, as in the trusted old qualitative procedure of member checking (Lincoln and Guba, 1985). We also need to consider whether our objective in the videography should be to aid understanding of the phenomenon, or whether we should be trying to help change things for the better (Ozanne and Saatcioglu, 2008).

Ontology, epistemology and axiology must go together for a given project to make sense – but they are more implicit assumptions than explicit choices. As a project unfolds, it is often important to step back and ask whose truths we are emphasizing, whether we have set the stage with attention to what Askegaard and Linnet (2011) call the context of context, and what values we are pursuing and presenting. But further to these ends, we might ask the simpler question: what sort of consumer videography are we trying to create? This question should be asked long before we upload all our ‘footage’ and start the editing process. It begins with the videographer entering or about to enter the field, although the answer may change along the way.

## YOUR ROLE AS VIDEOGRAPHER

Belk et al. (2017) offer a beginning toward developing the role of the videographer in a project. They analyzed 171 videos produced in academic consumer and marketing research that conveyed findings from a research project or portrayed conceptual endeavors. They classified the video projects along two dimensions: one from conceptual to substantive, and the other from inductive to deductive, an analysis that formed four quadrants (see Figure 34.1).

The Inductive/Substantive quadrant of *Pragmatic Videos* consists of applying inductive methods to understand or influence substantive phenomena. For instance, Decrop and Toussaint (2012) made a film about visitors to the Père-Lachaise cemetery in Paris who visit the grave of Jim Morrison of The Doors. In the Inductive/Substantive quadrant are *Descriptive Videos* documenting a substantive phenomenon. An example here is the Caldwell and Henry (2009) video about a heroic doctor working to reduce maternal and infant mortality among poor women in Pakistan. In the Inductive/Conceptual quadrant of *Emergent Videos* are projects that identify and explore new constructs or develop new theories. For example, Rokka et al. (2010) present a video that shows a paintball championship match in which the ‘hero’s’ loyalty to his team is contrasted with his individual desire to win. With regard to the Deductive/Conceptual quadrant, labeled *Theoretic Video*, Belk et al. (2017) suggest those that involve updating or unifying established theory belong here. An example is a video by Christine Petr (2015) that examines how non-knowledgeable visitors to contemporary art museums experience challenging pieces in four different art installations. Building on Holbrook and Hirschman’s (1982)



Source: After Belk et al., 2017.

Figure 34.1 Four ways videography contributes to marketing knowledge

classic piece on feelings, fantasies and fun, they chose to understand the experiences of a set of non-expert visitors, and explored the salience of Holbrook and Hirschman's conceptualization of hedonic consumption for those consumers.

But the classification in Figure 34.1 does not exhaust the possibilities for consumer videography. A number of scholars have emphasized the differences between written text and video (e.g. Hartman et al., 2011; Kaley et al., 2019; Rokka et al., 2017). Video can capture behavior in all its visual and aural complexity. It can convey information from illiterate and preliterate people, and those same people can consume it. It can strive to be artistic instead of scientific. It can convey detail, including nonverbal expressions and 'incidental' background items. It can use music, inter-titles, cinematic techniques and bodily movement to alter moods and emotions.

In mid-2023, Rob, along with Ulrike Gretzel and Lena Cavusoglu, used the mobile ethnography platform DScout to investigate the new media habits of Generation-Z consumers. Working with USC Annenberg's Center for Public Relations and the Day One agency, they recruited participants and designed a series of missions that asked them to record and then reflect on what content they considered to be news, what content informed them, what entertained them, what they liked to share and so on. As well, they asked participants to use their smartphones to record the content they consumed first thing in the morning and at other times. This investigation would reside at the bottom of Figure 34.1's quadrant because it both documented a new and dimly understood phenomenon (Gen-Z's specific media content consumption habits), and also sought to identify patterns in that data and theoretically explain them. As such, it was both descriptive and emergent.

The results were very different from the reflexive content consumption practices Russ shared in his morning screen reflections above! The Gen-Z participants revealed they need content constantly to be entertained. They skim through it very quickly (lots of memes and joking material), are susceptible to media influences/influencers, scroll for hours and watch a wide variety of video content from various platforms and populations (a lot of it on TikTok and Instagram). To them, news is news right after it drops, for about 10 minutes, when it's truly fresh and new. After that, it's just another piece of old content. To illustrate one of our findings, we edited together a short video showing our participants talking about the first thing they did in the morning: 'I woke up and checked my TikTok.' 'First thing I did was check my "for you" on TikTok.' 'For you was the first thing.' Person after person began telling the same story about TikTok in their own language, albeit worded slightly differently. The video was powerful because it illustrated an important point many of us knew, but few of us truly fully understood: Gen-Z's media habits are truly very different from those of their parents. Other videos showed them consuming media content and narrating what they were viewing, what they thought of it and why they were viewing it. The video provided a rich sense of being there, looking over their shoulder while they engaged in a rapidly paced and complex activity that required additional explanation (and pause and rewind buttons) to be coherent. With careful editing, the video was able to provide that theoretical explanation.

Returning to the study by Cavusoglu and Belk (2023), we encountered some initial difficulties. We met with a half-dozen promising NGO groups at the start to discuss our project and ultimately seek their help in recruiting participants. We received valuable input, consulted several facial-difference experts and modified our orientation and vocabulary. For example, rather than 'facial disfigurement', we learned that 'facial difference' (FD) was the preferred term. We found recommended literature and made further changes. While some of these organizations promised recruiting help, ultimately none came through. So, we turned to blogs and videos posted by facially different people, reaching out to them with interview requests. In this case, after some email exchanges, the majority were willing to help. We obtained the necessary human subject approval from our universities and began interviewing.

The interviews were truly amazing. Most had come to terms with their appearance and were trying to help others whom they had found online or through FD NGOs. They suggested others to interview. We realized that sampling only those who had been involved in blogging and other forms of social media activism might exaggerate the extent of self-acceptance among this group. So, the last half of our interviews focused on people without an active social presence.

As we began to rough out ideas for our video, we realized there was a wealth of self-interviews and discussion of FD in our first half. Many had signed the second consent form, allowing us to use this material. Nevertheless, we checked back, explained the rough idea for the video, and secured additional permissions. We also asked that they video-record their answers to questions involving their use of makeup, what bothered them the most about their FD, and to demonstrate how they get ready in the morning. After securing all of this great material, we did a rough cut of our video and emailed a password-secured link to the participants. They were 100 percent positive, and two who live within a day's drive of the film festival's conference asked if they could come. Their generosity overwhelmed us, and we readily agreed, believing that given their collaboration and honesty, they belonged at the Q&A following the film's first showing as much or more than we did. They were warmly embraced by the audience and they in turn loved the experience and blogged about it after the conference.

## CONCLUSION: WHAT DO YOU WANT TO DO WITH VIDEOGRAPHY?

In conclusion, we structured this chapter to inform scholars about videographic work and its potential role in their research endeavors. We emphasized the significant potential of video in qualitative marketing and consumer research. We addressed the question of video's role in consumer and marketing research by: (1) providing an overview of the history of consumer videography and our engagement with it, (2) elucidating the importance of video in scientific discovery, highlighting its philosophical connections by examining video ontology, epistemology and axiology, (3) detailing the pivotal role of the videographer in data collection, analysis and communication of findings, and (4) demonstrating how video can elevate theoretical contributions and augment social and managerial impact.

As we close this chapter, consider that the basic question to be answered in videography is: What am I/are we trying to do here? One benefit a well-crafted video offers is to humanize dehumanized or marginalized subjects by showing them in some depth – speaking, acting, working and playing in everyday life. Kaley et al. (2019) accomplished this outcome by enlisting the help of people with intellectual disabilities in making a film about themselves. One especially helpful technique they employed was to film them accomplishing various tasks on a therapeutic care farm (e.g. planting and harvesting a garden). When shown to participants, the footage served as a visual elicitation technique, spurring them to think about themselves. Giving them the camera to film objects and experiences important to them was another helpful technique.

We hope we have convincingly conveyed two important points. First, video material is relatively easy to collect, but turning it into rigorous videographic research requires adhering to some important structural guidelines. That caveat should not stand in the way of researchers incorporating videography into projects; in fact, the plethora of visual and video material on media platforms means there's never been a more optimal or more important time to incorporate visual and video methods into consumer research.

Our second point is that there are many varieties of videography available to use and enjoy. From leveraging existing social media videos to having participants share their videos, to screencasting videography (Kawaf, 2019) and filming virtual-world metaverse interactions (see Yang and Chattopadhyay, this volume) in immersive netnography (Kozinets, 2023), to mobile ethnography platforms that organize missions for research participants, the affordances of social media and immersive technology platforms provide an endless series of exciting opportunities to record and utilize vivid videographic content in our research.

If our opening extension of Carpenter's electrical marvels into our current age of digital marvels has merit, the implication is that we now possess the videographic power of gods. And surely there is much more to come. To research wisely using these amazing tools, it is incumbent upon us to look critically at what we are creating for whose benefit, and with what potential impact. It seems to us we are learning to respect our participants and less powerful groups more than in the past, but perhaps less than we will in the future. Such a framework puts axiology front and center, and with a given ontological perspective, we now possess amazing tools as part of epistemologies that can empower more marginalized consumers and produce higher-quality, more impactful work. If these technologies make us godlike, then use your superpowers for good, whatever you interpret that to be.

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## 35. Flexible fieldnoting for contemporary consumer culture research

*Bernardo Figueiredo, Marcia Christina Ferreira and Daiane Scaraboto*

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### INTRODUCTION

This chapter introduces the practice of *flexible fieldnoting*, and shows how it can be performed along the six axes of flexibility. This practice has evolved in response to fieldwork that is increasingly collaborative and multisited. Traditionally, fieldnotes focus on capturing, through written records, the researchers' observations and experiences in the field. Consumer culture researchers have long used fieldnotes in ethnography (Peñaloza and Cayla, 2006), grounded theory (Goulding, 2002; Locke, 2000) and netnography (Kozinets, 2019) projects. As such, researchers are familiar with the standard procedures and guidelines, borrowed from anthropology, for writing fieldnotes and incorporating them into the analytical process. Fieldnotes take multiple formats and serve various purposes: condensed accounts or jottings (quick notes taken during fieldwork), expanded accounts (detailed notes made soon after each immersion in the field), fieldwork journal (a record of the researcher's experiences, ideas and thoughts) and analysis and interpretation notes (generalizations, insights into the culture studied, analytical possibilities) (Emerson et al., 1995; Spradley, 1980). Hence, fieldnotes are not only a type of data, but also 'a process of analysis-in-description' (Emerson et al., 1995, 106). Flexible fieldnoting contributes to this understanding by supporting researchers in becoming more responsive to the dynamic needs of the field.

Recommendations for how to write and incorporate fieldnotes into interpretive studies have evolved to incorporate changes in cultural phenomena and research practices (Lofland et al., 2022). Consumer culture has evolved over the past decades, along with technologies. As a result, consumption cultures that used to be obscure are now openly accessible to researchers across multiple online platforms. Moreover, the globalization of academic fields (Belkhir et al., 2019) has encouraged the formation of international research teams, who develop research projects from a distance or across multiple fields. Guidelines for generating and analyzing fieldnotes have evolved accordingly. For example, applied ethnographer Maria Cury (2015, 3) argues for 'moving fieldnotes from a private practice of writing alone in the field and towards a social practice that engages teams and stakeholders'. Similarly, Atkinson (2014) invites researchers to cultivate engagement with multiple technologies to produce fieldnotes, in addition to those generic skills that are clearly needed (e.g. ethnographic sensibility).

This chapter represents our effort to capture, reflect upon, and share learning from our experience of writing fieldnotes across multiple research projects in the field of consumer culture (see Table 35.1). We argue that one invaluable skill for consumer culture researchers is

flexibility in producing fieldnotes. We propose that researchers consider the level of flexibility needed for their projects based on six aspects: (1) Location, (2) Format, (3) Team, (4) Timing, (5) Interaction and (6) Archive. By doing so, researchers will be better prepared to navigate changing data collection demands in dynamic fields.

*Table 35.1 Projects using flexible fieldnoting*

Project Label	Field	References
Academic Isolation	Early career researchers' experience of isolation in globalized academic fields.	Belkhir, Meriam, Myriam Brouard, Katja H. Brunk, Marlon Dalmoro, Marcia Christina Ferreira, Bernardo Figueiredo, Aimee Dinnin Huff, Daiane Scaraboto, Olivier Sibai and Andrew N. Smith (2019), 'Isolation in Globalizing Academic Fields: A Collaborative Autoethnography of Early Career Researchers', <i>Academy of Management Learning and Education</i> , 18(2), 261–85.
Couchsurfing	Online and offline interactions among users of the shared accommodation network couchsurfing.org.	Scaraboto, Daiane and Bernardo Figueiredo (2022), 'How Orchestration Work Creates Value in the Sharing Economy', <i>Journal of Marketing</i> , 86(2), 25–44.
Circulating Holy Mary Statues	Offline circulation of Holy Mary statues among neighbors in two Brazilian cities, and online content about the practice.	Scaraboto, Daiane and Bernardo Figueiredo (2017), 'Holy Mary Goes 'Round: Using Object Circulation to Promote Hybrid Value Regimes in Alternative Economies', <i>Journal of Macromarketing</i> , 37(2), 180–92.
Makeshifting	Social practice of makeshifting (creative solutions reusing objects, parts, and materials) in Brazil, and its online sharing.	Ferreira, Marcia Christina, Daiane Scaraboto, Adriana Schneider Dallolio, Bernardo Figueiredo and Eliane Zamith Brito (2020), 'Disruptive Consumption: How Consumers Challenge Mainstream Markets Through Makeshifting', in Jennifer Argo, Tina M. Lowrey and Hope Jensen Schau (eds), <i>NA – Advances in Consumer Research</i> , Volume 48, Duluth, MN: Association for Consumer Research, 331–2.
Melissa Collectors	Online content and online-offline communities of Melissa shoes collectors.	Ferreira, Marcia Christina and Daiane Scaraboto (2016), 'My Plastic Dreams: Towards an Extended Understanding of Materiality and the Shaping of Consumer Identities', <i>Journal of Business Research</i> , 69(1), 191–207.
Travel Bugs	Online and offline interactions about circulating trackable items among participants in the hobby of Geocaching.	Figueiredo, Bernardo and Daiane Scaraboto (2016), 'The Systemic Creation of Value through Circulation in Collaborative Consumer Networks', <i>Journal of Consumer Research</i> , 43(4), 509–33.
		Scaraboto, Daiane and Bernardo Figueiredo (2015), 'How to Create Value via Object Circulation in Gift Systems', in <i>Ethnographic Praxis in Industry Conference Proceedings</i> , 2015(1), 235–53.

We structure our approach to producing fieldnotes across six axes of flexibility (see Figure 35.1). Each axis has two anchors representing contrasting qualities of the same aspect, with each aspect varying according to fieldwork needs. Collectively, these axes address the what, when, where, how and why of producing fieldnotes.

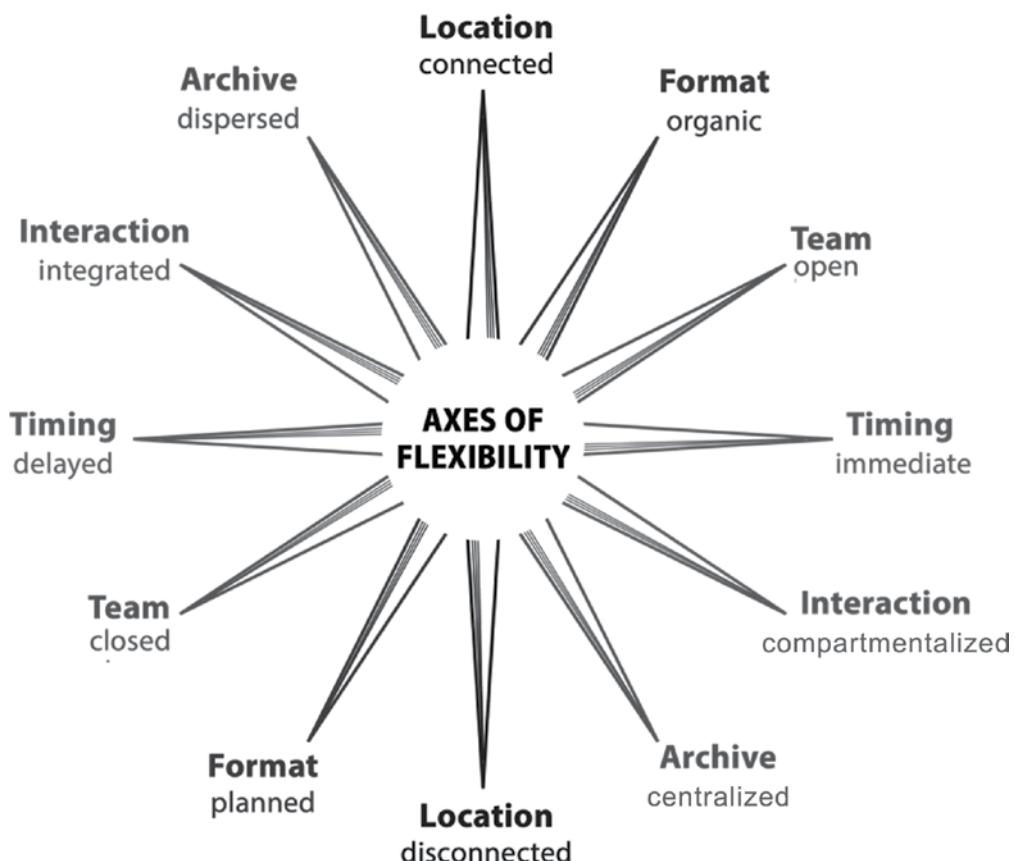


Figure 35.1 *Fieldnoting axes of flexibility*

We conceptualize *flexible fieldnoting* as the practice of conducting fieldwork in contemporary consumer cultures in ways that can dynamically capture cultural aspects of the field as well as the researchers' reflexivity regarding these aspects. As a practice, flexible fieldnoting is performed differently in each project, according to the changing demands of data collection in dynamic fields. By reflecting upon these axes of flexibility at the onset of a project, ethnographers can set the intention to produce field notes in flexible ways. This approach produces rich fieldnotes that keep track of complex fields and their evolution, across the duration of research projects. It allows researchers to generate collective and immersive fieldnotes, even when working across multiple sites and time zones. The flexibility axes can also help Grounded

Theory researchers whose earlier fieldnotes will later become essential to the constant comparison process (Glaser and Strauss, 1967).

## AXES OF FLEXIBILITY

Aligned with traditional approaches to writing fieldnotes, we see fieldnotes as a combination of selective description and research. As Emerson and colleagues note, fieldnotes writing ‘is both intuitive, reflecting the ethnographer’s changing sense of what might possibly be made interesting or important to future readers, and empathetic, reflecting the ethnographer’s sense of what is interesting or important to the people he is observing’ (Emerson et al., 1995, 11). As we introduce the axes of flexibility, we also leave room for fieldnoting to be flexible in that regard: in some cases, fieldnotes will be descriptive (e.g. offering details of spaces, recounting events), while in others they will be reflexive (e.g. focused on the researcher’s experience of watching a video). We describe each of the axes of flexibility below.

### **Location: Connected Versus Disconnected**

Contemporary consumer culture research often includes both online and offline aspects. Offline, researchers can stay at their fieldwork location to write fieldnotes or retreat to a separate location (e.g. a hotel, their offices; Clifford, 1990). This approach of keeping fieldnotes close to the data also keeps the data close to the researchers. For example, when only one researcher is on site, other members of the team can keep connected to the field through engaging with reflections and observations produced by the researcher who is conducting fieldwork.

Flexibility of location is particularly relevant for the online components of research projects. Online fieldnotes can often be captured through the same platforms where the phenomenon is unfolding, with researchers choosing to be connected to the location where the phenomenon occurs. For example, in projects where multiple social media platforms are involved, multiple researchers can connect their accounts (e.g. ‘following’ or ‘friending’ each other) to register their observations and reflections through private messages on each platform, thereby writing fieldnotes at the same location as the data is collected.

Keeping fieldwork and fieldnoting connected in the same place helps keep the data in its original format, with the researchers’ notes attached to it. For evolving data, such as ongoing comment threads on online platforms, live links shared by private messages on a platform allow researchers to immediately revisit the data to check the data for changes, before responding to fieldnote prompts made by a collaborator.

For example, in a study of Melissa shoe collectors, Christina saw a Facebook post featuring a collector with whom the researchers were not familiar. In the post, an image showed the collector posing in front of shelves containing hundreds of pairs of plastic shoes. Immediately upon seeing it, Christina shared the post with Daiane through Facebook Messenger. When Daiane clicked on the link a few hours later, the post already had 500 comments, and she made a note of that surprising engagement when replying to Christina’s Facebook message. Daiane’s observation prompted Christina to add this collector to the sample of those they were following online and keep an eye on whether the consumer would migrate from collector to influencer. This flexible fieldnoting allowed the researchers to extend their sampling and keep track of a new influencer as soon as she emerged.

Similarly, when Melissa collectors started doing ‘lives’ on Instagram, Christina and Daiane exchanged fieldnotes about the ‘lives’ on the same platform, leveraging its affordances. An exception to this was YouTube, which did not offer a viewer-to-viewer messaging solution. When making notes about videos posted by collectors on YouTube, Christina and Daiane often resorted to other platforms (e.g. WhatsApp) or email, sharing links to the YouTube videos that they were discussing. This flexibility of producing fieldnotes across multiple locations facilitates immediate reflexivity and increases researcher engagement with the same tools that shape the experiences of those consumers being studied. Although this method simplifies fieldnote capture, it requires additional effort to retrieve, organize and systematize these fieldnotes; however, there are ways to manage this (see section on archiving).

An additional advantage of fieldnoting across locations is that researchers can compare their observations of content in each location. In online research, for example, what one sees on a given platform depends on algorithms (Airoldi and Rokka, 2022; Scaraboto and Ferreira, 2022) and one’s browsing history and patterns. As such, having more than one researcher capturing data and sharing their observations in the same location allows for richer fieldnotes that capture cultural aspects of the field from multiple perspectives. However, co-location of data and fieldnotes is not always possible or desirable: there are projects that demand centralization of data for security reasons, or when the researchers collecting the data differ from the ones analyzing it. In such cases, fieldnoting might require flexibility from the researchers to write their notes in a secure and centralized platform, not co-located with the field.

### **Format: Organic Versus Planned**

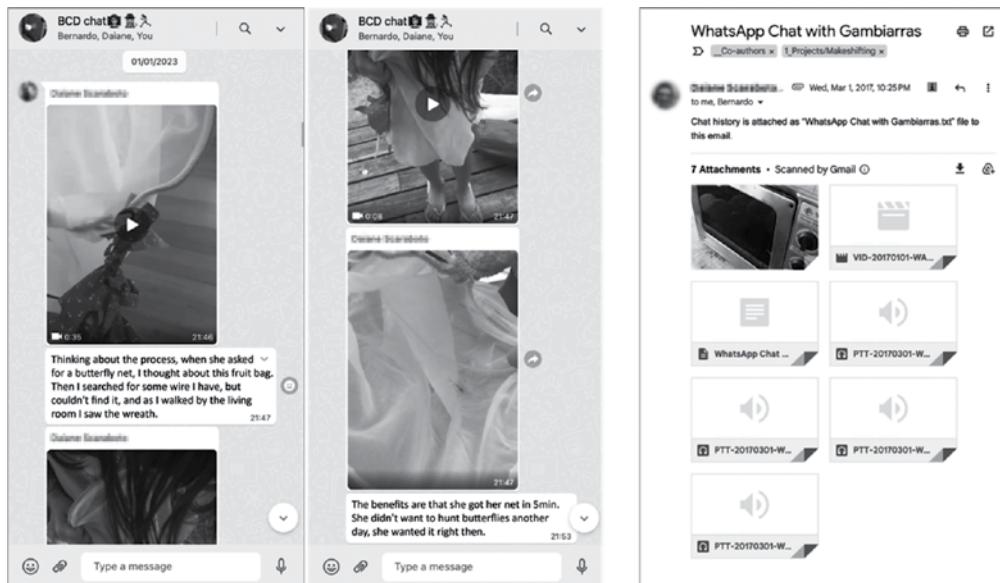
The popularity of smartphones and other technologies has transformed fieldwork practices (Sanjek and Tratner, 2016), allowing researchers to easily create and share notes with their research teams in a variety of formats. Moreover, some research projects will, by nature, encourage researchers to work with an ensemble of fieldnotes formats.

Our research on makeshifting observes how consumers design and create their own goods by (re)using materials, parts or objects at hand. These consumers share step-by-step textual, visual and audio-visual explanations of their makeshifts through an array of social media platforms. To better capture the richness of this dataset, our fieldnotes also employ a variety of formats. A makeshift video hyperlink is complemented by a textual note sent to the team. Similarly, a voice message is coupled with a photo taken of a makeshift spotted in real life. Combined, these extended accounts enrich the researchers’ immersion in the field.

Format variety also enables deep and encompassing notes about participant observation. Inspired by observations in the field regarding making and recording makeshift playful toys, Daiane recorded videos, took photos and wrote about her experience of creating her own makeshift butterfly nets with her daughter. The spontaneous creation, which was driven by the need to find ways to play in a different context, prompted Daiane’s reflection on the improvised aspects of makeshifting (see Figure 35.2; left). Christina opted for a purposive participant observation. Christina was fascinated by a video featured on her Facebook feed that demonstrated how to create a barbecue blower using plastic bottles. She decided to replicate the makeshift, but it took her three attempts to get it right. Her trials and tribulations were shared during an online meeting for collective reflections on the practical aspects of makeshifting.

Multiformat ensembles can emerge organically following the researchers’ reflexive process when a note or prompt sent in one format generates responses in other formats. For example,

a textual note could elicit responses from collaborators in voice messages, images and even videos. Christina's note, saved as a draft in her mailbox, prompted Daiane to sketch a possible framework, which she shared via an online document. Following that exchange, Christina left a voice message for the group documenting their discussion. This prompted Bernardo to start a reflexive discussion about the emerging ideas. The voice messages and text interactions proved so fruitful that they were all compiled and shared via email, thereby formalizing the collective fieldnoting process (see Figure 35.2, right). However, the organic approach offers less control over chosen formats requiring tools that support this flexibility.



*Figure 35.2 Organic fieldnoting: participant observation (left) and format ensemble (right)*

Navigating formats can also be planned. During fieldwork for the project on Circulating Holy Mary Statues in Brazil, Daiane planned a trip to conduct fieldwork within Catholic groups in Brazil. She agreed to send WhatsApp messages with comments, photos and audios to Bernardo whenever something interesting happened. The arrangement provided Daiane with maximum flexibility while allowing Bernardo to participate in the fieldnoting process remotely.

Control over data generation processes directly influences the choice between the planned and organic fieldnote formats. When researchers wish to standardize data generation processes, opting for planned fieldnote formats guarantees consistency and avoids oversights. Conversely, projects that favor participants' ability to generate data in multiple formats often adopt the organic approach because this allows for capturing spontaneity during fieldwork. Although an organic approach to fieldnote formats will later require consolidation, it is worthwhile because it can entice serendipitous moments that will improve fieldwork and expand research possibilities.

### **Team: Closed Versus Open**

When working in teams, researchers might need to produce fieldnotes that are more closed or more open. Closed fieldnotes are shared only with the researchers involved in the group. In our research group, ‘The Scrutinizers’, we engaged in a collaborative autoethnography to understand academic isolation among early career researchers. We generated data about group members’ experienced isolation, actions, behaviors and feelings through multiple rounds of introspections. Our written self-reflective data were continuously enriched and expanded through individual and group observations and notes made on the introspection files, as well as during group discussions via a digital communication platform, an online document editor and email threads where we discussed our individual experiences of academic isolation and attempts at mitigation.

This project offers a good illustration of how fieldnotes can be enriched when multiple researchers collaborate in fieldnoting by reading one another’s fieldnotes and adding to them. For example, consider an introspective note shared by one group member:

But there were many others on the same boat, so I did not feel socially isolated at all. Quite the opposite. I formed some bonds with people, and I carried them for life [...]. So, somehow the social bonds were created by a sense of being on the learning/entrant boat at the same time.

In reading that note, another group member made a note of their own (as a comment in the online document editor containing all introspections):

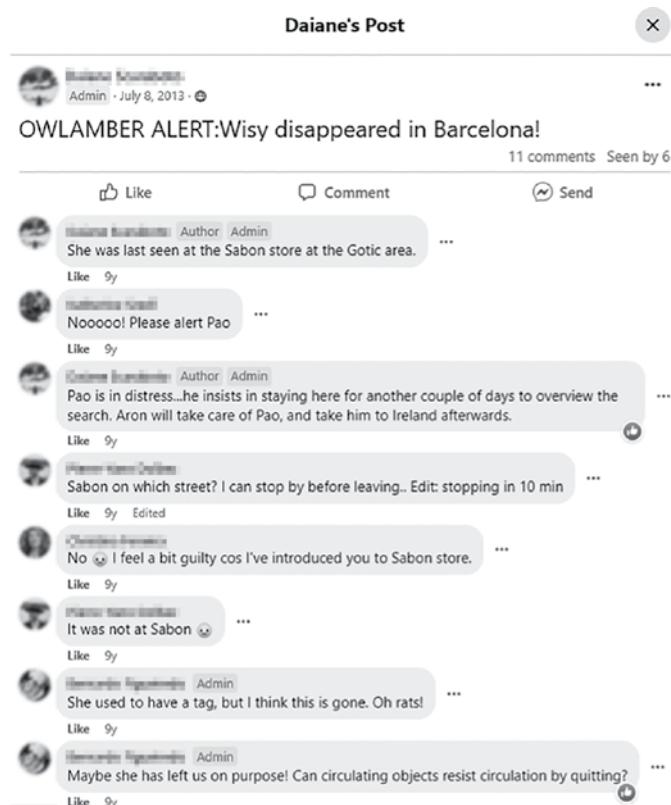
This is interesting for me because the social bonds need to be exercised and maintained, and I want to know what else is behind the maintenance of bonds.

Prompted by such exchanges, the group discussed directions for analyzing the data produced. Given the collaborative autoethnographic character of this project, it made sense to keep fieldnotes private to the team.

In contrast, in online research, participant observation can be done and captured publicly through open fieldnotes shared on the researchers’ social media pages. This means that fieldnotes are produced beyond the boundaries of the research team, as the researchers welcome field observations and reflections shared by non-researchers. This makes fieldwork observation and interpretation more porous, allowing researchers’ interpretations to be endorsed or disputed by the communities. For example, in their experiment of object circulation for the Travel Bugs project, Bernardo and Daiane openly shared multiple posts on Facebook about their experiences with travelling objects circulated among academic friends. Facebook friends of the researchers who were also involved in circulating the objects commented on these posts, prompted further reflection about those experiences, and participated in the culture along with the researchers, suggesting additional layers of cultural understanding to the phenomenon (see Figure 35.3). Open fieldnotes make sense when the interpretation and sensemaking process requires help from the wider community.

### **Timing: Immediate Versus Delayed**

Flexible fieldnotes attend to the timing of note taking, inviting researchers to leverage their direct interaction with online and offline aspects of the field. Immediate fieldnotes help



*Figure 35.3 Example of open team fieldnoting*

capture and share first impressions, raw moments of emotion and uncertainty, confusion and indeterminacy, as they emerge in the field. Delayed fieldnoting might be a contingency (e.g. a researcher participating in scuba diving practices cannot register her experience straight away), a desirable aspect (e.g. to create more time for reflection) or a complementarity strategy (e.g. to contrast immediate versus delayed emotions).

For example, during the Couchsurfing project, Bernardo arranged for a couchsurfer to host him in Belgium. This couchsurfer's profile was quite unusual, stating that people should remain naked while staying in his apartment. The host was forthright about this, and there were other eccentricities on his profile and webpage, which made Bernardo feel that the situation was risky. However, the host had previously received more than 500 other couchsurfers and had very positive evaluations, which made him an important informant. Bernardo decided to stay at the host's apartment, but during the entire experience, he kept an open WhatsApp chat with Daiane, so he could share text and voice messages, and she could check in about his safety. The posts capture both descriptive aspects of the place and Bernardo's anxiety and excitement about meeting this host, including his wondering of whether previous guests might have felt the same, and his surprise and amazement when finding other guests in the naturist's house. Messages also described some aspects of the experience that put Bernardo at ease, such as the host cooking dinner for his guests and offering Belgian beer, and others that made him

uncomfortable, such as doorless rooms and a set of rules about when and how to go nude in the house. These notes allowed Daiane to ask about specific aspects of the field ('Is there a bathroom door?'), which prompted Bernardo to probe the field further. From a distance, Daiane was also able to help by sharing practical ways of dealing with fieldwork uncertainties, risks, and dangers (e.g. Kovats-Bernat, 2002; Sluka, 2012).

The ability to incorporate immediate feelings, sensations and thoughts as they unfolded was important. Bernardo's experience kept changing and what seemed strange in one moment was perceived as safe in the next. Then something else would happen that would make him feel uncomfortable or out-of-place again. This constant need to recalibrate the experience to manage the unexpected was captured as experience co-creation and the need for consumer orchestration, two central concepts in the paper that emerged from this fieldwork.

While more immediate fieldnotes capture the emotional rollercoaster journey and the indeterminacy of fieldwork, the delayed ones capture a more distanced take on the field, when researchers can comment on what they experienced with an eye on the bigger context in which the observation might fit. Bernardo's more immediate fieldnotes complemented the delayed reflections, made at the end of the day and at the end of the trip. Thus, Bernardo's delayed fieldnotes registered how the tensions from the morning had reduced and describe how this experience compared to his other couchsurfing stays. Whether flexible fieldnotes are immediate or delayed, being attentive to the temporal aspects of note taking helps researchers adapt to the context and demands of fieldwork.

### **Interaction: Compartmentalized Versus Integrated**

Flexible fieldnoting is a practice that builds on researchers' interactivity. Whether this interactivity is more compartmentalized (e.g. in scheduled periodic meetings) or more integrated (e.g. spontaneously, across multiple platforms), flexible fieldnoting supports an iterative process of moving seamlessly from observation to interpretation to theorization.

During the Travel Bugs project, for example, Daiane and Bernardo followed, online and offline, objects that the players of the game Geocaching moved around. The distributed nature of the fieldwork required the researchers to be in constant contact with each other, to share their experiences of encountering these objects. They shared, for example, screenshots of the online profiles of Travel Bugs that they thought were interesting to follow and shared notes about what they thought was interesting about a particular profile. The researchers were considering using theories of gift-systems and the Kula ring, so they decided to circulate plush toys as a way of sensitizing themselves to the role of circulating objects in social networks.

Much like Travel Bugs, the circulating objects launched by Daiane and Bernardo had instructions tags and online profiles (on Facebook). As the objects were carried from place to place by academic friends, one of the tags got wet. Sharing this information sensitized the researchers to the precariousness of some of these objects and made them note that geocachers often had issues with Travel Bugs getting damaged during circulation. When this incident happened, the researchers exchanged notes, discussing what to do. Eventually, Daiane laminated the toy's tag, photographed it and shared it with Bernardo. The picture generated further comments, as Bernardo questioned whether this was an instance of 'protecting' or 'preparing' the circulating object (see Figure 35.4). These were two preliminary conceptual categories that the researchers had identified as they tried to classify other similar practices in the field. But until then, the categories had never seemed to overlap. In this case, the researchers' flexible field-

notes about participant observation in object circulation allowed them to collectively reflect about the nature of these two practices and further separate one from the other.

The example above highlights how the interactive nature of flexible fieldnotes helps researchers become more attentive to the field, work in a distributed manner, share ongoing impressions and better theorize the field in the process. This process can be integrated, as in the example above, where one researcher's fieldnotes prompt others to observe, focus and reflect more. However, for interdependent sub-projects within a larger project, projects with external research assistants or projects carried out in multiple sites by separate teams, the interaction needs to be compartmentalized. In this case, fieldnotes do not become integrated straight away but might build upon each other sequentially, or through side conversations between researchers across teams. To preserve interactivity, it might be useful to designate representatives to exchange notes across teams and see how synergies across fieldnotes can be leveraged.



*Figure 35.4 Example of integrated interaction fieldnoting*

### Archive: Dispersed Versus Centralized

Methodological decisions about what locations to observe and note formats to use will guide the process of developing the fieldnotes archive. Archiving can be a dispersed process when multiple locations are being observed, such as in the first phase of Christina and Daiane's research on Melissa shoes collectors. The need to keep the data in its original format led

to their decision to annotate directly where the online interactions were happening. When platform limitations required so (i.e. YouTube), annotations moved to an instant messaging application where a technological resource (i.e. hyperlinks) was employed to facilitate data retrieval. As such, the fieldnotes archive was spread across several locations.

It is also possible to centralize fieldnotes archives. Informants from our research on make-shifting generated data in a variety of formats and shared it in person – during interviews, workshops and home tours – and online through blogs, forums and social media platforms. While fieldnoting in multiple formats proved fruitful, cross-platform annotation would be impractical due to the breadth of outlets and technological limitations. Hence the decision to adopt an instant messaging application to centralize the research team's fieldnotes.

Technological resources can provide a middle ground between decentralized and centralized approaches. To capture the dynamics that unfold when Melissa shoes consumers are on their way towards becoming (or ceasing to be) fully devoted collectors, the research team decided to conduct a one-year intensive online fieldwork observation. Hence, the Slack platform was linked to Zapier – a web application that automates workflows across platforms – to capture the researchers' real-time interactions with informants on selected social media platforms. The primary data source was Instagram, complemented with Facebook and Twitter data to increase understanding of informants' actions across platforms. The Slack thread feature was used as a collective fieldnoting tool, and channels were also created for researcher's individual reflections. Combined insightful threads and reflections would feed into the general channel, allocated to analysis and interpretation notes (see Figure 35.5). These tailor-made platform integrations offered multi-level interaction between data and fieldnoting. This allowed the researchers to strike a balance between decentralized and centralized approaches to capturing, retrieving, organizing and systematizing fieldnotes.

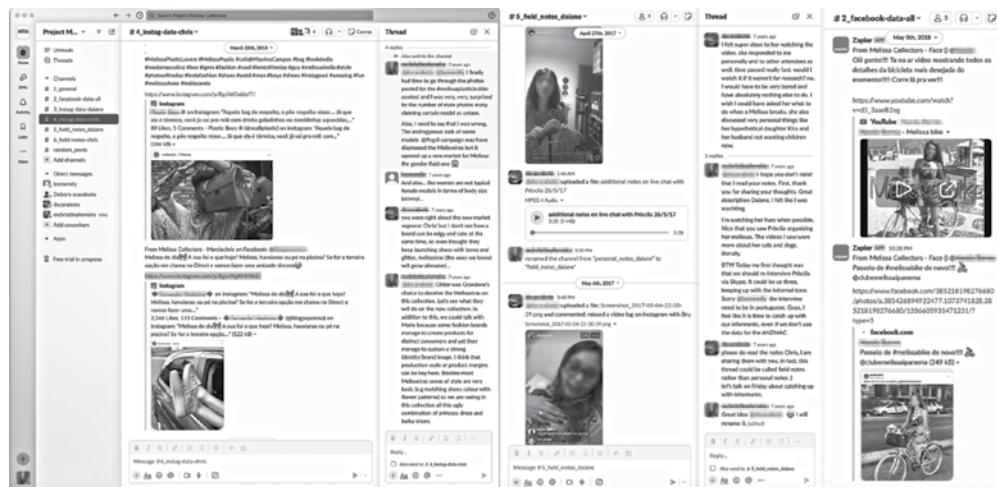


Figure 35.5 Archive: automated platform integration examples

Flexible fieldnoting can also be managed within qualitative data analysis software (QDAS). Software such as Atlas T.I., nVivo and MaxQDA are known for their ability to aggregate data in multiple formats. Their most recent releases include cloud-based collaborative annotation tools that improve team collaboration while facilitating data retrieval. In addition to Slack, other business communication platforms like Microsoft Teams and Mattermost (an open-source alternative) can also be used for archiving fieldnotes. Beyond note-taking applications (e.g. Evernote, OneNote), other online platforms offer collaborative fieldnotes tools, like Field Notes Community ([www.fieldnotescommunities.com](http://www.fieldnotescommunities.com)), SIL Fieldworks (<https://software.sil.org/fieldworks>) and Citavi (<https://lumivero.com/products/citavi>).

## DISCUSSION

We have foregrounded accounts from researchers who have participated in fieldnoting to draw insights about the challenges and benefits of research in a dynamic and hybrid landscape. In doing so, we have conceptualized flexible fieldnoting as a way to navigate and be attentive to six axes of flexibility:

1. Location: Notes track the research process as it unfolds across various platforms and sites, allowing for both connected and disconnected recording methods.
2. Format: Data is captured in diverse formats, with researchers navigating between predefined or spontaneously chosen format ensembles (organic), enriching the documentation process.
3. Team: Fieldnoting can be solely limited to the team of researchers (closed) or collaborative, embracing the collective input from multiple researchers and other stakeholders in different locations.
4. Timing: Notes are taken either synchronously with the research activities (immediate) or after fieldwork (delayed), ensuring timely and reflective documentation.
5. Interaction: Researcher collaboration is either integrated or compartmentalized, fostering dynamic exchanges that influence the note-taking process.
6. Archive: The organization of notes ranges from scattered and dispersed across original platforms to centralized repositories, balancing accessibility with field relevance.

Whereas prior literature privileges the formal extremes of these axes (i.e. disconnected, planned, closed, delayed, compartmentalized and centralized), fieldnoting in our projects fall closer to the other extreme points (e.g. connected, organic, open, immediate, integrated and decentralized). We do not advocate for one or another approach, but for acknowledging these variations and allowing projects to vary across them, depending on the characteristics and dynamics of the focal field.

Flexible fieldnoting can be greatly facilitated by computer-assisted qualitative data analysis software (CAQDAS), communication platforms and other collaborative tools. However, many software, such as Slack and 4K Stogram, have not been specifically designed to support flexible fieldnotes, and thus have limited functionality or are not committed to data preservation. To ensure that critical data is not lost due to changes in software features, a simple yet effective solution is to create backups of key items, such as offline PDF files and screenshots saved on cloud-based storage platforms or different hard drives.

## CONCLUSION

Flexible fieldnoting is a powerful practice for conducting research in dynamic, hybrid and globalized research landscapes. By navigating the multiple dimensions of flexibility – from following the action where it is happening to encompassing multiple participants, being in the here-and-now, working interactively to create notes and archiving information in various formats – researchers can create a rich tapestry of layered notes that express the richness of fieldwork. While there are inherent tensions within each axis of flexibility, the benefits of using flexible fieldnotes far outweigh the challenges.

In this chapter, we have drawn examples of flexible fieldnoting from our own work. However, we believe fieldnoting can be useful for any research team in which multisited researchers aim to capture emerging digital phenomena across platforms and with multiple participants, such as TikTok Live contents expressing a consumer culture trend. Flexible fieldnoting allows researchers to navigate and capture the complex and dynamic nature of such phenomena. The first axis of flexibility, for example, notes the importance of following the multisited field, which is crucial for TikTok Live contents as they might involve interactions across multiple platforms. The second axis emphasizes the importance of creating fieldnotes in multiple formats, which is especially relevant for TikTok Live contents, as they often require understanding a wide range of consumer-generated data, including images, videos, live chats and sometimes offline action too (like actual retail experiences). The third axis highlights the participatory nature of such phenomena and the need to involve multiple researchers in the process of fieldnoting. The fourth emphasizes the importance of capturing the immediacy of the experience, which is essential for the often ephemeral and fleeting TikTok Live contents. The fifth axis stresses the importance of the iterative process, requiring interactions among different researchers. Finally, the sixth highlights the importance of building an archive, which is crucial where there is a need to capture, retrieve, organize and systemize fieldnotes to avoid data overload. Ultimately, flexible fieldnotes allow researchers to be more agile, responsive and creative in their research, enabling them to capture the complexities of the multiplatform, multiformat and multisited environments in which they operate.

Note: For further discussion on this topic, please access a podcast prepared by the authors here: <https://www.dropbox.com/scl/fi/1wi8gmkxkk46767mllurr/Flexible-Fieldnoting-Podcast.mp3?rlkey=gvxvmwoksw1n8s9tnrfwnq4e5&dl=0>.

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## 36. Multisited ethnography<sup>1</sup>

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*Karin M. Ekström*

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### INTRODUCTION

Today's society faces many severe problems, such as climate change, overpopulation, refugee crises, homelessness, poverty, racial discrimination and gender inequality. The complexity of these dilemmas makes it important to understand them from different perspectives, rather than focusing on merely one angle. Multisited ethnography, described in this chapter, offers ways to comprehend the multifaceted nature of different issues. It allows us to explore various views and directions that are beneficial for recognizing, understanding and trying to tackle issues, rather than viewing them from a unidimensional perspective. As Marcus (1998, 83), who introduced multisited ethnography, observes:

Although multi-sited ethnography is an exercise in mapping terrain, its goal is not holistic representation ... Rather, it claims that any ethnography of a cultural formation in the world system is also an ethnography of the system, and therefore cannot be understood only in terms of the conventional single-site mise-en-scène of ethnographic research, assuming ... the cultural formation, produced in several different locales, rather than the conditions of a particular set of subjects ... is the object of study.

The purpose of this chapter is to highlight the benefit of multisited ethnography in marketing and to describe its emergence in anthropology and marketing. I begin with a short introduction to how multisited ethnography created a paradigm shift in anthropology, and then devote the remainder of the chapter to delving into the elements, benefits and challenges of conducting multisited ethnography, paying particular attention to its use in marketing.

### A PARADIGM SHIFT IN ANTHROPOLOGY

Ethnography has traditionally involved spending a long time in a remote location far from home, seeking a deeper cultural understanding of certain phenomena. However, in the mid-1980s, a paradigm shift occurred in anthropology, stimulating a discussion about both representation of the field and the researcher's role, leading to new ways of seeking knowledge (e.g. Gupta and Ferguson, 1997). New ways of conducting ethnography were introduced, and today, multisited ethnography challenges the long-established approach for conducting single-sited ethnographic fieldwork. Although fieldwork has historically been a definitive ingredient of anthropology and ethnography, the change to multiple sites has not occurred without opposition. There has been concern regarding the direction that anthropology is heading, fearing the loss of the 'thick description' for a more superficial interpretation of cultural meaning due to the lack of a deep dive at each site. Others point to benefits of the multisited approach, like the possibility of producing and disseminating knowledge in new

ways. In a changing world, conventional ethnography is insufficient for studying the ‘circulation of cultural meanings, objects and identities in diffuse time-space’ (Marcus, 1998, 2).

The paradigm shift has led to a reinterrogation of the nature of fieldwork. Whereas fieldwork historically implied a clear distinction between home and place of discovery, today this boundary is unstable and is constantly renegotiated. Spatial practices involving moving to and from, and passing through and dwelling in the field (e.g. establishing rapport, initiation into and familiarity within fieldwork locales) are changing (Clifford, 1997). A newer suggestion is to conceptualize the field as *habitus* instead of place, involving embodied dispositions and practices. Society has changed, and much has happened since the early anthropology studies. Traditional anthropological fieldwork is best suited for conditions in which the people studied communicate orally and do not move around, making it easier to monitor them (Hannerz, 2001). The possibility to travel and communicate in many different ways opens up new means of conducting fieldwork.

The meaning of ‘local’ can also be questioned, particularly in today’s society, where media and popular culture from around the world reach even the most remote places. Giddens (1991, 188) writes, ‘Although everyone lives a local life, phenomenal worlds for the most part are truly global ... localities are thoroughly penetrated by distanciated influences.’ Grewal and Kaplan (1994, 11) also observe: ‘the parameters of the local and global are often indefinable or indistinct – they are permeable constructs. How one separates the local from the global is difficult to decide when each thoroughly infiltrates the other.’

The traditional emphasis on hanging out deeply in the field at one site can today be broadened by including several sites. Additionally, it is no longer mandated for an anthropologist to travel to a remote place; a fieldsite can be a local neighborhood, office, laboratory, store, brand community, coffee shop or franchise (e.g. McDonald’s). Gupta and Ferguson (1997) advocate that the anthropology of today focuses on shifting locations rather than on bounded fields; however, the goal of conducting a significant piece of fieldwork persists. Clifford (1997, 209) writes, ‘ethnography is no longer a normative practice of outsiders visiting or studying insiders’, but, in Narayan’s (1993, 30) words, of attending to ‘shifting identities in relationship with the people and issues an anthropologist seeks to represent’.

Certainly, the ethnography of today looks different than in earlier days. Today, we witness use of a variety of methods, including longer and shorter-term stints in the field, interviews, participant observation, netnography, videography, photography, narratives and storytelling. Arnould and Price’s (1993) study on river-rafting provides an example of use of multiple ethnographic accounts over an extended period, in the same field site.

The paradigm shift to multisited ethnography involves discussing the researcher’s role in producing and creating knowledge. Rabinow (1977) argues the participant-observer is influenced by the collection of cultural data. He scientifically legitimized including the researcher’s own experience in a study. Clifford (1997, 217) writes that a certain degree of autobiography is now accepted, but wonders about how much. He thinks encounters in the field are still important:

Travel, redefined and broadened, will [constitute] fieldwork at least in the near term. This will be necessary for institutional and material reasons. Anthropology must preserve not only its disciplinary identity, but also its credibility with scientific institutions and funding sources.

As mentioned previously, the paradigm shift has also led to questions about traditional field-work – e.g. to what extent reality is or can be represented, and whose voices are made explicit. The debate during the mid-1980s (e.g. Clifford and Marcus, 1986) made both research and writing more reflexive and questioned gender, class and race (Denzin, 1997). Reflexivity encompasses not only concern about how data are collected and analyzed and how theories used in the analysis are written, but also a concern with how the ethnography itself is written up. Denzin (2001, 324) notes: ‘writing is not an innocent practice’. Hammersley and Atkinson (1995, 16) observe: ‘Reflexivity thus implies that the orientations of researchers will be shaped by their socio-historical locations, including the values and interests ... locations confer upon them.’ Also, thick descriptions emphasized in realistic ethnographies have been criticized for an inability to recognize power relationships and factors behind these reports (e.g. Arnould, 1998; also see Joy et al. this volume).

Van Maanen (1988) discusses different ways to present research. The *realist tale* encompasses four conventions. First, it is the members of a culture being studied, rather than the author, who are made visible in the text. Second, the researcher adopts a documentary style focusing on the mundane details of everyday life in the field. Third, the native’s point of view is portrayed through events (particularly the routine events) of the culture. Finally, the field-worker adopts a stance of interpretive omnipotence, meaning they have the final say regarding how the culture is presented and interpreted.

The *confessional tale* encompasses three conventions. First, the researcher conveys a personalized author(ity), describing how they accomplished the fieldwork odyssey. Second, the fieldworker’s point of view is represented as they present themselves as both vessels and vehicles of knowledge. Third, the researcher strives for naturalness, meaning they try to ensure the materials are reasonably uncontaminated and pure, despite any problems encountered in interpretation.

Finally, the *impressionist tale* focuses on both conducting the fieldwork and crafting the story. It encompasses conventions such as textual identity, fragmented knowledge, characterization and dramatic control. Textual identity focuses on the story and leaves the interpretation to the audience, by placing them in the fieldwork situation. To capture how fieldworkers may have experienced events, knowledge is presented in fragmented form, and characterization finds fieldworkers providing voices to those with whom they interact in the field. Finally, dramatic control implies the researcher organizes and presents the narrative to carry the reader along, honoring artistic nerve and literary standards while doing so.

Although ethnographic texts historically have been monologic, there is a shift toward text that accommodates a multiplicity of voices (Atkinson and Hammersley, 1994). This change is in line with postmodern ethnography. An example is Dwyer’s (1982) study in Morocco, where he engages in a series of dialogues with a key informant to understand his life, and those in his village. Atkinson and Hammersley (1994, 256) cite Tyler’s (1986, 126) observation that:

The postmodern author seeks to dissolve that disjunction between the observer and the observed. The trope of ‘participant observation’, which captures the ambivalence of distance and familiarity, is replaced by one of ‘dialogue’, showing ‘the cooperative and collaborative nature of the ethnographic situation’.

Thus, emphasizing the subjective nature of ethnography, Tyler prefers the goal of ethnography as evoking rather than representing the social world.

The postmodern movement also has led to experimentation with textual styles and formats, a focus that may privilege the rhetorical over the scientific (Atkinson and Hammersley, 1994). In future, it is important to focus on strategies of reading and writing ethnography to evaluate the quality of arguments and use of evidence (Hammersley, 1991, 1993). Fischer (1999) emphasizes that ethnographic practice in the future needs to juxtapose, complement or supplement other genres of writing such as those by historians, literary theorists and photographers.

Again, the paradigm shift toward multisited ethnography did not occur without raising concerns in anthropology. Clifford (1997) worries that multilocale field studies are a symptom of postmodern fragmentation. He wonders if it can be collectively fashioned into something more substantial, and emphasizes critical dialogue and respectful polemic. Below, I delve more specifically into the benefits and challenges of multisited ethnography, which shares the goal of single-sited anthropology to understand culture in-depth.

## MULTISITED ETHNOGRAPHY

### **Multilocal Ethnography**

Marcus (1986, 1989) introduced the concept of ‘multilocal ethnography’ into anthropology; later, he preferred ‘multisited’ (Marcus, 1995, 1998), a term that has become commonly used internationally.

Hannerz (2001) was also an early proponent of multilocal ethnography. He emphasizes the term not only implies several field sites, but that these sites are linked in a coordinated structure, or a network of localities. Of interest to researchers is trying to identify the chains and patterns of social relations that exist in the network (e.g. Hannerz, 1996, 2001). Furthermore, the field is not only multilocal, but *translocal*, the latter focusing on identifying the relationships between the localities (Hannerz, 2001). The social anthropologists at Stockholm University pioneered work along these lines; Hannerz (2001) observed they probably have conducted a wider selection of studies than most institutions in the world. An early example is Garsten’s (1994) doctoral dissertation ‘Apple world’, in which she studied the organizational culture of the computer company in its office in a Stockholm suburb, in its international headquarters (Silicon Valley) and in its European headquarters (Paris). An ongoing study (Ekström, 2024) focuses on the role of different actors (e.g. museum representatives, glass artists, glass collectors and auctioneers) in constructing the value of contemporary art glass.

### **Multisited Ethnography**

In describing the emergence of multisited ethnography in anthropological research, Marcus (1995) explains it is used particularly in new spheres of interdisciplinary work; e.g. in various strands of cultural studies. He also emphasizes conventional ethnography is insufficient for studying the circulation of cultural meanings, objects and identities in diffuse time-space (Marcus, 1998, 90). He elaborates:

Multi-sited research is designed around chains, paths, threads, conjunctions, or juxtapositions of locations in which the ethnographer establishes some form of literal, physical presence, with an explicit, posited logic of association or connection among sites ...

Multisited research has emerged in media studies, and in the social and cultural study of science and technology (Marcus, 1998). Both Latour (1993, 1998) and Haraway (1991) have published multisited research. In consumer research, Canniford (2005) offers an example of multisited research, when he reassesses the experience of global cultures amidst the international surfing scene. By talking to/interviewing surfers in different locations in Indonesia, reviewing films and other media and leveraging historical data, he demonstrates how local sovereignty is pooled on a global stage. Other classical examples in marketing of multisited consumer research are Schouten and McAlexander's (1995) study of the HDSC bikers, Belk and Costa's (1998) multiple-location study of the mountain man persona, and Belk et al.'s (2003) exploration of what desire means in the United States, Turkey and Denmark.

Different techniques exist to conduct multisited ethnography, such as 'follow the ...' people, things, metaphor, plot, story, allegory, life, biography or conflict (Marcus, 1998). Migration studies often employ the 'follow the people' technique (e.g. Francisco-Menchavez, 2020; Sanò and Della Puppa, 2021), as do those that shadow people who move around in multinational contexts (e.g. Czarniawska, 1998). Curasi et al. (2004) demonstrate 'follow the thing', when they study the intergenerational object transfer of heirlooms. Martin (1994) exemplifies 'follow the metaphor' in her study on the body's immune system. Her work also illustrates how the researcher can renegotiate identities in different sites – e.g. being an AIDS volunteer at one, a medical student in another and a corporate trainee at a third.

Following the formation of the plot, and thereby the story, is typified in Czarniawska's (2004) work on action nets and people who move around. 'Follow the life/ biography' is illustrated in a study on the meanings of food among elderly at different ages and life situations (Brembeck et al., 2005). 'Follow the conflict' can involve, for example, legal issues or media issues, as in Hardtmann's (2001) study of resistance activists in India and England who are against the caste system.

### **Challenges of Multisited Ethnography**

Van Duijn (2020) writes about the challenges encountered in multisited ethnography, after exploring the strategic collaborations emerging after the Dutch healthcare reform of 2015. These challenges being able to: 1) answer 'Whose side are you on?' – a question often crucial in negotiating access to follow unfamiliar or perhaps even initially hostile informants; 2) be everywhere and nowhere at once (e.g. following a participant in as boundary-less a manner as possible, while keeping critical distance); 3) interpret a patchwork of data, by trying to still offering a useful and valid interpretation rather than 'a plethora of perspectives across sites which may or may not align' (Van Duijn, 2020, 281). Granted, these different perspectives are one of the major benefits of multisited ethnography, compared to a single-site study.

Finally – and as is true for single-sited studies – most multisited ethnographies are limited in time. A longitudinal research design can offer both the benefit of understanding different perspectives, and also how these shift over time. Francisco-Menchavez (2019) conducted a five-year multisited ethnography between New York City and Metro Manila, as he studied Filipino transnational families and stepwise migration strategies.

## Translocale Ethnography

This form focuses on identifying the relationships among localities (Hannerz, 1996, 2001); however, the term ‘translocale’ is seldom used. In international anthropology, it is more common to use the term ‘multisited’, which encompasses translocale. Appadurai (1996, 192) uses ‘translocalities’ to characterize places people circulate through, rather than those where they anchor themselves. Garsten (2001) conducted a translocale study on Olsten Staffing Services in which the project employed consultants who worked for different companies and continuously changed offices. In translocale field studies, the process of transfer and the motion is particularly interesting (Hannerz, 2001). The participants’ inputs and relations can be just as short-term as the anthropologists’ in such translocalities as conferences, courses and festivals (Hannerz, 2001). Relatedly, Czarniawska (2004) introduces the concept of mobile ethnologies for studying the life and work of people who move in contemporary organizations.

## Implications for Conducting Multisited Research

There are several important aspects to consider when conducting multisited, multilocale or translocale fieldwork. First is a need to define and rethink the field. Gupta and Ferguson (1997, 5) write: “‘The field’ is a clearing whose deceptive transparency obscures the complex processes that go into constructing it.” Second, is the need *to determine what localities to include*. Sometimes, these choices might be quite obvious, at least at the beginning of a study; other times, the choice of localities might develop during the study.

Again, to define and rethink the sites requires creativity (e.g. Marcus, 1998). Interdisciplinary research can be expected to contribute to this conceptualization, as new perspectives, theories and methods are made visible. Creativity emerges in intersections across disciplines. Also, multisited research can challenge disciplinary perspectives (Marcus, 1998).

The extent to which the localities are comparable also varies. Not all sites are uniform; they may require different practices and opportunities. Hannerz’s (2001) term ‘translocale’ emphasizes the importance of identifying the relations between the localities. It is important for researchers to think about relationships, associations and connections before, but also during, fieldwork.

Comparisons not previously considered come to mind. They develop throughout movement and discovery among sites rather than being predetermined. The effects of simultaneity are exemplified by looking at the action happening in different locales as a consequence of an event such as a scandal (Marcus, 1998).

A crucial component in multisited research is translating cultural idioms from one language to another. This concerns all interpretive research, but is particularly significant for multisited variants. Marcus (1998, 84) writes this process ‘requires considerably more nuancing and shading as the practice of translation connects the several sites that the research explores along unexpected and even dissonant fractures of social location’. Engaging in translation may help us to understand change more fully, in that the process entails watching how, for example, ideas, objects and humans travel. Peñaloza (1994) illuminates the translation process when describing the Mexican immigrants’ consumer acculturation process; that is, their use of cultural signs and heuristics from the previous system in the new system.

Participant observation has always been integral to anthropology. Gusterson (1997) emphasized it is important to consider the character of polymorphous engagements in contemporary

fieldwork, rather than participant-observation fetishism. Hannerz (2001) mentions several studies in his anthology on translocale ethnography that include more interviews and fewer observations than is common in traditional anthropology. He offers these reasons: first, the multilocal fieldworker might have less time to spend in observation. Second, texts and media comprise a large(r) part of many contemporary field studies; thus, if today's studies feature less participant observation, they may include many other, previously nonexistent types of materials. This new repertoire does, however, demand new skills for interpretation, creation, composition and synthesis. Also, media play an important role in keeping the translocale fields together, by making them translocale instead of merely multilocal.

As noted earlier, reflexivity is an important aspect of multisited research. Relatedly, the ethnographer's identity requires negotiation across sites. Because ethnography entails being in the field and writing up the fieldwork, it is important to consider reflexivity during both components of the research process.

Multisited research can also allow new ways of conducting research, such as new methods and media, which also capture a multiplicity of voices. Arnould and Price (1993), Joy and Sherry (2003) and Peñaloza (2001) have used multivocal techniques in consumer research. These voices can include not only the researcher and the informants, but also the things studied. Material culture studies (e.g. Miller, 1987, 2010) allows for things to make their voices heard. Latour (1993, 1998) criticizes the separation between humans and nonhumans, asserting that people and things, nature and culture should be studied in relationships (see Rodner, this volume). This is particularly relevant to consider as the world wrestles with climate change and other social problems; sustainability is about respect for both nature and people. To that end, Crate (2011) argues for developing critical collaborative multisited ethnography among anthropologists studying climate change (e.g. 'climate ethnography').

The use of multisited research to explore complex social problems is important to highlight. Oute and Bjerge's (2019) multisited ethnographic field study of access to care services explores the management of citizens with complex problems in Danish welfare systems. Informants were simultaneously in contact with drug treatment systems, employment services and the psychiatric system. Furthermore, multisited research is valuable for understanding cultural changes, as Afeltowicz et al.'s (2021) study of four new cultural institutions in Poland after the accession of Poland to the European Union in 2004 reveals.

### **A Call for More Multisited Research in Marketing and Consumer Research**

Multisited research is becoming more popular in marketing; however, the majority of studies in marketing remain single-sited. Additional examples of multisited work in marketing include the following: Kjeldgaard and Askegaard's (2006) multisited study on young consumers in Denmark and Greenland, where they found certain segments represented globally and appropriated locally in urban as well as rural contexts; Ücok and Kjeldgaard's (2006) research on Turkish transmigrants, where they interacted with them at home, work, social occasions and other contexts to and from Denmark and Turkey; Ger and Belk's (1999) study on materialism in four sites, where each researcher investigated two sites and at each, one researcher was an insider and the other was an outsider. As Sherry notes in this volume, different research team members can offer different skills, tools, relationships and specializations to bolster the work. Recently, Ekström and Jönsson (2022) studied three small cities in Sweden and conducted in-depth interviews with representatives of retailers, municipalities, business/city associations

and landlords, and presented the eco-retail system by leveraging an ‘orchestra’ metaphor. Visconti et al. (2010) studied a multisited ethnography of public place consumption via street art, including fieldwork in several countries as well as a netnographic exploration of the internet presence of street artists in cities globally.

More multisited studies in marketing should be encouraged. Transformative Consumer Research (TCR) is an example of a research area that could benefit from this type of work, as it tackles the multifaceted, complex and wicked social problems mentioned in the introduction to this chapter. Indeed, the role of marketing needs to be examined from different perspectives. Most research in marketing has historically focused on (and still does today) micro perspectives dealing with how marketing should be performed. There is a need to better understand how these practices and techniques relate to underlying ideologies, myths and power struggles. Research that explores (or combines) meso and macro perspectives on the role of marketing should be encouraged, including perspectives from a variety of actors and contexts.

Furthermore, binary distinctions such as ‘global’ and ‘local’ are also common in marketing. Multisited studies can of course be conducted for both types of studies, but it is important to recognize that these arenas are linked and interdependent. The example below is designed to reinforce that critical point.

## MULTISITED RESEARCH RELATED TO CLIMATE CHANGE: AN EXAMPLE

This section describes an ongoing multisited study dealing with climate change. Specifically, the forest is expected to contribute to the transition towards environmental sustainability, according to the Paris Agreement (UN, 2023). By not harvesting the forest, carbon dioxide remains stored in the soil. At the same time, instead of cement and fossil-based raw material, resources from the forest are expected to be used for buildings; hence, the forest needs to be harvested. In addition to differing opinions on the issues above, different views exist on the practices of managing a forest (e.g. planting and harvesting).

An understanding of consumption practices (e.g. Shove et al., 2012; Warde, 2005) related to the forest, including consumption of wood products, can be better understood by multisited research. For example, a popular consumption practice in Sweden is building a wood deck attached to a house. For homeowners, it is an important status symbol, and also a way to build and maintain relations with others. As such, building a wood deck seems to have become a cultural norm. Consumers typically buy new wood boards for the deck, rather than reusing old ones. Wood can be considered as a genuine material, but it can also be interpreted as wasteful to use wood if trees are expected to be kept growing in the forest. A multisited study of consumption of decks by ‘following the things’, (e.g. wood boards), can involve interviewing consumers buying wood for a deck, tracing purchase to the hardware store selling the boards, to the forest industry and sawmills, and all the way back to the owners of the trees growing in the forest. The multiplicity of voices should provide an understanding of whether and how consumers’ choices of wood products are related to ideas and knowledge of the forest and its wood products. Furthermore, views of the intermediaries and stakeholders on the consumption of wood boards and decks would be beneficial, including their views on the role of the forest. In short, a multisited study will make it possible to identify different actor’s complex relations as well as possible links between macro, meso and micro levels.

## CONCLUSION

Multisited, multilocal, and translocale ethnography have brought new ideas into the field of ethnography and to anthropology. It is useful for studying global markets as well as for focusing on local markets. It can be seen as a way to understand micro-meso-macro relationships. Rather than viewing consumers and marketers as binary opposites, multisited research allows for these stakeholders to be seen as interdependent and for researchers to develop an understanding of cultural formation. Multisited research can contribute to making consumers, producers, marketers, consumer advocates, organizations and different authorities aware of their different experiences and relationships. There is a need to develop multisited ethnographic research in marketing, to understand the circulation of meanings, objects and identities in contemporary society. There is also a need to develop multisited locale research, since seemingly local and bounded phenomena are created and performed in a multisited field. Major societal problems – not the least of which is climate change – makes it important to understand different perspectives rather than focusing on one angle.

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## 37. Qualitative data software for coding

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### INTRODUCTION

Qualitative research deeply explores a phenomenon of interest, and this process involves the collection and analysis of rich and varied data (Lester et al., 2020). In contrast to quantitative methods, which employ precise and rule-governed analysis techniques, qualitative methods are associated with a greater amount of researcher involvement and subjectivity (Langley and Klag, 2019). Researcher involvement is ideal for qualitative approaches, as it is this theory-laden immersion in the data that allows the researcher to gain rich and nuanced understandings of complex, context bound phenomena (Goulding, 1998). Qualitative researchers also need to make judgements regarding *how* to engage with analysis. The use of computer assisted qualitative data analysis software (CAQDAS) is one approach that provides solutions to challenges associated with more traditional techniques.

Historically, manual analysis – either with pen-and-paper or basic word processing systems – has been a common approach to the handling of qualitative data (Maher et al., 2018). The goal of this relatively unstructured approach is to facilitate researcher immersion – a sense of ‘drowning’ – in the data to allow the discovery of new or unexpected understandings (Maher et al., 2018; Suddaby, 2006). Despite the benefits of a highly manual approach, there are costs regarding researcher time and energy, which can paradoxically constrain the development of insight. Manual analysis can also produce challenges when handling large amounts of data and impede collaboration with other researchers. Analysis becomes a weighty, lengthy and labor-intensive process. CAQDAS packages address these challenges, and the use of these technologies to facilitate qualitative data analysis has garnered significant attention. Despite the potential benefits of CAQDAS, tension remains regarding best practice in contemporary qualitative research, and the place for and ideal uses of these systems versus more traditional techniques.

This chapter outlines qualitative coding methods and the role of CAQDAS in this process. The benefits and downsides of using CAQDAS in qualitative analysis are outlined, and implications – particularly those for novice researchers – are explored.

### THE QUALITATIVE DATA ANALYSIS PROCESS

Qualitative studies prioritize verbal, textual and/or visual data. These include speech (e.g. people’s spoken words), text and visual formats that can be found or created (e.g. drawings, photographs or video). Audio and/or visual recordings involving speech are often converted into text, as transcription allows for faster processing by the researcher and facilitates the identification of key terms during analysis (Oliver et al., 2005). Visual data are treated similarly, with the aim to translate visual content into language-based descriptions, encompassing the content of, and relationships between, the elements depicted.

It is common for researchers to analyze data *in situ*. Belk et al. (2012) explain the concept of an inward/outward research design meaning that iterative analysis will direct future sampling and data collection processes within the project. Often researchers enter the field with preexisting ideas for analytic interpretation (McCracken, 1988). Solo (and teams of) researchers conducting data collection using observational, ethnographic and netnographic work require continued reflection on their earlier and ongoing impressions or hunches of the research field, which would be noted down in memos or during debriefing meetings. Side comments and discussion between researchers conducted in the margins often begin organizational categories that are used and developed during data collection.

Regardless of format, qualitative analysis involves a subjective interpretation of this data by the researcher, who ascribes meaning through their understanding of the research questions, relevant theory and social context (Goulding, 1998). Analyzing qualitative data, therefore, requires the researcher to interact deeply and meaningfully with the data – asking questions, going beyond surface meanings, and searching for narratives (Ferreira and Scaraboto, 2022). The specific techniques employed to interact with qualitative data are guided by diverse theoretical perspectives. What is common across these perspectives is that, despite the flexibility and subjectivity of qualitative approaches, rigorous processes are employed.

While a thorough description of every approach to qualitative analysis is beyond the scope of this chapter, it is sufficient to suggest that qualitative data analysis generally involves many activities that researchers move through and/or between (Saldaña, 2016). Broadly, data analysis involves forms of the following activities: data reduction, data display and conclusion drawing or verification (Miles et al., 2018). Data reduction involves using procedures to meaningfully condense and organize the data (Namey et al., 2008). Qualitative data display involves using exemplars from the data to communicate the categories or themes that emerge. The outcome of these activities is to arrive at overarching theoretical conclusions (Morse et al., 2002). The use of CAQDAS has implications for each of the above activities; however, the following sections focus on the use of software in data reduction, particularly, the process of coding.

## THE ROLE OF CODING

Qualitative data is dense and requires the researcher to spend significant time reading and rereading the data (Elliott, 2018). This is often described as immersion, and the goal is for the researcher to become deeply familiar with the data (Bennett et al., 2019). This immersion is characteristic of the inductive goals of qualitative research and involves a variety of activities with the research question(s) front of mind – noting impressions, patterns and relationships in the data (O’Kane et al., 2021). Certain theoretical perspectives engage in structured steps or stages to move through this immersion and arrive at theoretical insight (e.g. grounded theory; Glaser and Strauss, 1967), while others draw on a diverse and reflexive range of activities (O’Kane et al., 2021; Pratt, 2009).

Regardless of the theoretical perspective underpinning the approach to analysis, coding is an important activity that allows the qualitative researcher to begin making sense of and organizing the data during the cyclical process of reading and rereading (Saldaña, 2016). Coding involves applying codes or labels according to relevant characteristics, ‘essentially indexing or mapping data, to provide an overview of disparate data that allows the researcher to make

sense of them in relation to their research questions' (Elliott, 2018, 2851). The researcher arrives at these codes or labels by asking questions of the data, building an understanding of the meanings present, and identifying how these can be organized using a brief name or label (Charmaz, 2006). These names/labels can be broadly descriptive, with the primary goal of summarizing the data. Such descriptive codes are often described as first level codes, which provide the groundwork for higher order coding to label patterns or more abstract interpretations of the data. The main objective is to create themes (or categories) in the literature, which are 'broad units of information that consist of several codes aggregated to form a common idea' (Creswell, 2013, 186). Thus, themes may be an outcome of the coding (i.e. primary level), or processed from categorization or analytic reflection (i.e. secondary level), 'but are not something that is in itself, coded' (Saldaña, 2016, 15). The analysis of codes offer labels that assign symbolic meaning to descriptive information, which create such important themes.

Coding allows the researcher to turn the data into a clear and cohesive narrative that distils the meanings present (Linneberg and Korsgaard, 2019). This summarization is useful for further analysis, during which codes can become categorized, and merged into overarching communicative themes. A process of ongoing comparison of data to data and codes to codes is key to the identification of meaningful relationships, patterns and nuance that form the basis of these themes (Maher et al., 2018). Due to its immersive and cyclical nature, coding can be a lengthy, laborious, but necessary pathway to the generation of empirical insight (Ryan and Bernard, 2003).

### **Practicalities in Coding**

For deeper immersion and researcher proximity with the data, listening when reading transcripts provides an opportunity to check the quality of the transcription. Despite it being time-consuming, researchers transcribing their own interviews will become well versed and familiar with their data and participants. Making notes or memos throughout the immersion process is valuable as it creates an audit trail; that is, a reminder of what the researcher is thinking at different points in the analysis and why particular decisions were made. Keeping a reflexive diary throughout the research process (from the development of a research question to interpretations of the findings) not only brings the researcher closer to the data but it increases trustworthiness of the thinking that goes on during analysis.

Coding can also be completed manually using hard copies of data, highlighter pens, scissors, sticky notes, or whiteboards and visual mapping. These manual approaches allow for greater interaction between the researcher and the data and constant comparison, reflection and interpretation. Alternatively, coding can be performed in word or text processing software using the coloring highlighter option or 'add comment' feature. There are further options available, especially when dealing with social media websites such as Facebook or Instagram, where the researcher can choose to 'print' the page as PDF, then open the page using Adobe Acrobat and click on 'edit PDF' to make the content searchable and codable (Eagar et al., 2022). Ultimately, coding procedures are active analytic processes that require evolving, iterative and subjective interpretations and engagement with the data.

### **Ontological and Epistemological Perspectives on Coding**

Not all qualitative researchers are the same. They have varied logics in their evaluation of data based on ontological and epistemological thinking, or theory of knowledge in relation to how we view reality, which leads them to different approaches to coding. We explain the differences here as they will have implications on how coding is conducted.

As with most inductive qualitative research that aims to build theory, deep and insightful interactions with the data are prerequisites to interpreting qualitative data and that is expected from most objective and subjective epistemologies. Unlike positivist models of scientific inquiry where researchers maintain a degree of distance from the object of inquiry, in an interpretative model ‘the researcher is considered to be an active element of the research process, and the act of research has a creative component’ (Suddaby, 2006, 638). Thus, there is a constant immersion or ‘drowning’ in the data (Suddaby, 2006) and several iterations between data collection and analysis, with ongoing analysis guiding the following stages of data collection and creative interpretive insights grounded in data.

Whether the qualitative researcher has a worldview that is postpositive, interpretive or critical theory, they are expected to explore the data using ideas or hunches and reflecting on patterns in the data. An inductive research entails following specific steps in ‘seeing’ the data. For instance, with a grounded theory method, the researcher follows data analysis methods of open coding, axial coding and selective coding to answer the research problem (Glaser and Strauss, 1967). With interpretative phenomenological analysis (Thompson et al., 1989) the researcher often follows necessary steps of bracketing (preconceived beliefs or opinions), intuiting (an understanding of the phenomenon at hand), analyzing (through coding with complete immersion in the data) and describing the data (through reporting). Others use reflexivity and methodological bricolage to adapt to the research question(s), data, and coding practices (Pratt, 2009).

The key takeaway is that, while methodological templates underpinning epistemological and varied ontologies make qualitative research accessible to researchers, there is a diversity of methodological resources available, which should encourage researchers to draw on such diversity. Foundational assumptions of qualitative research provide opportunities to lean on diversity of methods, agency and voice of researchers and creativity in design to solve the research problems the researcher is set to answer. Coding should support such goals, not impede them.

## **COMPUTER ASSISTED QUALITATIVE DATA ANALYSIS SOFTWARE**

Traditionally, manual methods of coding require the researcher to craft various tools to store, organize and visualize the data. An ‘old-school’ approach can include generating spreadsheets, using highlighting and commenting functions, or even preparing physical collages, notes and indexing systems. While this process is often aided by technology in some capacity – e.g. via audio and visual recording devices, word processing or spreadsheet platforms – CAQDAS provides a more centralized location for the storage, analysis and visualization process (Parameswaran et al., 2020). This centralization, and the purpose-built tools within CAQDAS,

can render an unwieldy coding process more intuitive, transparent, user-friendly and collaborative (Dalkin et al., 2021).

CAQDAS has been available since 1984, marked by the development of a program called Non-numerical Unstructured Data Indexing Searching and Theorizing (NUD\*IST) that was specifically designed for qualitative data management. Since its early developments, programmers – in collaboration with qualitative researchers – have created several data software packages for researchers to choose from such as ATLAS.ti, MAXQDA, NVivo, Hyperresearch, ELAN, Dedoose and Transana,<sup>1</sup> some of which are subscription-based and others are open-source. Given the difficulty in evidencing the analytical processes, large amounts of data(sets) that can be collected and varied methodologies in qualitative research, CAQDAS aids researchers in providing a trustworthy and transparent picture of the data while maintaining an audit of analysis processes as a whole; something that has often been missing and viewed as mysterious in qualitative research reporting (Welsh, 2002).

With reference to the coding process, CAQDAS allows the qualitative researcher to search for and highlight key segments of data more easily. When a potential code is identified, CAQDAS facilitates fast application of these codes to relevant extracts, and then allows for seamless organization of these codes into categories, or ‘nodes’, within the interface. Applying multiple codes to the data can also be more straightforward and easier to manage within CAQDAS, and this is particularly helpful when the research question(s) require testing the fit of different theories to the data. Tools are also available within CAQDAS to comprehensively visualize the emerging coding structures, assisting with the development of nuanced understanding, higher order coding, and ultimately, overarching themes and theoretical insight.

It is important to note, however, that despite the benefits of CAQDAS, the decisions regarding what, when and how to use the available tools remain in the hands of the researcher. Unlike quantitative data processing systems, CAQDAS is not designed to automate the analysis process, nor should it increase the distance between the researcher and the data. The coding process is mediated by the researcher, and the quality of coding produced remains dependent on the researcher’s capacity. This capacity includes careful decision-making in order to generate reflexive methods of using available CAQDAS features to respond to the requirements of the data, research questions and theoretical perspectives. Regardless of the mode of analysis – manual or CAQDAS assisted – the researcher plays an equally central role, requiring significant critical thinking, reflection and time spent with the data to produce useful codes (O’Kane et al., 2021).

### **Practicalities of Coding with CAQDAS**

CAQDAS can play a role in each of the stages of the qualitative analysis process – from data collection through conclusion drawing and verification. Researchers can create, store and safeguard qualitative datasets within the CAQDAS system, including importing and creating transcripts, field notes, visual and audio files for processing. Datasets can be password protected, and depending on the CAQDAS selected, can be worked on simultaneously by researchers across geographic locations.

## CAQDAS Capabilities

For some researchers, the key capability of CAQDAS is in its strength in data management, storage and sharing, with relatively limited exploration of the variety of features offered for further stages of the analysis process. Researchers find these packages useful for burrowing through a large digital file for particular words, phrases, images, video slices and other specific segments in digital files. At a minimum, CAQDAS provides an accessible platform to read, review and annotate the data, and for some researchers this approach can be hybridized with more traditional techniques.

CAQDAS also contains features that transcend those of word processing or spreadsheets. Qualitative researchers can do some automated coding, and trial out different modes of analysis and interpretations. Not only do these features have the potential to make the data analysis process easier for the researcher, they also have the capacity to specifically enhance credibility and facilitate the development of insight. When CAQDAS is employed for the bulk of analysis, the researcher's processes can be made transparent and replicable; outcomes that are far more challenging with manual analysis. Further, the speed and ease associated with CAQDAS tools can be highly supportive of the goals of a range of research methodologies, and the researcher's capacity to develop insight (Parameswaran et al., 2020).

O'Kane et al. (2021) provide a useful summarization of six overarching CAQDAS techniques. These techniques are flexible and can be operationalized within a variety of methodological frameworks to explore data, build a coding framework, identify patterns and develop insight. These techniques are proposed as enabling tools for reflexive moments, described as 'times during a research project – or more specifically during analysis – when a researcher recognizes new insights or ways to understand the story in the data' (O'Kane et al., 2021, 106). The authors propose the below techniques as those that researchers may explore and find useful in the search for reflexivity, rather than a prescriptive or exhaustive methodology for the use of CAQDAS:

1. *Text retrieval*: CAQDAS allows for fast searches of words/phrases within the dataset. Search results can provide an overview of word/phrase occurrences, but they importantly allow navigation to these occurrences in context of the surrounding data. While quick and easy text retrieval has obvious benefits from the perspective of convenience, it is more powerful than this, particularly when the qualitative researcher is developing insight or a hunch. Ease of search facilitates the building of insight, which can easily be lost, forgotten, or otherwise not borne out to full potential with manual line by line coding. Text retrieval allows for the seamless application (and editing) of codes as a framework emerges, freeing the researcher's cognitive capacity and therefore potentially expediting their arrival at key insights.
2. *Word frequencies*: Understanding frequently occurring words or terms within the data can be central to the formation and confirmation of initial ideas during the coding process. Frequently occurring words can be highlighted in CAQDAS either manually (through the text retrieval process outlined above), or automatically, through search capabilities that summarize frequently occurring words within the dataset. Results can be displayed in a highly visual manner (e.g. via word cloud) providing a digestible snapshot of the data that may either (a) confirm initial hunches or ideas, or (b) illuminate novel pathways for further exploration.

3. *Query by example:* A further method of exploring hunches or ideas beyond text retrieval involves a symbiotic process between the researcher and the artificial intelligence embedded in CAQDAS. Query by example involves more detailed researcher descriptions being run as queries, which are then compared to other passages of data. The results of these queries provide the researcher with a sense of how well the data fit the emergent theme(s) identified, which can be fed back into the program to refine further queries. This process allows CAQDAS to learn from the researcher (i.e. by learning which segments of data are useful for subsequent queries), and the researcher to learn from the system (i.e. by identifying how well the data fits with their emerging framework for understanding it).
4. *Code frequency:* The frequency of code occurrences can be highly instructive for the qualitative researcher, particularly when aiming to refine coding frameworks (e.g. whether codes could be collapsed, split or removed). Identifying infrequently occurring codes can also provide insight by highlighting uncommon ideas, information or special cases. CAQDAS allows for the exploration of code frequency similarly to word frequency described above, but also enables more sophisticated exploration of how the coding framework is expressed between units of analysis or attributes.
5. *Code retrieval:* This function of CAQDAS allows the researcher to gain an overall sense of the coding framework that is developing or has been fully developed during analysis. Code retrieval displays the data segments that correspond to each code to be surveyed, further enabling the process of coding refinement and the development of overarching themes. Using coding retrieval can be useful in narrowing down the codes, as well as grouping codes onto higher order themes. Checking segments of data for fit within the particular code can also be expedited by code retrieval in CAQDAS, including by multiple coders at the same point in time.
6. *Coding co-occurrence:* CAQDAS allows for immediate and seamless generation of visual displays and statistics that can aid the researcher in understanding patterns in the data. O’Kane et al. (2021) highlight dendograms (clusters of co-occurring codes), conceptual maps (plotting codes using multidimensional scaling) and link displays (mapping linkages between codes) as potentially useful in this process. These visual representations can illuminate relationships and generate output that provide a sense of the statistical or quasi-statistical relationships between codes within the dataset.

It is worth reiterating that the above techniques proposed by O’Kane et al. (2021) do not provide an exhaustive or prescriptive list of CAQDAS features and how they should or can be used. Indeed, such a list would be anathema to the process of qualitative inquiry and its constellation of approaches and expressions. Instead, the above techniques demonstrate the capacity of CAQDAS packages to facilitate, expedite and provide value for the qualitative researcher during the analysis process.

### Selecting a CAQDAS Package

The process of deciding whether or not to use CAQDAS, which package to use and how to use it can be fraught. While CAQDAS may be similar in some features of coding, each package offers minor differences that may grant unique affordances or constraints onto the research process. Yet most importantly, it is critical that researchers do their due diligence in learning how to use the software. This can include understanding the affordances and limitations of each

package, trialing their free versions (if offered) first, and investigating whether their institution provides technical and/or financial support for that particular software. Of course, researchers must first and foremost question the appropriateness of the software to their process of ‘seeing and knowing’ phenomena, answering the research question(s) and presenting the findings in a manner that supports the methodological tradition they have chosen.

Two of the most popular and accessible CAQDAS packages, NVivo and Atlas.ti, are particularly amenable to analysis that is rooted in a grounded theory perspective (Dalkin et al., 2021; Maher et al., 2018). This means that these packages are geared toward coding as the key pathway toward insight; an underpinning that is highlighted by the six techniques outlined above, and more broadly by their code-based inquiry, search and visualization capabilities (O’Kane et al., 2021). However, CAQDAS packages, including NVivo and Atlas.ti, can be used with a variety of theoretical perspectives and for a variety of purposes including literature organization and review, and even mixed-method approaches.

NVivo and Atlas.ti also provide a data trail and allow coding directly from the original form without the researcher having to transcribe video or audio materials for coding (Belk et al., 2012). Thus, when researchers click on codes, they would be taken directly to the audio of video material rather than to the transcript as the context. This option can be very useful to researchers that have limited time in transcribing materials to text format, supports them in avoiding losing important detail during the transcription steps, and allows them to stay close to the data and participants’ voices.

In terms of decision-making around the multitude of (ever evolving and emerging) CAQDAS packages, it is worth noting that NVivo is widely used, familiar to many researchers, and has arguably the most well-developed suite of features with collaborative team capacity. Other CAQDAS systems lack some of the capability of NVivo, but can be more cost effective, accessible or conducive to a particular project’s aims or researcher’s individual processes. For instance, MAXQDA may not have the word-processing look and feel of NVivo that makes it intuitive to use, but offers a unique architectural design of accessing and working with codes and memos that can have implicit effects on the way researchers engage with their data. For instance, MAXQDA’s interface allows for codes and memos to be created and shown together at the left margins of the data, and can motivate the researcher to continuously interact and stay close to their data. Methodological approaches of coding and memoing are important criteria to consider when evaluating packages. Unfortunately, it would be difficult to list further differences between CAQDAS packages and their features given the fast-paced updates in software technology. In short, determining the preferred CAQDAS system to use for a project is a matter of not only methodological fit, but platform accessibility and researcher preference, which will be largely subjective.

## DOWNSIDES OF CAQDAS

Thus far, the benefits of employing CAQDAS in qualitative analysis – particularly when coding is a key activity – have been explored. However, CAQDAS, and the consequences of using this technology, are not without criticism. A key assumption of a qualitative, inductive approach to analysis is that phenomena must be interacted with and experienced within the social and environmental context to produce meaningful insight (Douglas and Nil Gulari,

2015). It has been argued that interaction with digital tools can constrain this contextual and relational processing in favor of more analytical and visual thinking.

Indeed, design research highlights the limitations of computer-mediated design regarding reflexivity, persistence and multiple interpretations (Lawson, 2006). This can be less of an issue from certain theoretical perspectives in which relatively structured analytical approaches are employed (e.g. grounded theory and a coding-and-categorization scheme), but more of a potential downside when particularly reflexive and intuitive approaches are required (Pratt, 2009). It can hamper hermeneutic, phenomenological and imaginative sorts of interpretations that may lead to deeper understanding of the phenomenon to make major impact and provide breakthrough theoretical advancements in the field (Belk et al., 2012). The technological affordances of CAQDAS encourage the researcher to take transcript texts at face value and look for literal similarities across texts without their contextual background. In doing so, one may fail to appreciate the deeper (and particularly hidden) complexities.

A further criticism of CAQDAS is that it increases the distance between the researcher and the data, particularly participants' voices and experiences. With insight being key in qualitative work, having distance from a particular cultural phenomenon or communal site can be harmful. It can be argued that even manual coding of transcribed data can render dynamic social phenomena flat and dull, and that ideal processes for certain theoretical perspectives involve live coding by hand or direct from primary audio or visual sources (Saldaña, 2016).

On a more practical level, CAQDAS systems can render the coding process almost too effortless or too effortful. First, such simplicity of code creation within CAQDAS systems can lead the researcher to over-code, lose sight of the meaning within a large number of codes, or over-emphasize the importance of frequently occurring codes (Maher et al., 2018). In particular, more tenuous links, novel ideas, unexpected insights or special instances within the data can become lost within the data if they are more challenging to fit into the structured coding generally favored by CAQDAS (Elliott, 2018). Second, although software packages come with detailed tutorials, the serious assumption is that the researcher has advanced computer skills, which may not always be the case. Learning a CAQDAS package can be time-consuming and overwhelming, especially for the novice researcher or those with limited technical computer skills.

## CONCLUSIONS AND MOVING FORWARD

The key message is that, unlike statistical software, the main function of CAQDAS is not to analyze data but rather to aid the analysis process, which the researcher must always remain in control of. In other words, researchers must equally know that no software can analyze qualitative data – CAQDAS are data-management packages, which support the researcher during analysis.

Indeed, CAQDAS does often produce interesting visualization of the qualitative findings through charts and graphs. These infographics can be valuable for clear and usable communication of research results in managerial presentations, which would be as valuable as the results themselves. However, qualitative research requires deep and considered exploration of rich, dense data to produce meaningful findings and theoretical implications. Regardless of the theoretical approach guiding analysis, there are no shortcuts to insight when working with

qualitative data. The researcher must carefully hone their reflexive skills over time to ensure their responsiveness to the demands of differing research questions and forms of data.

Technology offers support in the qualitative researcher's quest for insight – from simple word processing and spreadsheeting systems to more sophisticated CAQDAS packages. In this chapter, we have considered CAQDAS due to its increasing ubiquity, collaborative functionality and ability to enhance the transparency and credibility of qualitative analysis. CAQDAS is particularly useful when engaging in data reduction processes, particularly in coding. Features such as text, code retrieval and word frequencies allow for speed and ease of coding, while query and visualization tools allow for seamless mapping of emerging code frameworks that can inform further insight (O'Kane et al., 2021). It is also worth noting that CAQDAS provides a coherent and responsive ecosystem in which to work with digitally derived datasets – e.g. information scraped from social media – which is of increasing availability and value to researchers (e.g. Schöps et al., 2020).

### **Implications for Novice Researchers**

We recommend that the novice researcher should prioritize their development as an expert in their field of research, theoretical perspective(s), and ways of understanding and working with data prior to adopting CAQDAS – perhaps even beginning this process manually – to enhance sensitivity. Despite the value of CAQDAS as a means to collect, store, manage and analyze qualitative data, it is important for researchers to consider that CAQDAS remains just one tool (amongst many) in their analytical toolkit. The qualitative researcher remains the main conduit for insight, and the use of CAQDAS does not reduce their role or automate their decision-making. Based on this, a recommendation for novice researchers is to learn to analyze initially by employing intuitive forms – perhaps even outside of CAQDAS altogether – to avoid being seduced or sidetracked by the software's myriad and structured features. As qualitative analysis will inevitably involve multiple rounds of coding or annotation, subsequent rounds of immersion can then explore the use of CAQDAS with greater sensitivity to the value of the platform and features, creating a manual and technologically supported bricolage of analysis capability.

We encourage data analysis to start whilst in the field, with researchers jotting down notes and initial insights early in an investigation. These initial insights gathered at the start of entering a cultural site become crucial to capture when it comes time for data analysis. Such early thoughts and hunches can be saved to keep the researcher organized in managing the research design, the field data, observations, initial and advanced analysis, screenshots from social media, downloaded files (e.g. audio, video, correspondences), rudimentary codes and more advanced conclusions and reports. Having an organized and systematic approach to data collection and analysis can make life much easier whilst the researcher is in the field.

Researchers should also choose a qualitative data analysis method and/or package and learn how to use it even before collecting data. It is always best to learn a CAQDAS package, not when the researcher is awash in the field amongst all of the rich data being collected, but when they have enough time to consider how it works and how it can benefit the data analysis process. In the end, the choice of conducting analysis using CAQDAS will depend on the scholar's style and approach with data. The biggest concern researchers should have is to avoid the software creating distance between the researcher and the data, and/or limiting the rich etic interpretation expected from qualitative research.

## NOTE

1. <https://atlasti.com>; <https://www.maxqda.com>; <https://lumivero.com/products/nvivo>; <http://www.researchware.com/products/hyperresearch>; <https://archive.mpi.nl/tla/elan>; <https://www.dedoose.com>; <https://www.transana.com>

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## 38. Telling stories with textual and visual analyses

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### INTRODUCTION

Qualitative research provides important opportunities to explore complex cultural contexts and investigate multiple perspectives on an assortment of phenomena, at varying levels of analysis (Akaka and Schau, 2023). Visual and textual materials are ubiquitous, as they emerge through the investigation of daily lived experiences and historical narratives, as well as ongoing discourse between individuals and among collectives online and offline, in both private and public forums. Virtually any visual or textual material can be incorporated into a variety of market- and consumer-related qualitative research projects. The infinite opportunities to collect these types of data make it difficult to discern what to include in a particular qualitative research study, and how to analyze varying sources and forms to provide novel insights and propose a clear contribution to a given field of study.

The purpose of this chapter is to discuss critical factors in the analysis of visual and textual materials and outline a process through which these types of data can provide empirical evidence that help to explain dynamic and emerging social phenomena. We underscore the value of images and language in enabling researchers to conduct multifaceted studies (Chowdhury, 2015) and tell compelling stories through symbolic representations and verbatim language of individual and collective voices. To this end, we first provide an overview of how visual and textual materials are used in qualitative research through a variety of methods and materials found in, for example, interview transcriptions, field notes, marketing communications, articles, books and online and offline dialogue, as well as visual materials, such as images, films, photographs and advertisements. We highlight key considerations in analyzing such data, including both unit and level of analysis, leveraging emic and/or etic perspectives, and zooming in and out on specific phenomena in complex contexts.

We offer a process for qualitatively analyzing textual and visual materials to unravel the tapestry of complex cultures and systematically making sense of dynamic social structures. We argue that qualitative analyses of data begin with preparation and research design and involve collection and organization of textual or visual materials, or both. The analysis of data is an iterative process that requires flexibility and willingness to allow data to speak through the initial design. Interpretation and visualization are critical for connecting the dots between the findings and the field of research, and underscoring the contribution to our collective knowledge base. We wrap up the chapter by discussing how the textual and visual artifacts that emerge from our research in the form of academic journal articles, book chapters and popular press amplify the narration of lived experiences and complexities of contexts through which people's lives are lived, markets are formed and society is shaped.

## USING TEXTUAL AND VISUAL MATERIALS IN QUALITATIVE RESEARCH

Qualitative research has a long history of analyzing textual and visual materials to understand past events and civilizations (Brinkmann et al., 2014) as well as current community dynamics and lived experiences (Denzin and Lincoln, 2008). In marketing, qualitative research provides a means for deep investigation of why and how value is created through markets.

Textual and visual materials are included in studies that explore phenomenological experiences as well as the contexts through which they occur. A variety of qualitative methods, including ethnography (Schouten and McAlexander, 1995) and netnography (Kozinets, 2019), case studies (Chandler et al., 2019) and historical analysis (Akaka et al., 2022), involve both textual and visual data. Furthermore, these data and methods leverage the richness of language and imagery to study a plethora of market-related phenomena. The aim of this chapter is not to review specific studies, but to provide background into the types of qualitative analysis that can be used to gain insight into dynamic phenomena embedded in complex contexts. We also propose an extended approach to data analysis that can help researchers to not only identify patterns in textual and visual data, but also to tell compelling stories that amplify the voices of the informants and underscore the complexity of the contexts in which they reside.

### TEXTUAL DATA IN QUALITATIVE RESEARCH

Textual analysis involves the investigation of written words, but their source can be written or spoken. Although quantitative content analyses of text are useful for providing aggregate level sentiment based on positive and negative vocabulary, nuances of these text are difficult to assess without contextual considerations (e.g. to detect sarcasm). Furthermore, quantitative word counts inform common language that describe events, trends or institutional norms, but qualitative assessment is often required to decide which words to include in the counts, and how the patterns are interpreted (e.g. Humphreys, 2010; Luri et al., 2023; Warden et al., 2017). Qualitative textual analyses also provide added insights into the cultural context through which words are used, and can include the study of unidirectional (oral narratives) as well as bidirectional (service scripts) messages, and reveal individual experiences as well as collective perspectives (e.g. press releases). Linguistics and conversational analyses provide avenues for analyzing qualitative data with distinct foci on the how words are used to create meaning (linguistics) and how they are used to relate with others (conversational analyses).

#### **Learning from Linguistics**

Linguistics is the scientific study of language and its structure, including the sounds (phonetics and phonology), meanings (semantics and pragmatics), grammar (syntax and morphology) and social aspects of language use (sociolinguistics). Linguists analyze the patterns and systems of human language to understand how languages are structured, how they evolve over time, and how they are used in communication. Linguistics aims to uncover the underlying principles that govern language, exploring both the universal properties shared by all languages and the specific characteristics of individual languages. It examines the rules that speakers unconsciously follow when producing and comprehending language (Heigham and Croker, 2009).

Linguistics employs various methods, including data collection from native speakers, linguistic analysis, experimentation and computational modeling. The findings from linguistic research have applications in fields such as education, language teaching, translation and interpretation, natural language processing, speech recognition and social and cultural studies, among others.

Because language underlies multiple modes of communication, linguistics can provide significant insights into markets and market actors.

1. *Consumer Behavior and Perception.* Linguistic analysis can provide insights into how consumers perceive and interpret marketing messages, product names, slogans and advertising campaigns.
2. *Branding and Positioning.* By considering linguistic factors such as phonetics, semantics and cultural associations, researchers can examine how companies can create brand identities that resonate with target markets and evoke desired emotions or perceptions.
3. *Cross-Cultural Communication.* Understanding the linguistic and cultural nuances of different markets is crucial for navigating the challenges of cross-cultural communication, content localization and effective communication with diverse audiences. Such understanding enables companies to tailor their messages, tone and imagery to specific cultural contexts, and to avoid potential pitfalls or misunderstandings.
4. *Market Segmentation.* Language can serve as a demographic indicator, allowing segmentation of markets based on linguistic factors such as language preference, dialect or regional variations. This information can be valuable for targeting marketing campaigns and tailoring products or services to specific linguistic communities.
5. *Customer Feedback and Sentiment Analysis.* Linguistic analysis techniques, such as natural language processing (NLP), can be applied to customer feedback, reviews and social media comments. By analyzing the language used by customers, researchers can gain insights into sentiment, identify emerging trends and uncover valuable feedback for improving their products, services or marketing strategies.
6. *Language Localization.* When expanding into new markets, linguistic research is crucial for localization efforts. It involves adapting marketing materials, websites, product descriptions and user interfaces to the target language and culture. Understanding the linguistic preferences and cultural sensitivities of the target market helps companies establish a strong local presence and connect with customers effectively.

In summary, linguistics provides a deeper understanding of language and its impact on consumer behavior, perception and cultural context. By leveraging linguistic insights, researchers can help businesses develop more effective marketing strategies, enhance customer engagement and thoughtfully navigate diverse markets.

### **Comprehension through Conversation Analysis**

Conversation Analysis (CA) is a research approach within the field of sociolinguistics that examines the structure, organization and dynamics of naturally occurring conversations. It focuses on the detailed analysis of spoken interactions to uncover the underlying rules, patterns and practices that govern conversation. CA aims to understand and provide insights into how participants in a conversation co-construct meaning, manage turn-taking, repair communication breakdowns and accomplish social actions and goals through talk. CA is influenced

by the broader theoretical framework of ethnomethodology (Sidnell, 2011), which seeks to understand the methods and practices through which social order is accomplished in everyday interactions. CA examines the ways in which participants navigate social norms, conventions and expectations through their talk. It explores the techniques used to signal problems, request clarification and provide corrections to ensure mutual understanding (Ten Have, 2007).

By closely analyzing recordings or transcripts of naturally occurring conversations, CA provides detailed insights into the structure, rules and patterns of spoken interactions. It has been applied to various contexts, including ordinary conversations, institutional interactions, customer service encounters, medical consultations and courtroom discourse. CA findings have implications for fields such as communication, sociolinguistics, anthropology, psychology and applied linguistics (Sidnell, 2011). It can provide valuable insights into markets and consumer behavior by studying the dynamics of spoken interactions and the structure of conversations:

1. *Customer-Service Interactions.* CA can analyze these interactions to identify patterns of communication, including turn-taking, repair sequences and preference structures. By examining these patterns, researchers can gain insights on customer interactions and develop strategies to enhance the customer experience.
2. *Sales and Negotiation Strategies.* CA can shed light on the strategies employed by salespeople and negotiators during interactions with customers. By examining the sequencing, use of persuasive techniques and turn-taking patterns, researchers can understand effective communication strategies and identify successful sales techniques.
3. *Marketing Research Interviews.* CA can analyze how consumers express their opinions, preferences and experiences through interviews. Researchers can identify recurring themes, patterns and discursive practices that can inform market segmentation, product development and marketing strategies.
4. *Advertising and Consumer Response.* CA can analyze how consumers respond to advertising messages in natural conversational settings. By studying focus groups, online discussions or social media interactions, researchers can gain insights into how consumers interpret and discuss advertisements and identify key themes and responses.
5. *Social Media Interactions.* By studying discourse patterns, sentiment analysis and emerging themes on social media platforms (e.g. customer reviews, comments and discussions), researchers can gauge public opinion, track consumer sentiment towards their products or brands and respond effectively to customer feedback.
6. *Consumer Decision-Making.* CA can explore the conversational processes involved in consumer decision-making, such as discussions among family members, friends or online communities. By analyzing the structure, turn-taking and argumentation patterns, researchers can understand how consumers deliberate, negotiate and influence each other's choices, which can inform marketing strategies and product positioning.
7. *Brand Communities and Online Forums.* CA can examine the interactions within brand communities or online forums to understand how consumers engage with brands, share experiences and form communities around specific products or services.

CA offers a detailed understanding of the dynamics of communication in various market-related contexts. By studying spoken interactions, researchers can gain insights into consumer behavior, preferences, decision-making processes and communication strategies, which can inform marketing campaigns, product development and customer relationship management.

## VISUAL DATA IN QUALITATIVE RESEARCH

Despite the imposing tendency of published research to favor the verbal or textual, visual data plays a significant role in qualitative research (Bassett, 2011), offering unique insights and enhancing the understanding of market and market-related phenomena. Visual data can be collected through various methods, including photographs, videos, drawings, maps, diagrams, observations and other artifacts. They provide researchers with additional sources of information that complement textual data. Visual data can capture aspects of the research context, participants' experiences, physical environments and nonverbal cues that other data collection methods may not fully capture. Visual data can enable participants to express their experiences, perspectives and emotions in ways that may be difficult to articulate verbally. They enhance the richness and depth of qualitative descriptions by allowing researchers to document and describe visual aspects of the research setting, objects, interactions and spatial arrangements. Visual materials can provide vivid and contextualized descriptions of behaviors and other observational data that supplement textual accounts, providing a more comprehensive understanding of the research phenomenon (Banks, 2018).

Visual methods, such as photo-elicitation or drawing exercises, allow participants to communicate their thoughts and feelings visually, providing deeper insights into their subjective experiences. Visual data can be analyzed using various qualitative analytical approaches. Researchers can use visual analysis techniques to identify patterns, themes and meanings in visual representations. Visual data can be subjected to coding, thematic analysis, content analysis or discourse analysis to uncover underlying themes, relationships and interpretations. Incorporating visual methods in qualitative research can enhance participant engagement and empowerment. Participants can actively contribute to the research process by creating visual representations, co-analyzing visual data and providing interpretations. These methods can facilitate participatory research approaches and foster collaboration between researchers and participants (Mason, 2005). Visual data can be used for triangulation, enriching the validity and reliability of qualitative research. By comparing and contrasting visual data with textual or other forms, researchers can corroborate or challenge findings, explore inconsistencies and ensure a more robust interpretation of the research phenomenon.

Visual data can be effectively used to enhance understanding of markets and consumer behavior in qualitative research:

1. *Consumer Insights.* Visual data, such as photographs or videos, can capture consumers' interactions, experiences and behaviors in real-world contexts and provide nuanced insights into how consumers engage with products, brands and retail environments. Observing visual cues, body language, facial expressions and spatial arrangements can help researchers understand consumer preferences, decision-making processes and emotional responses.
2. *Product Design and Packaging.* Visual data can be instrumental in evaluating and improving product design, packaging and visual aesthetics. Researchers can use visual methods to gather consumer feedback on product prototypes or packaging designs, allowing them to assess visual appeal, usability and perceptions. They can also identify design elements that attract consumers, evoke emotions or align with brand identity.
3. *Store Layout and Visual Merchandising.* Visual data can assist in analyzing store layouts, visual merchandising techniques and the overall shopping environment. By examining

photographs or videos of retail spaces, researchers can understand how consumers navigate and respond to different store designs, product displays, signage and atmospheric elements. Visual data can reveal patterns of consumer attention, focal points and the impact of visual stimuli on purchasing decisions.

4. *Advertising and Marketing Communication.* Visual data can shed light on how consumers interpret and respond to advertising, promotions and brand visuals. Researchers can analyze advertisements, social media posts or user-generated content to identify themes, representations and brand associations that resonate with consumers. Visual data can uncover engagement with visual storytelling, symbolism and aesthetic appeals.
5. *Online and Social Media Interactions.* Visual data from social media platforms, such as images, videos or memes, can provide valuable insights into consumer behavior, trends and online communities. Researchers can analyze visual content shared by consumers to understand their self-presentation, brand affiliations, product experiences and influencers' impact, as well as identify emerging visual trends, visual user-generated content and consumer-generated visual narratives.
6. *Packaging and Labeling Compliance.* Visual data can aid in evaluating compliance with packaging and labeling regulations. Researchers can analyze visual representations of packaging to ensure accurate and transparent communication of information, such as ingredient lists, nutritional content, certifications and health claims. Visual data can help identify potential discrepancies or misrepresentations in packaging and labeling practices.
7. *User Experience and Interaction Design.* Visual data can inform the design and evaluation of digital interfaces, websites, mobile applications and interactive technologies. Researchers can capture users' interactions, gestures and visual attention through screen recordings or eye-tracking data. Visual data analysis can identify usability issues, navigation patterns and design elements that shape the user experience.
8. *Market Evolution.* Imagery and observational accounts of market-related artifacts provide added understanding to how markets emerge and evolve. These data can showcase how cultural artifacts become commodified and how through this process new cultures form.
9. *Brand Building.* One major market symbol that companies rely on, and that researchers study, is brands. These are often represented by visual imagery, such as a logo, but the weight of the brand extends far beyond this symbol. Brand-based visual materials can include products (e.g. Apple), as well as services (e.g. Starbucks), and how marketers and consumers leverage these symbols to represent identity is at the heart of brand building. Visual materials can be used to study brand communities (Schau et al., 2009), as well as how brands are integrated into extended consumption journeys.

By incorporating visual data into qualitative research on markets and consumer behavior, researchers can gain a deeper understanding of consumers' perceptions, experiences and interactions in various market contexts. Visual data adds a layer of richness and context to qualitative findings, helping companies make informed decisions regarding product development, branding, marketing strategies and customer experience improvements.

## KEY CONSIDERATIONS IN QUALITATIVE DATA ANALYSIS

### Socially Constructed Reality

Qualitative research is based on the premise that meaning is not absolute or objective, but socially constructed by individuals in interaction with the world around them (Merriam, 2002). There is no one reigning reality or a fixed locatable truth. The best a researcher can do is faithfully render a specific reality in a given temporally bound context through rigorous data collection, analysis protocols and artful storytelling (Akaka and Schau, 2023).

### Unit and Level of Analysis

The unit of analysis in research refers to the fundamental entity or element examined and analyzed in a research study. Choosing the unit of analysis depends on the research objectives, the nature of the research question and the level of analysis required to answer the research question effectively.

The unit of analysis can vary depending on the discipline and the nature of the research. An individual-level analysis means the unit of analysis is the individual person. In this case, data are collected and analyzed at the level of individual participants, focusing on their characteristics, behaviors, attitudes or experiences. A collective or organizational-level analysis focuses on a specific social group, such as teams, departments, companies or other organized entities, examining their structures, dynamics, processes or outcomes. A text or document-level unit of analysis (e.g. books, articles, speeches, social media posts or documents) may involve examining the content, themes, discourse or language patterns within these entities. A geographic-level unit of analysis focuses on a specific geographical area, such as a city, region or country. Research may focus on analyzing demographic, economic, social or environmental characteristics at the geographic level. Lastly, a time-series analysis refers to the unit of analysis as a time span. Research may involve analyzing data collected over multiple points to understand patterns, trends or changes over time (Yurdusev, 1993).

The choice of the unit of analysis is crucial as it determines the scope and level of detail of the research findings. Researchers need to carefully define and justify their choice to ensure it aligns with their research objectives and allows for meaningful analysis and interpretation of the data. It is important to note that a research study can explore multiple units of analysis. For example, it might analyze both individual-level data and group-level data to understand the relationship between individual behavior and group dynamics (Wallerstein, 1994).

### Emic and Etic Perspectives

The concepts of ‘emic’ and ‘etic’ originate from anthropology and are used to describe different perspectives or approaches in studying cultures, behaviors and phenomena. The emic perspective focuses on understanding a culture or phenomenon from within, relying on the internal viewpoints, meanings and categories significant to the individuals or groups being studied, which emphasizes cultural relativism and the importance of understanding phenomena in their own cultural context. It involves examining and interpreting cultural phenomena and aims to capture the insider’s point of view, uncovering the culturally specific concepts, values and beliefs that shape their behavior and understanding of the world. The etic perspec-

tive focuses on analyzing cultures or phenomena from an external or observer's viewpoint. It involves applying concepts, theories and analytical frameworks that may be derived from outside the culture or context being studied. The etic approach aims to identify and analyze universal patterns, cross-cultural comparisons and general principles that can be used to explain and understand cultural phenomena (Holmes, 2020).

The emic perspective seeks to understand a culture or phenomenon from an insider's perspective, while the etic perspective examines the culture or phenomenon from an external or observer's viewpoint. Both perspectives are valuable and can complement each other in providing a comprehensive understanding of complex cultural and behavioral phenomena. However, we aver that storytelling is best when the stories are told through the perspective of the participants at the operating unit of analysis, and analytically abstracted to a set of insights that can be transported to other contexts (Lather and Smithies, 1997).

### **Zooming In and Out on Social Phenomena**

Consideration of different units and levels of analysis along with both emic and etic perspectives highlights the breadth and depth that qualitative analysis, both textual and visual, can cover. When micro-level phenomena are central to the investigation, individual experiences – including emotions, perspectives and practices – can serve as the unit of analysis. However, the cultural embeddedness readily apparent in textual and visual analyses requires acknowledgement of the context of context that frames phenomenological experiences (Askegaard and Linnet, 2011). In other words, although researchers are focused on a unit of analysis (e.g. a practice), in a particular level of analysis (e.g. individual), they cannot ignore the situational, social and/or cultural context that frame the phenomena of interest. They also cannot consider every aspect of context as central to their study, or they will dilute the investigation and muddy the waters of understanding. To avoid this, researchers can recognize the complexity of the context (Akaka et al., 2013) that embeds the phenomenon by describing the cultural context and establishing the scope of the study – e.g. local community, organization, subculture, national culture, global culture. In this way, researchers zoom out to describe and delineate the context of study from the rest of the world and zoom in to examine and explain the phenomena within it.

### **Extended Data Analysis Process**

Data analysis is often described as a step-by-step process for organizing, categorizing and classifying information after it has been collected. In qualitative research, the analysis of data often occurs simultaneous to the collection of data, and researchers cycle between data and theory to reconcile differences between research questions, theoretical explanations and data outcomes. Saturation is often recognized as a threshold for sufficient data collection, but how that point is reached is ambiguous and often requires initiation of the data analysis process to achieve (Gummesson, 2005). In addition to the iterative nature of data collection, organization and analysis, preparation is required to design a study that addresses important theoretical and practical questions and is reasonable in scope and scale. Qualitative research can easily run wild without clear boundaries and specific consideration for the type of data (both textual and visual) that might be needed to address a market-, organization- or consumer-related problem.

To extend the process of data analysis for textual and visual materials we propose that multiple iterative and overlapping stages are needed:

1. *Preparation.* When designing the study, consider not only what types of data (textual or visual) to collect but also how they will be analyzed. Consider the theoretical lens, scope of the study or specific phenomena of interest and plan for data collection and analysis accordingly. Develop initial research questions to guide the data collection and analysis.
2. *Collection.* Identify sources of textual and/or visual data and estimate amount of data and/or time it will take to collect data. Gather textual and visual materials in a systematic manner but pause during collection to ensure the appropriate data are being collected and identify gaps and seek out additional sources as needed.
3. *Organization.* Consider the initial research questions and guiding theories and create categories, classifications and themes based on your intended questions or theories. Pause to consider the alignment between your data and your initial research questions.
4. *Iteration.* Assess the alignment between your research questions and the textual and visual data collected. If there is a misalignment, reconsider the research questions and reframe them as needed. In some cases, the questions may be too broad or too narrow for the original scope; in other cases what you see in the data may not align with the theory.
5. *Analysis.* When the research questions and data structure or organization align, researchers can scrutinize the textual and visual data and arrange the data to map onto the data schema. During this process, if there are many gaps in the data or the data do not fit the theory or questions, iteration may be needed. The goal of qualitatively analyzing textual and visual data is to create a cohesive structure for unstructured data that accounts for the complex social and cultural context from which the materials are derived.
6. *Interpretation.* To make a theoretical contribution to a body of literature, it is not enough to organize and analyze the data to answer the questions. Researchers should take an additional step to develop a framework such as a typology, process model or network of relationships that addresses the stated research question, and also makes clear connections to prior research and a particular body of work. This step establishes the contribution of the research to theory and to a field of study. This phase also allows for the recognition of implications for managers, consumers and public policy makers.
7. *Visualization.* Much like visual materials can provide semiotic insight into social and cultural meanings, visualization of typologies and processes can aid in understanding of the contribution and elevate the explanatory power of theoretical advancements.

This extended process for data analysis establishes a foundation for a qualitative study that can explore evolving lived experiences and the dynamics of the contexts in which those experiences emerge. By considering an extended process of analysis for textual and visual data in qualitative studies, researchers can be more purposeful and selective about what they include in their data sets and more systematic about how the data are gathered, organized and analyzed. The critical considerations presented above also help authors to focus in on a specific phenomenon as their unit of analysis, while recognizing the complex context in which that phenomenon resides. This recognition of the context of context (Askegaard and Linnet, 2011) and its complexities (Akaka et al., 2013) provides added depth to the stories these textual and visual data tell.

## Narrating Lived Experiences and Complex Contexts

Visual and textual materials represent lived experiences and reveal complexities of culture that change and are changed through actions, interactions and relationships that scaffold markets and society. These data require an extended analysis process that starts with preparation to identify specific sources of relevant data that can aid in addressing initial research questions. This process is iterative, and researchers should seek to allow the stories of their informants to shine through by allowing the language and imagery to inform the development of the data structure. The outcome of the analysis and interpretation should make strong connections back to prior literature or theories to underscore the contribution of the study.

What is unique about analyzing textual and visual data is that, through analysis and interpretation of these materials, the stories of individuals and communities can be shared. The voices of informants become amplified through the analysis and publication of textual data. Direct quotes can reveal unique linguistic undertones and verbatim discourse can provide insights into relationships and cultural norms. Photo representations portrayed in publications provide unique opportunities for readers to visualize symbols and meanings that would be difficult to depict in words. Cultural complexities can be codified in ways that are hard to capture without imagery.

Furthermore, direct integration of textual and visual data can be powerful tools for communicating research findings to diverse audiences. Textual descriptions, such as interview data or field notes of personal experiences can add depth to emotional responses to specific events. Visual representations such as photographs, videos or visualizations, can capture attention and convey complex information effectively. Visual data can also enhance the accessibility and impact of qualitative research findings by presenting them in visually engaging and compelling formats (Bennett et al., 2019).

It is important to note that working with textual and visual data requires ethical considerations, such as obtaining informed consent, ensuring confidentiality and addressing potential cultural sensitivities. Researchers should also be mindful of the limitations and challenges associated with analyzing textual and visual data, including the subjective nature of interpretation and the potential for bias. Telling stories of experiences, communities and cultures requires care on the part of the researcher to ensure that voice of the informant be preserved but the informants themselves are protected. In this way, textual and visual analyses can provide valuable windows into different worlds, through which the lessons learned from the research can reveal the uniqueness of lived experiences, highlight the importance of collectives in value creation and provide a pathway forward for increasing empathy towards others.

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## 39. Making context matter even more: tools for leveraging contexts for insights

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### INTRODUCTION

In Chapter 2 of this volume, we discussed the importance of selecting contexts for theoretical and substantive insights. What that chapter did not do is provide crucial tools for leveraging contexts selected for study. The aim of this chapter is just that: to offer concrete tools on how to go about leveraging contexts for theoretical as well as substantive insights. The tools we discuss in this chapter (focus on a construct, a process, a group or an extreme dimension of a social phenomenon) reflect discourse in the social science classics. For example, Mauss developed the concept of total institution to understand the substantive phenomenon of gifts (2005/1924). Hubert and Mauss developed the concept of sacrifice in an attempt to identify the fundamental explanatory components of religion and devotion (1964/1898). Weber relied on Calvinists (and Calvinism; 2010/1905) to understand capitalism as an emerging enterprise. Classic work of Durkheim on anomie was borne out of the substantive need to explain the emerging phenomenon of suicide in modernizing France (2006/1897). In each case, these studies opened new theoretical domains, mapped out and distilled insight into phenomena of interest, integrated and differentiated the theoretical domain, and stimulated critical discourse by advocating a specific viewpoint and defending it from alternatives – all hallmarks of theoretically effective use of contexts (MacInnis, 2011).

Before going further, it is valuable to revisit the term ‘context’, broadly conceived as ‘the surroundings associated with a phenomena [sic] which help to illuminate that phenomena [sic]’ (Cappelli and Sherer, 1991, 56). That is, a context is a holistic environment within which phenomena are studied (Stremersch et al., 2023). Askegaard and Linnet observe, ‘the orientation of much CCT research has been towards exploring a variety of contexts in which the consumer has been “discovered” as an agent who draws upon market-based resources in constructing his or her own identity’ (2011, 383). Context is also not a singular, physical setting, but is multifaceted and can be examined at various levels of analysis, from micro to macro. Micro-level contexts are those that utilize a phenomenological focus on individual experience or life worlds, such as buyer-seller dyads, a staple of B2B as well as mainstream B2C research. However, we can also examine contexts at meso levels, as occurs in B2B work (Helkkula et al., 2018).

It is critical to recognize that any ‘context’ is always part of some broader explanatory context, just like layers of an onion. Awareness of relationships between the layers of a context, a skill ‘sometimes described as context-awareness’ (Hasbrouck, 2017, 17), implies scholars need to be aware and recognize the ecosystem in which any consumption context is embedded, what Askegaard and Linnet (2011) refer to as the ‘context of contexts’. Similarly, Dilley writes about internal and external contexts in attempting to articulate a means of creating ‘a connection between one domain of phenomena ... and another’ (Dilley, 1999, 12). Many studies in

CCT focus on these internal contexts (Askegaard and Linnet, 2011), with an eye on exploring how ‘thematic meanings stand in relation to each other and that the total quality of experience emerges from such interrelationships’ (Thompson et al., 1990, 359). The external context for these thematic meanings may be a collective of some kind, a sociohistorical pattern or an ideology. It is in fact this external context that inspires the qualifier of ‘culture’ in CCT research. It provides an explanatory tool for understanding consumption, and is important because since consumers are always embedded in their own habitus, which Bourdieu (1984) defines as a pre-conscious framework or ‘generative mechanism’ that makes consumers ineffective critical commentators on the sociohistorical drivers of their own behavior. Context choices therefore reveal some theoretical arguments over others, as we explain below.

## SELECTING THE ARGUMENTS TO FOREGROUND OR BACKGROUND

Context choices favor foregrounding or backgrounding particular theoretical arguments that then give shape to theoretical and substantive insights (Alford, 1998). At the same time, theoretical choices favor contextual choices. Through choice of context, some constructs, construct relationships, consumer groups and processes are made salient, while other latent aspects of contexts are left unexamined.

For example, researchers can foreground variations across spatial or temporal circumstances, sometimes also examining the interaction of spatial and temporal conditions with understudied consumers. Through a temporal examination of LARP (live-action role play) participants, Orazi and van Laer (2023) reveal the bleed from extraordinary experiences that participants feel when they return home. Parmentier and Fischer (2015) temporally investigate how fans can abandon a brand they avidly followed, leading to its destruction. Preece et al. (2018) examine how the James Bond brand endures temporally through adaptation across changing cultural and normative contexts. Relatedly, Molander et al. (2022) foreground heterogeneous consumer groups, to longitudinally examine change and continuity of a Swedish fashion brand.

Foregrounding spatial shifts, Appau and Crockett (2023) examine ‘transnational gifting’, which involves global migrants who reap benefits in terms of social capital when they distribute obligatory gifts to kin, when visiting their home countries. Not only does their work shed theoretical light on the Maussian gift concept; it also enriches our understanding of a macro-contextual phenomenon, family ties, in the context of enforced global mobility. Also foregrounding variations across spatial arrangements, Sharifonnasabi et al. (2023) introduce the concept of transnational market navigation, examining the strategies of globally mobile consumers who simultaneously engage with multiple cross-border markets. While foregrounding spatial arrangements, their research also makes salient an understudied consumer group – consumers who simultaneously work, live and consume in two or more countries. A consideration of the macro-contextual economic and political factors driving and shaping these behaviors could extend such work.

Researchers sometimes ask what can be learned from foregrounding contextual variations among consumers – examining understudied consumers’ responses or interplays among consumer groups. This might also include a foregrounding of historical, temporal and/or spatial themes. A signature value of what interpretive research offers is to unfold similarities and

differences among consumer groups in understanding complex, perplexing, thorny problems. Kravets and Sandikci (2014) examine newly middle-class Turkish consumers. Like their Euro-American counterparts, these consumers possess sophisticated knowledge of fashion and brands, and their market choices are reflexive. However, unlike Euro-American consumers with similar education and income, they are neither eclectic nor subversive in their consumption. Thus, mixing genres, deconstructing social stereotypes or engaging in oppositional consumption practices are not characteristic behaviors. Instead, they consume ‘within shared rules and standard sets of products’ reflective of propriety and ‘alignment with the middle’ (137). The authors explicate these distinctive characteristics with reference to the macro context of Turkey’s continuously transforming and unstable social structure.

Crockett (2017) investigates the African American middle class to understand how these consumers manage stigma against a backdrop of the sociohistoric patterning of consumption that both resists and reinforces structural racial inequality. Both papers enrich theory on the sociohistorical patterning of consumption, but also enrich substantive understanding of Turkish and American consumer culture, respectively. In Crockett’s case, he extends the work of sociologist Lizabeth Cohen (2003) on the politics of mass consumption in the US, which is relatively silent on the black middle class.

Eichert and Luedicke (2022) shed light on the complex lived experiences of gay men in Germany. In contrast to pioneering work in North America that examined the gay community as a cohesive subculture (Kates, 2002), Eichert and Luedicke’s findings emphasize what they call fragmented stigma – where the stigmatized group disintegrates into subgroups that pursue distinct and diverse consumption interests. Their conceptual model of consumption under fragmented stigma can help us understand why one subgroup of gay men might support a far right, antigay political candidate, while others might not. Velagaleti and Epp (2023) ground their analysis in interviews and observations of same-sex couples showing how they navigate a destabilized field with shifting rules for what is considered legitimate in the wedding market. Their research speaks to more fluid conceptions of gender than in previous work that assumes binary gender conceptions. Consequently, their study incorporates more nuanced perspectives on gendered capital (see also Peñaloza et al., 2023).

What researchers choose to foreground or background about contexts affects the story they tell. A number of interpretive perspectives can help frame contexts for impact. In the next (primary) section, we illustrate the utility of these tools by drawing selectively on published interpretive research primarily from the last decade.

## LEVERAGING SELECT PERSPECTIVES FOR THEORETICAL AND SUBSTANTIVE INSIGHTS

Table 39.1 provides a summary of some ways the choice of research contexts has enabled theoretical and substantive payoffs. It is loosely organized around select enabling interpretive perspectives, including isolating constructs, isolating process, isolating groups and going to extremes. We have already illustrated research that uses multiple interpretive perspectives in this chapter. We categorize these studies to illustrate perspectives rather than to compartmentalize the research efforts. Many times, research efforts include two or more enabling interpretive perspectives. That is, researchers might isolate a group to facilitate isolating a process which in turn might help identify a new construct.

*Table 39.1 Select interpretive tools for theoretical and substantive insights: examples published 2015–23*

Select Tool: Isolating Constructs	Study	Context	Primary Data Source(s)	Theoretical Insight(s)	Substantive Insights	Broad Theme(s)
Consumers Seeking Pain	Scott et al. (2017)	Tough mudders	Participant observation, interviews, photos, video and netnography	Performance of pain are responses to the alienated disembodied nature of elite work	Tough mudders seek spectacles of pain to get in touch with their bodies and manage their identities	Therapeutic Consumption
Vestaval Ritual	Bradford and Sherry (2015)	Tailgating at University football games	Ethnography	Commercial spaces are domesticated through vestaval ritual	Tensions between private and public use of space	Consumer Ownership and Sharing
Transnational Gift-Giving	Appau and Crockett (2023)	Ghanaian migrants' gift-giving	Interviews with Ghanaian gift-givers, photo and videography of gifts	Transnational gifts acquire meaning in lieu of global and local gift economies	Travelers' gift-giving in their home country is driven by recipients' notions of wealth in people and places	Globalization and Liquid Modernity
Permanent Liminality	Appau et al. (2020)	Pentecostal converts' consumption of religious services	Ethnography, participant observation and interviews with Pentecostalists	Consumers can exist in a state of permanent liminality	Pentecostal converts are stuck in-between zones of good and evil consumer desires	Globalization and Liquid Modernity
Fragmented Stigma	Eichert and Luedicke (2022)	Stigma management of gay men in Germany	Interviews, focus groups, archival/historical data, and participant observation	Stigmatized consumers fragment and develop varied stigma management strategies	German gay men not just one group; deal with stigma in varied ways	Consumers Managing Stigma

Select Tool: Isolating Constructs	Study	Context	Primary Data Source(s)	Theoretical Insight(s)	Substantive Insights	Broad Theme(s)
Forgetting	Marcoux (2017)	9/11	Souvenirs Long interviews, observation, and photography of 9/11 remembrances	The collective memory process of forgetting	Souvenirs help consumers forget traumatic events	Therapeutic Consumption
Repairing Defective Objects	Godfrey et al. (2022)	Repair of broken and or defective objects	Observation, interviews, and consumer reviews of shoe and bicycle repair	Process of repairing defective objects calibrates and aligns practices and object meanings	Conflicts between production, consumption, and repair hinder repair interventions	Sustainability
Governance of Household Waste	Cherrier and Türe (2023)	Household waste disposition	Interviews, in-home visits, observations, introspections, and archives of household waste in France	Governance structures influence disposition through waste responsibilization	Consumers' conflicts and tensions inhibit elimination, recycling and zero-waste	Sustainability
Delegitimization of Bullfighting	Valor et al. (2021)	News and blog debate over bullfighting	News, blogs, and reader comments about bullfighting	Pathic stigmatization can delegitimize consumer practices	Emotional demonization of bullfighting supporters in media makes bullfighting less acceptable	Consumer Movements
Facilitation of Microloans	Bajje and Rojas-Gaviria (2021)	Solicitations to supply interest-free loans to the poor	Interviewing, textual analysis, and participant observation of a microloan lender	Market intermediaries can foster affective responsibilization	Microloan firms dramatize stories of the poor to invite sponsorship of interest-free loans	Poverty
Female Roller Track Derby Participants	Thompson and Üstünler (2015)	Women's flat track roller derby	Interviews of track roller team members and fans	Subversive gender performances thrive due to ideological edgework	Women consuming roller derby resist its gender role Resistance subverting implications	Consumer Resistance

Select Tool: Isolating Constructs	Study	Context	Primary Data Source(s)	Theoretical Insight(s)	Substantive Insights	Broad Theme(s)
Females in a Male- Dominated Gaming Subculture	Drenten et al. (2023)	Female video gamers	Interviews and observations of female gamers	Tokenistic boundary work enables masculine dominance to thrive	Female gamers are made into exceptions that maintain male-dominance	Consumers Managing Stigma
Middle-class African Americans	Crockett (2017)	Middle class African Americans' status-displays	Interviews and observations at African American social and civic organizations	Consumers manage stigma by deploying counternarratives in use of objects and tactics	African Americans pursue respectability in their status consumption	Consumers Managing Stigma
Couchsurfers	Scaraboto and Figueiredo (2022)	Couchsurfing Netnography, participant observation, and interviews of coach surfers	Netnography, participant observation, and interviews of coach surfers	Consumers in a sharing economy orchestrate experience and co-create value	Sharing platforms can facilitate consumer orchestration	Consumer Ownership and Sharing
Low Wage Labor Migrants	Vannman et al. (2022)	Low wage labor migration	Interviews	Hardships endured to earn the sacrificial money transform it into a sacred object	Low wage migrants pursue aspirational caring, communal, and transformative consumer dreams	Sacrifice and the sacred

Select Tool: Isolating Constructs	Study	Context	Primary Data Source(s)	Theoretical Insight(s)	Substantive Insights	Broad Theme(s)
Natural Disaster	Ozanne and Ozanne (2021)	Christchurch earthquake	Ethnography using participant observation and in-depth interviews	Latent capacities for self-organizing and learning are built on the social capital.	A well-practiced ad hoc marketing system can buffer community	Mobilizing social capital
Pilgrimage	Higgins and Hamilton (2019)	Lourdes Pilgrimage	Ethnography using participant observation and serial in-depth interviews	Servicescapes facilitate therapeutic consumer rituals	Servicescapes facilitate therapeutic experiences	Therapeutic Consumption
Drought and its Aftermath	Phipps and Ozanne (2017)	Drought and water saving in Australia	Interviews, field notes, and photographs of homes focused on water use	Disruption of routines creates practice alignment associated with distinct ontological states	Consumers adjust practices to reestablish a sense of security following a disaster	Sustainability
Charismatic Brand Leaders	Wieser et al. (2021)	Shoe brand and its leader	Secondary data, interviews, archival data, and interviews with consumers and actors related to the shoe brand	Charismatic brand leaders create marketplace authority fueled by both believers and opposers	Brand activism can fuel the brand and the cause	Brand Activism
Extraordinary culture stories	Orazi and van Laer (2023)	Pop culture fantasy events	News archives, a survey, participant observation, audiovisual materials, interviews, consumer diaries and netnography of event experiencers	Extraordinary experiences bleed into everyday life	Moving out of an extraordinary experience creates trajectories for transformation	Consumer Transformation

Contexts that isolate an important consumer construct, process, and/ or group can facilitate theoretical and substantive insights. Many studies illustrate the theoretical value of selecting contexts that allow researchers to observe extreme values in domains of interest. These extreme values uncover and test taken-for-granted assumptions about consumer beliefs and activities and help identify the range over which behavior patterns apply. Importantly, because of space constraints, we provide only a thumbnail sketch of theoretical and substantive insights in the table. Our listing of broad themes is suggestive of some of the relevant grand challenges represented by this research, and we hope it engenders reader reflection on both presences and absences in what has been studied. Of course, there is a wealth of other CCT interpretive research of equal or greater value not represented in this chapter.

### **Isolating Constructs**

Sometimes authors use context to isolate, control or relax an important consumer construct through their choice of context. Numerous examples illustrate how an important construct gets highlighted by a given context. A few illustrations are provided in the table, but there are many others. For example, study of the Camino de Santiago pilgrimage in Spain offers an opportunity to control for the intrusion of the busy, constantly commercially mediated world and slow life down – a perfect context for introducing the concept of consumer deceleration (Husemann and Eckhardt, 2018). Given the physical pain the authors report, alternatively they could have employed a logic of debate (MacInnis, 2011) to extend the work on pain-seeking in consumption (Scott et al., 2017; but see Cova and Cova, 2019). Ethnography of an English Premier League football stadium allows authors to isolate a social atmosphere and offer insight into how interaction ritual chains co-created by firms and consumers create social atmospheres (Hill et al., 2022). Again, employing a logic of debate (MacInnis, 2011), these authors could have chosen to investigate the personalization of public space and the publication of private space as did Bradford and Sherry (2015) in their study in the context of college football tailgating, which in fact employs a logic of relating (MacInnis, 2011) to differentiate the ‘vestaval’ construct from festival and carnival.

Notably, examples listed in the table that identify and isolate a construct all also isolate groups and/or processes. Atanasova et al. (2023) identify the emergence of liquid consumer security, which they define as ‘a felt security that stems from avoidance of solid consumption and its risks and responsibilities’ (2). To isolate the construct and the strategies employed to achieve liquid consumer security, they study digital nomads. The construct has broad applicability for contemporary consumer life, but focusing on digital nomads helps to isolate and define liquid consumer security. While focused on constructs, Husemann and Eckhardt’s (2018) study – like Higgins and Hamilton’s (2019) – identify pilgrims as a heretofore little-examined consumer group.

While this chapter focuses on empirical research, conceptual CCT research has often been prompted by and then stimulated empirical research, enriching our understanding of important consumer phenomena and related constructs such as: consumer experience, consumption ritual, liquid consumption, consumer sharing, the internet of things and customer experience journeys (Bardhi and Eckhardt, 2017; Belk, 2010; Hoffman and Novak, 2018; Siebert et al., 2020).

## **Isolating Processes**

Over the last decade, consumer culture theory researchers have conducted much insightful empirical research to uncover important consumer processes. Most often, interpretive researchers use a specific context (characterized by a select group, event and/or place) to isolate a consumer process that sometimes also isolates an emergent construct. For example, Izberk-Bilgin's research among low-income Turkish consumers uncovers how the religious ideology of Islamism informs brand meanings and leads them to construct global brands as infidels (2012). Similarly, consumer culture theorists have learned a lot about how markets form and how they are legitimated (e.g. Brunk et al., 2018; Humphreys, 2010; Huff et al., 2021; Maciel and Fischer, 2020); how sharing platforms work and their vulnerabilities (e.g. Bardhi and Eckhardt, 2012; Figueiredo and Scaraboto, 2016; Rosenberg et al., 2023; Scaraboto, 2015); and how consumer practices are envisioned, assembled, habituated, disrupted, expanded and diffused (e.g. Akaka et al., 2022; Dolbec et al., 2022; Epp et al., 2014; Phipps and Ozanne, 2017; Thomas and Epp, 2019). These are just a few notable examples of important consumer processes studied by consumer culture theorists.

The table examples illustrate the interpretive craft of foregrounding processes at several distinct levels of context. For example, Marcoux's (2017) evocative examination of how consumers use souvenirs in a process of helping them forget 9/11 informs psychological research on memory – a microprocess at the individual level. By contrast, Valor et al. (2021) look at the delegitimization of bullfighting at a meso-level, uncovering the shared emotional discourses that lead to delegitimization of a consumption practice via the pathic stigmatization of bullfighting supporters. This work also contributes to re-socializing the concept of consumer emotion, which mainstream consumer research treats as an individual matter. Other tabled examples take meso-level internal perspectives, uncovering the roles of multiple market-system actors involved in processes of facilitating microloans (Bajde and Rojas-Gaviria, 2021), disposing of household waste (Cherrier and Türe, 2023) and engaging in repair practices (Godfrey et al., 2022).

As new parents studying new parents, Thomas and Epp (2019) unfold mechanisms that make it difficult to enact and habituate envisioned social parenting practices. Such a study, focused on meso-level internal contexts, could also be enriched by positioning these consumer experiences against questioning several key assumptions. These include what role cultural kinship norms and prevailing social ideologies play in specifying who can call themselves a family, questioning implicit rules for how households should ideally be structured, and questioning naturalizing family structures and values; all issues related to the external context of the authors' phenomenological consumer experiences.

Wieser et al. (2021) provide a provocative case study of a shoe brand community and its corporate leader, focusing more on the latter than the former. They analyze something we wake up to every morning in the news: how charismatic brand leaders, with ideological agendas, create marketplace authority fueled by both fervent believers and opposers. Their study contrasts with most of the research on consumption communities that does not foreground those in leadership roles, suggesting lines for future inquiry. Holistically speaking, it is a compelling story with numerous lessons that easily transposed to many political contexts globally.

The ability to observe flows, changes and relationality through isolating a process is a compelling and distinctive interpretive tool (Bansal et al., 2018). Despite a proliferation in types of data available and analytical tools, consumer culture theorists are uniquely equipped to

inform market and consumer ‘movements, flows and mobilities’, providing an understanding of markets and consumers in relation to ‘a network of meanings, practices and socio-technical arrangements’ (internal context; Thompson, 2019, 219). At the same time, looking at the processes through which everyday consumption practices reproduce and modify, encompassing cultural and social frameworks shows how consumption processes participate in the constitution of consumer society (external context).

### **Isolating Groups**

Many studies demonstrate the value of isolating groups. Isolating a group can help uncover an important phenomenon such as infidel brands, pilgrimage, consumer liquid security or trans-national gifting, and can also help unfold a process such as how gay men navigate stigma when it is fragmented. Or, as illustrated in the table, it can illuminate how Ghanaians experience permanent liminality between their Pentecostal faith and consumer aspirations. Isolating a group whose behavior differs from other groups can inform a process in unique ways, uncovering boundary conditions and opportunities for change. For example, Varman et al. (2022, 657) focus on low-wage migrants from Kerala who engage in what the authors term ‘sacrificial work’ in dreadful conditions in the Gulf States to gain resources that in turn enable them to (try to) realize ‘caring, communal and transformative’ consumption dreams at home. This work sheds light on an almost invisible context for most of us in the privileged Global North.

Back in that region, Scaraboto and Figueiredo (2022) highlight important sharing platform characteristics that distinguish Couchsurfing from other sharing platforms. By examining how consumers on this platform orchestrate experience and co-create value, they generate implications for other sharing platforms. Other examples in the table illustrate how isolating underexamined groups (Drenten et al., 2023; Thompson and Üstüner, 2015), and groups contending with internal heterogeneity (Crockett, 2017) groups that have experienced dramatic life changes (Thompson et al., 2018) can all inform our understanding of the sociohistoric patterning of consumption, the role of mass-mediated marketplace ideologies and emergent inequities and inequalities. Several of the tabled examples illustrate the complexity and nuances of stigma management. An interesting additional example highlights stigma complexity by focusing on how ‘late-singlehood’, educated, employed Chinese women manage the stigma their families feel due to their ‘failure’ to marry (Liu and Kozinets, 2022).

### **Going to Extremes**

As we discuss in Chapter 2 in this volume, the virtue of a particular context may be that it facilitates sampling of extreme values on dimensions of interest. Many examples already discussed foreground extremes to test boundaries of understanding or uncover processes that otherwise remain hidden. The table examples offer extreme instances of widely important consumer phenomena. From our perspective, each of these projects is characterized by high theoretical generativity (Mook, 1983). Going to extremes uncovers the boundaries of how, when, where and under what conditions theories apply, and consequently how and when they can be significant in addressing common and emerging problems.

Introducing the concept of therapeutic servicescapes that engage not just positive but ‘negative’ emotional experiences such as stigmatized crying opens numerous avenues for investigating these servicescapes that cater to various emotions and states including but not limited

to tranquility, sleep, pain and violence (Higgins and Hamilton, 2019). Crying is a common and frequently sought consumer experience – people buy books, watch movies, scrapbook and attend other people's weddings so they can cry.

Likewise, foregrounding the common contemporary condition of a saturated self through an examination of consumers seeking the emotional experience of pain opens avenues for investigating further the consumer and occupational choices of a saturated self (Scott et al., 2017; see also Cova and Cova, 2019). The consumer experience of 'bleed' from one experience to another is common; consumers might feel it upon coming back from vacation, heading into the work week, or in the aftermath of reading a book, watching a movie, attending a concert or leaving a Broadway show or football stadium after a game. To unpack this experience, Orazi and van Laer (2023) select an extraordinary context that highlights the process.

Grassroots consumer responses to emerging global challenges associated with extreme macro contextual trends, such as climate change and related so-called 'natural' disasters, inequality, the rise of nationalism, species loss and so forth, are relatively rare in our literature so far. One example in this table offer insight. Phipps and Ozanne (2017), unfold the ontological insecurity that accompanies profound disruptions in consumers' lives. They focus on drought, a context of substantial interest for a warming planet, but their theorizing applies to many other circumstances in consumers' lives, including the disruptive impact of COVID-19.

Two examples offer useful illustrations of event studies. Jones and Hietanen (2022; not in the table) articulate r/wallstreetbets, an event in which 'rogue' traders were able to momentarily topple billion-dollar hedge funds as an example of Deleuze and Guattari's war machine, rather than as a meaning-making collective mastering prosumptive finance practices. The authors outline how the r/wallstreetbets movement was able to momentarily upset global financial markets, but then critically assess this extreme event's potential as consumer resistance. They assess capitalism as an apparatus of capture that channels desire on a global scale. In this sense, capitalism incorporates consumer resistance even before it is imagined.

Ozanne and Ozanne (2021) examine grassroots response to a devastating earthquake by examining the intersection of two constructs, social capital theory and consumer learning theory. They show how an existing time banking system evolved to deal with the aftermath of the earthquake. Many of the thorniest problems we face would benefit from interpretive investigations of what works and possible dystopias by investigating existing extremes. Best- and worst-case scenarios offer ready opportunities to examine the boundaries of how, when, where and under what conditions we can create a better world. Consumer culture theorists have barely scratched the surface.

## CONCLUSION

Askegaard and Linnet quote Dilley, who remarked 'Context suffers the ... problem of infinite regress of contextualizing, contextualizing contexts and so on' (Dilley, 1999, 16); thus, 'it will always be an analytical choice to cordon off a part of the analytical field and present it as a contextual domain' (Askegaard and Linnet, 2011, 396). In developing tools for leveraging contexts for theoretical and substantive insights in this chapter, we suggest recent research in consumer culture theory has produced novel insight by adopting different ways of leveraging contexts. Some studies used contexts to illuminate a construct; others prioritized a context to draw attention to particular consumer group. Others have focused on consumption processes

loosely associated with acquisition, use, or disposition. And finally, scholars have been inspired by extreme cases or extreme events from which to derive theoretical insights. At the same time, each perspective usefully finds a place in any given paper.

In pursuing their craft, we suggest CCT scholars consider two kinds of contexts – internal and external – with an eye to developing theoretical and substantive insights at different levels of abstraction (e.g. micro, meso and macro). Micro-level phenomena such as expressed desire can be explained in terms of internal contextual relations reflected in thematic analysis of life-experience stories. This also calls for understanding emic perspectives in terms of external context and seeks to identify particular sociohistorical patterns or ideological shaping of these experiences. Attention to external context at meso levels of analysis is also valuable because it helps researchers understand a consumption phenomenon in its ‘proper’ situated sociohistorical influences, be those of a pilgrim, a labor migrant or a middle-class Turk. Attention to external contexts also fuels production of valuable intellectual material to develop more comprehensive theories of social class, gender, sacrifice or consumer culture itself. Both these theoretical and substantive insights are therefore of high value in advancing social science generally and in developing a greater understanding of consumer culture.

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## 40. Ethics and care in qualitative research

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### INTRODUCTION

In this chapter, we consider some ethical considerations in qualitative marketing and consumer research. Guillemin and Gillam (2004, 263) identify two types of ethics in qualitative research: procedural ethics, which involves obtaining approval from an ethics committee, and ‘ethics in practice’, which pertains to the ethical issues that arise during the course of the research. In relation to procedural ethics, the primary focus of ethics committees tends to be on the treatment of participants with a secondary focus on the safety of the researcher. Institutional ethical processes encourage us to consider harm to participants as one of our core guiding principles (embracing physical, emotional, social and psychological harms). For example, ethics committees have strict ethical codes that researchers must comply with relating to confidentiality and informed consent procedures that ensure participants agree to have their data (e.g. words or images) included in the study (Hennell et al., 2020).

Despite the importance of ethical approval, ethics committee procedures are often at odds with qualitative research, because their fixed or rigid guidelines are unsuitable for a more flexible and emergent research design (Hammersley and Traianou, 2012). Kara (2018, 9) notes, this ‘one-off administrative task’ is insufficient; instead, she situates institutional ethics as one small aspect of a ‘network of connected factors that affect ethical decisions’ (Kara, 2018, 10). This aligns with an ‘ethics in practice’ perspective that ensures ongoing ethical considerations throughout the research process, rather than a form-filling exercise at the beginning of the project. In this chapter, the perspective we adopt to explore the interconnected network of ethical issues faced by qualitative marketing and consumer researchers is relational ethics (Ellis, 2007), which focuses attention on interpersonal bonds and connections.

Given that the success of qualitative research is often based on forming and sustaining successful relationships, relational ethics provides a particularly helpful lens for an ethical researcher. Ellis (2007) primarily focuses on relational ethics in the context of relationships with research participants, but we suggest a sole focus on relationships with participants potentially overlooks other important relationships we develop in qualitative marketing research projects. As well as considering relationships with participants, we consider the importance of ethical relationships with our collaborators, whether these are researchers, co-authors and/or non-academic research partners. Given its focus on sustaining healthy relationships, relational ethics aligns well with an ethics of care approach (Ellis, 2007).

Ethics of care has roots in feminist research with the following often-cited definition of caring offered by Tronto (1993, 103):

a species activity that includes everything we do to maintain, continue and repair our ‘world’ so that we can live in it as well as possible. That world includes our bodies, our selves, and our environment, all of which we seek to interweave in a complex, life-sustaining web.

In this chapter, we follow others (e.g. Edwards and Mauthner, 2002) who have argued that the research process could be enhanced by a more explicit grounding in an ethics of care perspective. In viewing care as the ontological basis for our relationships,

care ethicists stress that we should make decisions about what would be right or wrong, good or bad, in ways that take account of our own relationship to the people who would be affected by the decision and their level of vulnerability (Hammersley and Traianou, 2012, 30).

An ethics of care approach emphasises contextual and relational considerations (Edwards and Mauthner, 2002; Noddings, 2013), and prioritises responding to the specificities of relationships. This perspective suggests research design is approached in an integrated way, which goes beyond scenarios and abstract ‘what ifs’ to embrace a more holistic and relational approach to ethics. This framing is useful for addressing the emotions and conflicts that are an inevitable part of human relationships.

In this chapter, we consider in turn the relationships fundamental to qualitative research (with participants, non-academic research partners and collaborators) and the ethical questions that arise when interacting with each group. Finally, we provide a checklist of questions for qualitative researchers to use when adopting an ethics of care perspective.

## CARING FOR RESEARCH PARTICIPANTS

Toombs et al. (2017) show how a care ethics perspective can clarify the relationships that develop between researchers and participants in qualitative research, arguing that such relationships are reciprocal. In this section we build on this idea and examine a range of issues around caring for research participants in a qualitative research setting. We first discuss how considerations of humanity can be woven into the research process. We then move on to discuss different forms of participation in research and draw attention to issues of language, informed consent, and ‘aftercare’.

Ruth and Otnes (2006, 560) ask ‘how can researchers create research experiences that will be remembered by informants, not as burdens, but as interpersonal encounters that were reasonable in scope, beneficial in some way, and possibly even enjoyable?’ They suggest one way is to consider etiquette practices as integral to the process – a means to demonstrate humanity. However, while attending to etiquette might invoke aspects of the concept of care, does its connotations of politeness and decency go sufficiently far in emphasising our duties and responsibilities as researchers to treat our research participants in a humane manner? Kozinets (2020, 181) raises the relevance of humanism and religious metaphors, suggesting that Buddhism could provide a means of ‘remaining reflective throughout all the stages of our investigation, seeing our research work as an extension of our attempt to live a moral life’. Again, this encourages an integrated approach that avoids causing ‘suffering of the other living beings with whom we interact’ (181).

The above (and related) approaches recognise the need for more encompassing and interconnected approaches to understandings of ethics as they relate to research participants. While ethics committees refer to human participants, sometimes it is their very humanness which is missing from guidance and form filling. Indeed, Ruth and Otnes (2006) draw on Fontana and Frey’s observation that researchers should ensure that ‘the “other” is no longer a distant, aseptic, quantified, sterilised, measured, categorised and catalogued faceless respondent, but

has become a living human being' (Fontana and Frey, 1994, 373). This represents a switch in ethos away from doing 'to' towards doing 'with', thereby encouraging a major rethink in research designs, including rethinking what it means to be a participant and how we as researchers position research participants. As Toombs et al. (2017) identify, this performance of care (between researchers and participants) is particularly important in longitudinal designs; the authors describe it as reciprocal and developing.

In line with these shifts towards more carefully considering relationships with those who contribute to our research, a number of researchers adopt study designs that lend themselves to different forms of participation. Examples can be more easily found in other social science disciplines, where community work is more commonplace. For example, sociologist Sophie Woodward regularly partners with community groups with interests that gel with her expertise in material methods. This enables her to collaborate in ways that are potentially more meaningful for participants and in keeping with community approaches – e.g. practical workshops, storytelling sessions (Woodward et al., 2022). Such approaches are less directive than many of the typical approaches used in marketing (such as focus groups and interviews) and their more informal approach often involves relinquishing control in addition to embracing alternative power structures/imbalances.

Other participatory approaches are also gaining momentum in the social sciences and, to a lesser extent, in qualitative consumer and marketing research (e.g. Ozanne and Saatcioglu, 2008; Saunders et al., 2021). Essentially, participatory research encompasses designs where researchers work closely and directly in collaboration with those affected by an issue being studied, usually for the purpose of action or change (Vaughn and Jacquez, 2020). A foundational premise is the inclusion of citizen or consumer voices in participatory research, those with lived experience of the issue under study (Groot et al., 2022). However, Groot et al. (2020) note that, while research may be described as co-designed, in practice experiences can vary, given the challenges, deadlines and priorities of different parties, with the pressure for co-written (academic) outputs not necessarily shared across the team. This begs the question whether potentially conflicting pressures (Piacentini et al., 2019) can hinder commitment to an ethics of care approach, which should involve seeing things from others' perspectives and respecting their priorities.

These developments around research participation lead us to consider more carefully the use of language in qualitative research. We use the term 'participants' in this chapter, in common with other key qualitative marketing and consumer research texts (e.g. Moisander and Valtonen, 2006), but do we always do justice to what this term represents/should represent? According to Morse (1991, 403), participants is the more active of the terminology used to describe those who 'assist us in our research inquiry' when compared with subjects, respondents and informants. However, do we always grant 'participants' the active control that the term denotes? Does a participant in a research study deserve/receive more care than, for example, a subject or respondent? Are there always such clear distinctions as Morse (1991) suggests?

The use of such language might also indicate the nature of the relationship that is formed between the researcher and participant. While the experiences of Toombs et al. (2017, 53) encourage 'implicit care' through recognition of emotional vulnerabilities and supporting participants' 'needs for validation', Duncombe and Jessop (2012, 108) voice caution over the encouragement to use interpersonal skills to develop rapport with participants, questioning the ethics of this, given the 'instrumental purpose' of research. They question whether informed

consent always accounts for information disclosed when participants feel listened to, cared for, and emotionally connected with the person conducting the research, thus potentially problematising the very premise of relational approaches (Ellis, 2007).

Further variations and complications in issues of care and consent are notable in qualitative research in social media spaces. In these spaces, qualitative researchers increasingly adopt approaches where participation is less clarified; sometimes participants lack the knowledge that they are contributing to a research study at all. This has been discussed within the context of netnography, where Costello et al. (2017) refer to ‘active’ and ‘passive’ netnography; terms which recognise the overt or covert nature of research (O’Leary, 2021) and elicit concerns over associated behaviours such as ‘lurking’, and issues with the lack of informed consent. Further, Hennell et al.’s (2020) experiences of research on alcohol consumption by young people demonstrates that, even in online research where informed consent is agreed, participants can sometimes forget they are participating in a research study.

In view of some of these emergent issues, Kara (2018) identifies ‘aftercare’ as a neglected area. Aftercare recognises that responsibilities to participants extend beyond data collection. However, requirements differ depending on methodological approaches; so, for example, community-based research may involve longer term relationships where deeper connections are maintained with both participants and wider communities. Yet Duncombe and Jessop (2012) draw our attention to the potential for what they term ‘fake friendships’ to develop, which may work well for both parties during the research encounter itself (e.g. with participants feeling cared for) yet not be experienced so positively when participants realise that researchers were just doing their job and expect to cease all contact once data collection is complete. In some contexts, more standard approaches may be appropriate and ‘aftercare’ limited to thanking/acknowledging participants, signposting support where needed and devising clear endings for the research relationship. There should be recognition that this can differ depending on the context and nature of the participants (e.g. participants with vulnerabilities) (Kara, 2018).

Aftercare also links to questions of representation, and a responsibility to portray participants respectfully. Ruth and Otnes (2006, 571) challenge researchers to ask introspective questions such as whether they ‘would feel comfortable sharing the textual representation with informants’ and Kozinets (2020, 186) urges us to ‘treat the persons behind the data with dignity and to handle their data with respect’. Such an approach raises important issues of trust, which are, of course, exacerbated in the case of online methodologies by the murkiness or fluidity of understandings of the public/private nature of online data. However even if we are able to put ourselves in the position of those we research and prejudge how others may respond to how they see themselves represented in research, this is not straightforward, and complex issues associated with care, humanness, decency and dignity emerge. The above discussion begs the question whether we always (can) sufficiently consider the potential vulnerabilities of our participants beyond institutional ethics committee checklists. And, associated with this, can we truly account for the range of reasons individuals might decide to participate in research, what they hope to get out of research encounters and any lasting impacts?

## CARING FOR NON-ACADEMIC RESEARCH PARTNERS

In this section we reflect on the ethical issues associated with working with external non-academic partners, so crucial for engaged research. In marketing and consumer research addressing questions of societal concern, stakeholder involvement is important, and includes both research participants and partner organisations involved in the community of interest. Often, this type of research is qualitative in nature, requiring researchers get close to their study context and the people who the research may have most impact on. To facilitate the opening of study contexts, researchers often work with charities and other organisations, who can bridge these worlds (the academic researcher to the study context). These organisations are known as social impact organisations (SIOs), and they work to address societal problems in context, often having strong links to communities and end-users (Bublitz et al., 2016). Developing partnerships with these social impact organisations can be an important and valuable way to navigate and facilitate access to service users, thereby ensuring they are included in the research (in line with the principles of ethics of care research, ‘research with, rather than to’).

Additionally, working with partner organisations can be a valuable way to identify timely social problems (Ozanne et al., 2022), thus ensuring that societal impact and relevance is woven into the research design from the outset. In these kinds of studies, a co-creational or participatory approach to study design is often adopted (Ozanne and Saatcioglu, 2008). Such an approach requires that partner organisations are involved from very early on, to ensure that meaningful co-design of the research takes place. As we discussed in our section on caring for participants, a foundational premise of participatory research is the inclusion of citizen/patient/consumer voices in research (Groot et al., 2022). This means including people who have lived experience or are experts by experience of the issue of interest (Ayton et al., 2022).

For SIOs, potential research participants are often their clients (or service users or patients), and there may be ethical, emotional, mental and physical sensitivities that need to be protected and considered (Piacentini et al., 2014). Trust is a key issue in the relationship between the SIO as gatekeeper and the people being researched (Emmel et al., 2007), and is generally higher when the SIO is closely involved in participants’ lives. Great care needs to be taken in nurturing and developing relationships with the SIO to not jeopardise those trusting relations. Trust must be built by the research team in their relationship with the SIO, to show that the researchers are sensitive and responsive to the issues faced by the participants. Piacentini et al. (2019) describe a range of activities and events that can be implemented in order to encourage and catalyse solid working relationships between academic researchers and SIOs. A key point is that time and effort is needed to develop the relationship and to ‘find common interests, build trust and break down assumptions’ (336). Relationship building and management takes time and commitment, including being open to the work going in directions not anticipated or imagined in the setting up phase.

Another consideration is the issue of potential power imbalances between researchers and partner organisations. This imbalance may stem from the traditionally tokenistic way that stakeholders are included in research to demonstrate some connection to the study group (Herr and Anderson, 2014), but with little deep involvement in the study design. However, more recent participatory research and co-design models involve partners deeply in research planning, sample access, data collection, analysis and writing (Bennett and Brunner, 2022; Groot et al., 2020). From such a position, the power imbalance becomes more equal or even skewed

towards the partner, since they become an essential actor in providing meaningful access to and engagement with the study sample – without their involvement the research cannot take place.

Given the importance of partners for research design, and the potential power imbalance, it is helpful to consider the differing assumptions that each actor (the researchers and the partners) have about the other, as we come to work together (Mannay, 2016). Working in partnership on research is exactly that – it is a partnership with each partner having purpose and objectives from the relationship, hoping to achieve some benefit. Therefore, when working with partners, it is especially important to develop a shared understanding of what the partner organisation needs or wants from involvement, and how this relates to what the researcher and the research can deliver. This relates to reciprocity, taking care to ensure consideration is given to thinking about the mutual benefits for all involved in the research, and uncovering and managing expectations and assumptions in this regard. A challenge with qualitative work is the (seeming) open-endedness of it, which can make it hard to contain expectations of partner organisations, especially if they are actively collaborating in the research.

This leads to questions around compensation for the time given to involvement in the research, recognising that this extends from the planning stages of the research, through to ensuring that, if successfully funded, the partners are adequately compensated for their time, expertise and skills that bring value to the project. Associated with this is the question of standards in research.

In our previous work (Piacentini et al., 2019), we have discussed the rigour-relevance debate in relation to academic-practitioner collaboration. By this we refer to the need to balance academic ‘scientific’ standards and theory in research alongside the need for real-world practitioner relevance (Kieser and Leiner, 2009). When working with non-academic partners to co-deliver research there may need to be some sensitivity as to how research will be operationalised in practice (Olmos-Pefuelo et al., 2021). Practitioner partners may envisage an inquiry or research role for themselves, since this is in keeping with the collaborative participatory approach (Bennett and Brunner, 2022). For qualitative research such a scenario may be even more likely, since qualitative methods (interviews, observations, group discussions) can often appear accessible and amenable to the novice researcher. Being clear on the requirements from all involved to ensure that ethical standards for research are maintained – including the training that may be involved to bring the partner organisation into the research context – is important. The challenge is respectfully coming to a shared understanding, including learning from each other, to ensure that ethical challenges associated with collaborative work are addressed (Bennett and Brunner, 2022).

## CARING FOR RESEARCH COLLABORATORS

The qualitative research papers published within marketing journals are often the result of collaborations that involve multiple scholars. Indeed, Belk et al. (2013) suggest that it can be easier to work as part of a research team than to work alone in qualitative research projects. These authors refer to how teamwork supports idea generation (e.g. through sharing fieldnotes), offers practical advantages (e.g. managing recording equipment) and offers emotional support in dealing with the hands-on nature of qualitative research. We suggest that relationships with research collaborators are another context where an ethic of care approach

is valuable. In this section we cover the benefits of adopting an ethics of collective academic care, the roles of trust, reflexivity and researcher vulnerability in collaborative projects, and the importance of carefully selecting collaborators.

Over the years, we have each been involved in a range of qualitative research collaborations and also worked in research teams with each other. Of particular note is our recent project in which we introduce an Ethics of Collective Academic Care (CRIS Collective, 2023). This project brought together twelve researchers and stemmed from our activities of co-chairs of the Academy of Marketing SIG on Consumer Research with Impact for Society. An Ethics of Collective Academic Care advocates for research collaborations that emphasise empathy, mutual respect, attentiveness and nurturing. We find that collaboration based on these ethic of care values leads to wellbeing benefits for researchers and provides an important respite from the more competitive and individualistic academic culture. In allowing more humanity into our professional collaborations and sharing our vulnerabilities with each other, we are also able to de-emphasise hierarchies that may otherwise create a barrier to successful project completion.

While collaborations that adopt an ethic of care may be applicable to all kinds of research, we see it as particularly relevant to qualitative research. De La Bellacasa's (2012, 198) assertion that 'relations of thinking and knowing require care' becomes more paramount when considered in the context of qualitative projects that involve hands-on immersion. The empathetic understanding that is necessary for successful qualitative marketing research can be enhanced when collaborators are committed to a caring approach. Taking inspiration from Haraway's work on the situated character of knowledge, De La Bellacasa (2012, 203) suggests the notion of 'thinking with' as a way to make 'the work of thought stronger'. We see this perspective as useful for dealing with the richness of qualitative data when interpretation may not be straightforward.

Trust is an essential ingredient for successful 'thinking with'. As ethical researchers working as part of a team, it is imperative that our collaborators trust us to adopt a caring approach. Within qualitative research, researchers become the research instrument, so it is equally important that we trust each other to care about the project and the wellbeing of other members of the team. Trust also means taking the time to listen carefully to each other, leaving open the possibility of disagreement, and carefully managing relationships with collaborators to account for divergent positions. Importantly, a caring perspective on academic knowledge generation avoids idealism or romanticism by acknowledging that collaboration tends to involve tension or conflict. De La Bellacasa (2012, 205) refers to such conflict as 'dissenting-within' in recognition of 'the unavoidably thorny relations that foster rich, collective, interdependent, albeit not seamless, thinking-with'. The messy, and sometimes overwhelming, nature of qualitative data makes such tension even more likely, and an ethics of care approach offers a valuable strategy to deal with this tension.

In our own work we have suggested collective reflexivity is helpful to promote an ethics of collective academic care (CRIS Collective, 2023). Likewise, Harris and Fortney's (2017, 22) notion of reflexive caring suggests that reflexivity should never be an individual practice but rather a 'relationship of interdependence'. The scope of Harris and Fortney's (2017) reflexive caring goes beyond relationships within the research team, but we see it as particularly helpful to inform and improve collaborative processes. Within qualitative marketing research, reflexivity is well established as a means to attend to the dynamics of the researcher's relationship with participants (e.g. Bettany and Woodruffe-Burton, 2009). Embracing a caring reflexivity amongst members of the research team would extend attentiveness to the dynamics of

researchers' relationships. Drawing on Harris and Fortney (2017, 20), reflexive caring 'refuses heteronormative understandings of public life, and it invites willful vulnerability'.

The link between reflexive caring and researcher vulnerability is likely to play a bigger role in qualitative research as we aim to get close to our participants and capture their lived experiences. This can manifest in emotional responses to data collection and, at times, a lack of preparedness to deal with the emotional impacts of our research (Jafari et al., 2013). Arguably, having a support network in the form of other members of the research team would be beneficial; however, achieving reflexive caring 'requires radical relationships' (Harris and Fortney, 2017, 30) that may be far removed from the norms of professional academic relationships. Thus, sharing the emotions of our research experiences does not always come easy. Steadman's (2023) very honest autoethnographic account of the researcher vulnerabilities experienced in her PhD research on tattoos, time and death makes this clear. Although Steadman (2023, 822) calls for a 'greater celebration' of researcher vulnerabilities to counter perceptions of 'vulnerability as failure', she also acknowledges the anxieties associated with revealing vulnerabilities to others. The exposure of researcher vulnerability associated with reflexive caring once again reinforces the need for trust amongst the research team. An ethic of collective academic care works best when members of the research team can be open and honest about their needs and experiences.

Various scholars have discussed the concentric circles that constitute care networks (Lynch, 2007; Noddings, 2013). Lynch (2007) draws attention to three care circles. Primary care relations are those that an individual holds most significant and involve the highest level of emotional attachment, typically within the family. Secondary care relations are where work relationships fall and involve more moderate levels of trust, belongingness and engagement. Tertiary care involves relations of solidarity and are more likely to involve unknown others rather than personal connections. Although research collaborations would constitute a secondary care relation, it is important to acknowledge the overlapping and intersecting nature of these circles. An ethics of care approach therefore considers that professional working relationships between collaborators are likely to be influenced by primary care relations. In practice, this means research teams adopt a flexible approach to accommodate each other's broader care obligations, for example, for children or other family members.

All of this discussion suggests that the selection of who we want to collaborate with is a significant decision. Collaborators often come together based on epistemological preference or interest in a particular phenomenon while interviews for doctoral research positions tend to emphasise competence to conduct the research. Arguably, issues of trust and the sense of being on the same page as regards approaches to collaboration are equally important. One possible practical implication could be to embed 'contracts' within collaborative relationships to address such issues. This would normalise upfront conversations on approaches to research collaborations. While the values and collaborative approach adopted by research teams tend to remain outside the scope of institutional ethics committees, we see it as a crucial consideration for researcher wellbeing.

## CONCLUSION

Stakeholder involvement and engagement form part of the core principles of responsible research (as understood by the Responsible Research in Business & Management Network,

2023; see <https://www.rrbm.network>), with stakeholders including all those involved in the research, such as researchers, participants and non-academic partners. In highlighting the various relationships that are central to qualitative marketing research, we can advance ethical considerations beyond the legal requirements of institutional review boards where the more human aspects of ethics in practice can get lost. In adopting a broader relational perspective that is informed by an ethics of care, we are better placed to attend to the wellbeing of all those involved or impacted by the research. The variety of qualitative research approaches makes it impossible to offer a comprehensive checklist that details how an ethics of care perspective should be operationalised, and the relationships discussed will be informed by the wider cultural context in which the study is based.

As an alternative, Table 40.1 proposes various questions that researchers should ask themselves to draw attention to potential ethical issues that more conventional approaches may unintentionally overlook. Our hope is that these questions may go some way towards inspiring researchers to embracing an ethics of care in their qualitative research.

*Table 40.1 Potential questions towards an ethics of care perspective*

Caring for Participants:	How could/should we ‘manage’ the relationship with our participants before, during and on completion of data collection?  How would we feel if this was our data, if we were represented in this way? Is there the opportunity to grant our participants a more active voice in the design of the research including their representation in any outputs?  Are we aware of all possible impacts on participants? How can we ensure that we are in the best position to understand these impacts?
Caring for Non-academic Collaborators:	Can partnering with organisations sometimes impact the voluntary nature of participation?  How much do we potentially ‘give up’ in terms of ethics in care when we partner with organisations?  Are there conflicts around ‘who knows best’ for the participants when partner organisations are involved – they are often embedded in the community, and sometimes experts by experience – do hierarchies of ‘knowing’ emerge?
Caring for Research Collaborators:	Are there any hierarchies and associated power differentials at play in the research team? If yes, how do we manage them?  What communications strategies are we adopting to ensure everyone has a voice, even when opinions differ?  Is there trust amongst the research team? Do we have a forum for sharing our vulnerabilities and emotional responses to the research?

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## 41. Write on

*Stephen Brown*

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### HOOKERS

Yes, hookers. No, you haven't misread that, nor are your eyes deceiving you; hookers. Hookers with a capital H. However, before you dismiss me as a sexist dinosaur or call the #TimesUp hotline or consign me to whatever pit of cancellation hell people like me are consigned to, or insist that I be banned from every learned journal known to humankind – the free market has taken care of that already – bear with me while I explain.

'Hooker' is Stephen King's term for the first sentence of any work of literature, be it a novel, a short story, a magazine article, a book chapter or whatever. The hooker's function, he goes on, is to grab the reader's attention – to hook them in a metaphorical sense – and make them want to read on. Hence his classic essay, 'Great Hookers I Have Known', the opening line of which is a wonderful, if wordy, hooker in itself:

When I finally understood what my thirteen-year-old son was talking about, I told him no problem, I could find him a couple of good hookers easy – and maybe even a couple of *great* ones (King, 2000a, 373).

These hookers, since I've hooked you sufficiently to read this far, include the first sentence of James M. Cain's *The Postman Always Rings Twice* ('They threw me off the hay-truck around noon.'), the first sentence of Peter Straub's *Ghost Story* ('What was the worst thing you've ever done?'), the first sentence of Somerset Maugham's *The Razor's Edge* ('I have never begun a novel with more misgiving.') and King's alltime favorite, from Douglas Fairburn's *Shoot*, 'This is what happened'.<sup>1</sup>

As a writer of popular fiction, it is perhaps unsurprising that, with the exceptions of du Maurier's *Rebecca* and Melville's *Moby Dick*, King eschews the 'classic' opening sentences cited in upscale sources like the *Oxford Dictionary of Quotations*: Austen's truth universally acknowledged, Orwell's clocks striking thirteen, Camus' mother's death, Alcott's Christmas cracker, etc. He also excludes his own first lines, though he's no slouch in that department: 'I have never been what you'd call a crying man' (*11/22/63*); 'The man in black fled across the desert, and the gunslinger followed' (*The Dark Tower*), 'Once upon a time, not so long ago, a monster came to the small town of Castle Rock, Maine' (*Cujo*) and, the horror-meister's pride and joy, 'You've been here before' (*Needful Things*).<sup>2</sup>

### GET GO

So what? I hear you say. Who cares about King? Hookers have no place in academia. Not in consumer research, at any rate. Our articles recount the findings from carefully conducted, vigorously vetted, rigorously reviewed and reassuringly robust research exercises. Which is

true. For the most part. On top of that, so-whatters sniff, our suitably scientific first sentences are preceded by all sorts of stuff such as abstracts, key words, contact addresses, Orchid identities, and dois longer than the computer code for the Apollo program. As a result, our opening lines are often situated somewhere in the middle of the first page. Or in the case of Emerald's so-called 'structured abstracts' – what malevolent creature came up with that one, Stephen King? – at the top of page two, if we're lucky.

But the obstacle course at the start of our articles doesn't mean hookers are unnecessary.<sup>3</sup> They're all the more important. Because if the first line is flat or reads like a continuation of the scholarly sludge that surmounts it, the reader may conclude that the summary statement will suffice. Then move on to the next article that catches their eye, pausing only to peruse the opening and closing paragraphs or, perhaps, skim read the discussion section if it seems particularly pertinent.

There's no reason, moreover, why the abstract can't be written in hooker-speak. Even those caught up in Emerald's egregious coils, which have been known to drive tyro researchers into easier alternative careers like lion taming, bull running or parachute-free base jumping, can escape its tedium-inducing, hooker-hostile commandments. But I'll save that reward for later. Keep reading ...

King's hookers of course aren't just eye-catching, collar-grabbing, shoulder-shaking, spine-tingling sucker punches that stop prospective readers in their tracks before relieving them of their hard-earned disposable income. Though there's some of that, since the King of the bestsellers list is nothing if not marketing minded (Allan, 2021). They are important to him too. As he confesses in *The Atlantic*, Steve suffers sleepless nights, agonizes for weeks, worries, worries, worries away at his opening sentence – akin to tonguing a broken tooth, he says – until it feels right, rings true and affords orthodontic relief, so to speak (Fassler, 2013).

And why? Because he can't write without them. Snappy opening sentences are the key to Stephen King's creativity. Once they're nailed down, the rest of the novel or short story or whatever it is rolls out like the proverbial red carpet. And given that his 'read carpets' usually run for several hundred pages – one thousand plus in the cases of *The Stand*, *IT* and *Under the Dome* – that's some sentence. 'My books,' he says, 'tend to begin as first sentences – I'll write that opening sentence first, and when I get it right I'll start to think I really have something.' Getting it right, he goes on, can take 'weeks and months and even years' (Fassler, 2013).

## GET CREATIVE

Lest you conclude that King's a crank, albeit an extremely affluent crank whose publications are read by more people than all of our academic articles combined, his first sentence fixation is far from unusual. Ernest Hemingway and Edna O'Brien, to name but two renowned novelists, need their opening sentences locked and loaded before they can pull the trigger of writing. For others, notably Nobel-prizewinner William Faulkner and bestselling Scottish author William Boyd, it is the final sentence that jump-starts their idling engine. Once they know where their destination is, they can figure out how to get there. J. K. Rowling, for instance, famously knew the concluding words of her entire seven-volume Harry Potter saga before she first put pen to paper in Nicholson's café in Edinburgh's Old Town.<sup>4</sup>

Temporal pressures too can trigger torrents of words, as deadlines for conference papers, book chapters, dissertation completion and tenure tracking attest.<sup>5</sup> Many have a rigid writing

regimen, all day every day, week in week out. Our esteemed editors, I suspect, operate on that principle or something very close to it. They wouldn't have published so many papers without one. Either that or a pact with the devil ...

In my own case, such as it is, the title is crucial. I'm incapable of writing an article, or anything else for that matter, without a title. Not unlike King, albeit at a much, much lower level – my Mindanao Trench to his Mount Everest – I agonize over the titles of my articles. They gnaw away at me until the 'write' one bites my assonance, as it were. Typically, I'd jot down five to 10 possible titles, sometimes more, as they come to me. This process can take a long time, but without a settled title the idea will languish forever in my little black notebook, where it withers and dies. Potential titles for the present chapter, since you insist in poking your nose into my private ponderings, included 'The Write Stuff', 'Writing's Wrongs', 'Righting Writing's Wrongs', 'tl;dr', for the minimalists among us, and just to get a reaction, 'Don't You Wish Your Writing Was Hot Like Mine?' Common sense prevailed.

Flicking further back through my little black book, I come across scores of empty literary vessels – it takes one to know one – like 'Toward a Typology of Typologies', 'Who Let the Doggerel Out?' and an academic suicide note I wisely decided not to write, 'CCT is Not for Me!' Some things are best left unsaid. However, there's one thing I can say for certain. The wonderful thing about amusing, allusive, echoic, ear-catching or indeed infuriating titles like 'Hot', is that they trump the opening sentence issue noted earlier. Titles trump everything. Titles come first, both figuratively and literally. Titles surmount and transcend all the foliage, the folderol, the fluff that precedes the first line, in academic articles at least. They also appear on the contents page of the issue concerned, where they 'catch the eye' of passers-by.

Oh, and let's be honest here for a second, the title of King's hooker essay is the real hooker, much more so than the wordy opening sentence. And, while we're at it, let's be even honester, if there is such a word. Snappy starts, be they titles or first lines, are all fine and dandy – vital, in fact, given the number of papers vying for readers' attention – but unless our articles have something new or different or interesting or offbeat to offer, or make some kind of 'contribution', even a troublesome one, our writings don't amount to Humphrey Bogart's hill of beans in this crazy world where we care more about the ranking of the journal that contains it than the words on the page of the paper.

## GET GRINDING

Ideas aside, everything else you need to know about writing can be summarized in the fabled, the fabulous, the failsafe 5-G communications framework, which I've just invented. The framework comprises the following, fortuitously alliterative checklist: *guide books*; *genre rules*; *grunt work*; *guard dogs*; and *glorious gratification*. It takes gratuitously grandstanding hyperbole as a given, since more than a few academic careers have been built on it. Present company included. But moving swiftly on, let's get this G-string started.

### **Guide Books**

The good news is that there's no shortage of writing about writing. If anything, there's much too much. Just about every writer who's written a bestseller, or even a critically acclaimed contender for the close-but-no-cigar award, releases a how-to-do-it text at some stage. George

Orwell's (1962) 'Politics and the English language' is the go-to essay for many. Strunk and White's (1999) *Elements of Style*, which is admirably short 'n' sweet 'n' strict to the point of severity, is another much-loved landmark contribution. Rightly so. Other noteworthy book-length treatments include Anne Lamott's (1994) *Bird by Bird*, David Lodge's (1992) *Art of Fiction*, Stephen Pinker's (2014) *The Sense of Style*, and the ever-dependable *Idiot's Guide to Creative Writing* (Rozakis, 1997). Scholarly scribbling, similarly, is not short of head-shaking, hand-wringing, woe-is-us treatises on the sorry state of academic communications. These range from Helen Sword's (2012) *Stylish Academic Writing* to Michael Billig's (2013) *Learn to Write Badly*. Oh, and then there's *Writing Marketing* (Brown, 2005), which is still available from all good thrift shops, used book stores and Amazon Marketplace sellers everywhere.<sup>6</sup>

As you may have surmised, I've acquired an awful lot of how-to texts through the years. I stare at their serried ranks from time to time, hoping to absorb their sagacious insights by osmosis. Most of these are variations on keep-it-simple-stupid.<sup>7</sup> In my own case, mind you, if there's the faintest possibility of an alliterative riff in the offing, KISS can kiss my keister. Be that as it may, by far the best book about writing is Stephen King's *On Writing*. It's written in the great man's regular-guy style – colloquial, funny, demotic, pragmatic, with plenty of worked examples, just-do-it exhortations and delicious dollops of autobiography. He also has a winning way of admitting his own 'failings'. Did he really write *Cujo* while drunk or *The Tommyknockers* on drugs? One is left with an overwhelming desire to fail as well as King does. Little wonder it's a set text on many creative writing courses. Here's a taste of its savory flavors:

One of the really bad things you can do to your writing is dress up the vocabulary ... Make yourself a solemn promise right now that you will never use the word 'emolument' when you need 'tip' and you'll never say *John stopped long enough to perform an act of excretion* when you mean *John stopped long enough to take a shit* (King, 2000b, 129).

No, don't thank me. It's my little guidebook gift to would-be writers among us. The key point is that if you wish to write better, read King. If you want to escape the abominations of academic writing, read the horror writer supreme. If you erroneously believe that scholars have nothing to learn from bestselling novelists read the collected works of Russell Belk and Cele Otnes, who often take inspiration from top-notch storytellers, King included.

## **Genre Rules**

Stephen King, of course, is often dismissed as a genre writer. And so he is. But, despite his early-career reputation as a schlock-horror hack, he writes in many different literary genres including thrillers, SF, sword 'n' sorcery, police procedurals, comic books, serial fiction, fairy stories and, as *On Writing* indicates, nonfiction. He's a master of them all, what's more. Or so his stupendous sales figures suggest. Academic articles are also a genre of sorts, with a standard structure and a series of long-established conventions that we writers are required to follow. Some of these precepts are imposed by publishers, whose house styles are sacrosanct and must be followed to the letter. But as often as not, the norms are absorbed – internalized rather – by ourselves as we toil in the hardscrabble fields of scholarship and which are passed on to our own students, in the fullness of time, as well as those we review. The parameters are self-perpetuating.<sup>8</sup>

This problem, if it is a problem – since a set of ‘rules’ gives newbies the guidelines they need – is not confined to works of scholarship. It is evident in every sphere of creative activity. As Moran (2020, 23) rightly notes, ‘mimesis rules the form … Just as a mockingbird borrows its song and a jazz musician riffs on familiar motifs, so templates and formulas are the bedrock of literary creativity.’ The same is true of consumer culture, where copy-catting is commonplace (Earls, 2015). Shades of shoulders of giants …

Many years ago, someone who must remain nameless penned a little list – a top ten list, no less – of the unstated rules that marketing and consumer research articles must adhere to. These conventions include: Your title must contain a colon, since semi-colons are for wimps, whereas periods imply impending megalomania; Introductory paragraphs must employ some manner of spatial or positioning metaphor, for to suggest that there isn’t a gap in the literature can invite reviewer reactions of the ‘why bother’ type; Always refer to the ‘exploratory’ nature of the research, since this gets you off all sorts of methodological, epistemological, ontological … and any other ‘logical’ hooks you can mention; You must construct a model or framework of some kind, ideally one that looks like the secret lovechild of Buckminster Fuller and Heath Robinson.

A quarter of a century on from that inventory, the software for model-building has much improved. But most of the rules remain in place, notwithstanding our field’s increasing acceptance of alternative forms of academic communication. Acceptance in theory, that is. In practice, videos, poetry, short stories and so forth rarely appear in the ‘top journals’, to their advocates’ understandable annoyance. But where there’s strife there’s hope.

## **Grunt Work**

Hope is not enough, however. It doesn’t cut the mustard, butter any parsnips and, despite Dickinson’s ‘thing of feathers’, its wings can’t carry a heavy payload. Published articles are an outcome of hard graft, long hours, reading widely, back-breaking data gathering, heart-wrenching empirical analysis and, when it comes to ‘writing up the results’, sitting at a desk typing, editing, chopping, changing, cursing, swearing, starting from scratch, drawing blood from a stone and trying not to chuck it in for the day or give up completely when things aren’t going well, which is often the case. Although some eminent academics have teams of research assistants and doctoral students who toil for the ‘top prof’ in return for co-author credit on the published outcomes – though casual readers only really notice the big name – none of this detracts from the fact that grunt work is integral to the writing process. Great writers, like top athletes, are hard workers. And just as top athletes train harder for longer than their competitors, irrespective of ‘natural talent’, the best writers are coming up with words, laying down the sentences, pouring out the paragraphs while we are staring into space or squandering our time with some silly distractor activity like Tetris. My highest score is 353288, since you ask.<sup>9</sup>

Stephen King’s writing regimen is instructive in this regard. This is an author, remember, who has published 64 voluminous novels and several hundred short stories, to say nothing of copious screenplays, numerous newspaper columns, countless paratextual comments on previously published books, which are included in each new edition, and, in addition to an always-on social media presence, maintains a vast correspondence with countless admirers – he calls them Constant Readers – and would-be bestselling authors seeking advice:

I used to tell interviewers', he writes, 'that I wrote every day except for Christmas, the Fourth of July and my birthday. That was a lie ... The truth is that I write every single day ... [and] that includes Christmas, the fourth and my birthday (at my age you try to ignore your goddam birthday anyway).

He has a target of 2000 words per day, what's more, and keeps writing till he gets them. 'Only under exceptional circumstances,' he adds, 'do I allow myself to shut down before I get my 2000 words' (King, 2000b, 176).

And while 2000 words may not seem like a lot, it's more than 700 000 per annum. Even Russ and Cele, hard chargers that they are, might struggle to surpass that.

### **Guard Dogs**

When you scratch below the surface of a scholar – it's not a pleasant job but somebody has to do it – you don't have to dig very far to find a sore spot or several. These sore spots have a common cause: reviewers. Everyone has a horror story about being beaten up by their reviewers and more than a few of us have been bludgeoned by write supremacists wielding metaphorical baseball bats or iron bars, though waterboarding is not unknown in extreme cases. They also possess weapons of mind control that make the CIA's psych-ops department seem like Santa, the Easter Bunny and the Tooth Fairy combined.<sup>10</sup> Or, come to think of it, akin to something from a Stephen King story – *The Mist*, maybe, or *Cujo* perhaps. The latter, in fact, is a cuddly puppy compared to the Cerberuses that guard the portals of eminent academic journals. Snarling, slavering and singularly sanguinary, they're the three-headed reviewing 'team' that must be tamed before publication, either by frontal assault, though that can be suicidal, or by flattery, charm, sycophancy and effusive thanks for their 'helpful comments'. Never forget, though, that they are steely-eyed, cold-hearted article assassins, without a shred of remorse, much less regret. Even the biggest beasts in our business, as Sherry's (2022, 7) poem 'Fuck You Very Much, Reviewer C' makes clear, bear the scars, the bruises, the broken limbs and hearts that the guard dogs of top-tier journals inflict.

Now, no one would deny that a second opinion of one's writing by a sympathetic reader is more than welcome and very necessary. Authors aren't the best judges of what they write, as King himself acknowledges in *On Writing*, where he admits to using his better half as a sounding board. They're too close to it, too much in love with their scintillating ideas, precious prose and, cough, alliterative riffs that only the writer can love. The problem is that there are at least three reviewers, plus an Associate Editor, who are duty bound to demand changes, since to do otherwise implies lack of diligence on their part. The resultant manuscript suffers from the too-many-cooks syndrome and reads like it was written by a committee. Which it was. Worse, it was written by a committee who, despite claims to the contrary, 'know what they like and like what they know', which militates against the unorthodox, the radical, the game changing and perpetuates the same old same old. It delivers lowest conservative denominator writing when the highest creative factor is called for.

On top of that is the feet-to-the-fire tenet, the frankly absurd belief that those who submit papers to the premier journals must go through the fires of hell before acceptance. Only those who survive this macho-man ordeal are worthy of inclusion. It's supposed to be a type of tough love, I suppose, but it's really a form of bullying, browbeating, high-grade hazing. It stems, I suspect, from our discipline's long-standing 'scientific' aspirations, our

hard facts-focused, rigorous research-reliant, empirical data-driven, taste-the-testosterone, feel-the-fear, smell-like-a-man-man mentality.

But one thing is for sure: it's not unbiased. As the former editor of the *British Medical Journal* acknowledges: 'peer review is slow, expensive, inefficient, poor at detecting errors or fraud, prone to bias and something of a lottery. It is also anti-innovation, in that truly original studies that win Nobel prizes are often rejected' (Smith, 2022, 12).

### Glorious Gratification?

Given the foregoing, it's tempting to conclude that the writing game is a grotesque and ongoing act of self-harm, not to say self-abuse. If I were forced to come up with a conceit for the writing process as a whole, I'd be seriously tempted to conceptualize it as a maze or labyrinth. Those how-to-do-research flowcharts that you sometimes see in textbooks – linear, logical, step-by-step, stage-by-stage from reviewing the literature to writing it up – are nothing like messy, murky reality. In the real world, we blunder around in the semidarkness, we backtrack, we stop dead, we take wrong turnings, we lose our sense of direction, we wish we were somewhere else, we wonder why we ever entered the hellhole in the first place and whether we're ever going to get out of the shitpit with our sanity intact. And some of us don't have too much sanity to start with. And then there's that Minotaur in the middle – aka the reviewing team – who is going to tear us to pieces. And if we survive that initial act of savagery, we get deposited in a different part of the maze and told to try again. And again. And again, our wounds dripping all the while until we expire from our injuries. Meanwhile, to mix my metaphors for a moment, there's a secret entrance, an inside track, an express lane, like those for airport security, for the favored few, those in the know, as well as an executive lounge for AE's and their doctoral offspring, a lounge where Minotaurs are debarred. Or so scholarly conspiracy theorists contend.

Mixed metaphor notwithstanding, the pertinent thing about this imagined maze is that, as per the myth, Theseus killed the Minotaur and, thanks to Ariadne's red thread, found his way back to the surface, safe and sound. Granted, the slimeball jumped ship at Naxos and left Ariadne behind, mourning her take-the-honey-and-run lover man. But he was no loss. Nowadays, she's a feminist icon, a #metoo role model, a #timesup pinup, a much-admired archetype of 'the woman wronged', Theseus, by contrast, is considered a titan of toxic masculinity. The Minotaur, meantime, remains a ruthless revenant on retainer, the researcher who reviews my papers for *JCR* or whatever. Every so often I overcome the creature, though my victories are getting fewer and further between. But the wins when they come are incredibly gratifying. I love the smell of 'acceptance' in the morning. It's especially fragrant after four or more rounds of being punched in the snozzle, while wearing a blindfold, by assailants unknown.

That said, even the most robust writers are worn down by the succession of injuries inflicted over the years. Death by a thousand cutting remarks and debilitating R&Rs. And while it could be argued that what doesn't kill us makes us stronger, per the cliché, it most definitely doesn't make us better disposed toward others, people like ourselves lost in the labyrinth. The price of individual gratification is communal degeneration.

## GET THIS

Rather than end on a negative note, let me conclude this weepie about writing with a heart-warming yarn. Consider it a little gift, a gratuity, something to thank you reading thus far in a very lengthy volume that sits heavy in the hand. And heavier still in its content. The Sears catalogues of yore were pamphlets by comparison. But unlike Sears' much-loved 'wish books', every word of this story is true. I know that because it happened to yours truly. The takeaway, I can tell you in advance, is that Minerva, the Ancient Roman goddess of writing, occasionally takes pity on her supplicants and throws us a tiny tintinnabulum of good luck.

Many years ago, in a moment of megalomaniacal madness, I decided to submit a paper to the *Harvard Business Review*. As you know, *HBR* receives bazillions of paper proposals per year and rejects 95 percent of them. However, I was working on *Harry Potter* at the time and, as Harry mania was in full spate – we're talking peak Potter here – I thought I'd give it a go.

So I prepared my paper proposal as per the specs on the *HBR* website and emailed it off as an attachment. Before clicking send, however, I made one tiny change to the covering letter. The accompanying email, I should say. It originally said Dear *HBR* and then briefly explained why the attached proposal was worth considering. Well, I think I must have been watching *Gladiator* on DVD or some such, because at the very last second, I changed the salutation from Dear *HBR* to Hail *HBR*! Afterwards, I was kicking myself for being so stupid. What on earth were you thinking, Stephen?

But lo and behold, six weeks later I got a reply from the editor. Hail Stephen Brown, it said. It was that one word that got me accepted for publication. I know this for a fact, because the rest of the editor's email basically said we're not interested in your crappy paper proposal; but we are interested in *you*. We like the cut of your jib. We want you to write for us. At the time, *HBR* was being radically revamped under a new editor and, unbeknown to me, I was the sort of person they were looking for. They wanted a bit of Irish rough. And they don't come much rougher than me.

So I wrote them a paper. It was accepted after a tweak or two. Better yet, it won the *HBR* Breakthrough Award for that particular year and was later republished in the journal's *Best of Marketing* anthology. For once in my career in the Colosseum of marketing scholarship, I got the thumbs up ...

Tempting as it is to end on this happy-clappy note, with a few woo-woo words about never giving up, failing forward and so forth, they're no consolation for those at the receiving end of rejection. I've been there too often (Brown, 2023). Let's try some tough love instead. Stop reading. Right now. Step away from this book. Go write something, you wuss!

## TALKING BLUES

For what you are about to receive, may the Lord make you truly thankful. What lies beneath is not the saddest story you'll ever hear, à la Ford Maddox Ford, but hopefully it'll serve as a cautionary tale. When the editors asked me to contribute to this anthology, they allocated writing and presenting to yours truly. Their thinking, as ever, made eminent sense, since writing and presenting are intertwined. We write our learned articles and discuss the findings with friends for feedback. We submit conference papers hither and yon and, after acceptance, astonish the audience with our startling discoveries. We accept invitations to give guest lectures, or deliver keynote speeches or participate in panel discussions, where

our papers provide the basis of our palaver. Sorry, I meant ‘profundities ...’

Presenting in some form or other is a necessity for even the most noble, Nobel-garlanded writers, since publishers demand that they publicize their latest, hot-off-the-press work of art at literary festivals, in bookstores, on TikTok, Twitter or Insta, through podcasts, via a variety of video content, by means of multi-city book tours, plus post-talk signing sessions, and in the case of Stephen King, on early-morning or late-night talk shows and radio programs. Presenting is increasingly regarded as an essential aspect of authorial brand building.

But when Russ’n’Cele kindly invited me to contribute a chapter on writing and presenting, I wasn’t sure whether to accept. The former I could cope with, though my views might be unpalatable to some. The latter was another matter entirely. So I demurred. And why? Because I no longer make presentations. Yes, I continue to fulfil my university teaching duties, but all ‘outside’ invitations are politely declined. I don’t give talks. I don’t go to conferences. I don’t accept guest speaker offers. I never ever interact with the media. Accordingly, I am unwilling to write about something I don’t do. Can’t do, I should say.

As an introverted sociophobe, I’ve always struggled with ‘other people’, and a crowd of other people, for me, is the nearest thing to hell this side of the grave. The second nearest, I should say. Having to talk to them, or make a speech in front of them, is a horror story beyond Stephen King’s wildest imaginings. The first few years of my career involved a lot of sleeplessness, nightmares beyond number and anxiety levels that, if not quite off the scale, were well into the red zone. These difficulties were compounded by the fact that I was teaching on a part-time master’s degree, where all the students were older than me and many had extensive business experience. I had none, bar being a bartender who couldn’t pull a pint properly and a short order cook in a burger van, before being unceremoniously sacked. Yours is not to wonder why.

After a couple of years dying on my feet in front of the master’s students, I had a Damascene moment, a sudden realization that the ‘person’ who delivered their lectures wasn’t the ‘real me’. It was a persona, a role, a part, an act, a performance. And, having inadvertently learned to separate my ‘self’, it dawned on me that I could do whatever I wanted with the person, the presenter, who was ‘not me’. So I decided to make him confident, charming, charismatic and comedic. I started to write scripts for ‘him’, some for lectures, some for seminars, some for conference presentations, etc., etc.

These weren’t lists of points to get across, BTW. They were full-length scripts, complete with pauses and ad libs and stage directions. And all of which were rehearsed assiduously until I was word-perfect. This typically took the best part of a month for big conference presentations and always involved several full-scale dress rehearsals in an empty auditorium on Sunday afternoons. Suffice it to say, a lot of cursing, swearing and kicking inanimate objects transpired as I struggled to remember my timed-to-the-second script.

In due course, of course, I fell into the ‘improvement trap’; the syndrome that sportspeople suffer in their search for ever-better times, ever-more improvements, ever higher levels of performance. It was madness. I couldn’t escape. I had to keep coming up with something bigger and better and, above all, funnier. It got to the point where I’d spend two weeks prior to the presentation in a bottomless pit of anxiety. And two weeks afterwards wrapped in a blanket of self-loathing. I got no pleasure whatsoever from the occasion.

So, after the CCT conference in Odense, I decided to call it a day. Bar university teaching duties, I haven’t spoken in public since. I feel better for it, much better.

But boy did I love hearing a big audience roaring with laughter at one of my jokes. There is nothing, absolutely nothing, more exhilarating. Happy days.

## NOTES

1. It was so favorite, in fact, that King used it himself in ‘*The Mist*’. Cain’s hay-truck chuck, meanwhile, is the epigraph of *Mr. Mercedes*.
2. My personal pick of his opening sentences is, ‘Oh! Oh, Jesus! Gross!’ (*Desperation*).
3. The technical term for the ‘stuff at the start’ is paratext (Hackley and Hackley, 2022).
4. The Elephant House café, which overlooks George Heriot’s School, an alleged model for Hogwarts, also claims to be Rowling’s writing spot way back when.
5. Posture is important for some writers – standing up, lying down and so on – as are places; rooms, sheds, retreats, etc.
6. Cele swears by George Saunders’ (2021), *A Swim in a Pond in the Rain*. Russ recommends Wolcott’s (2001) *Writing Up Qualitative Research*.
7. For every less-is-more ‘taker out’, such as Samuel Beckett, there is a more-more-more ‘putter in’, akin to James Joyce (King, 2000b, 267).
8. ChatGPT wouldn’t struggle to replicate our articles. ChatCCT is in development, no doubt. This chapter was cranked out by a beta-version of ChatSFX. The named ‘author’ accepts no responsibility, and bears no blame, for its contents.
9. I don’t play Tetris, FYI. I got that score from Google.
10. I’m thinking, for example, of comments like ‘this is just a suggestion that you can ignore’. Whatever you do, amigo, *do not* ignore this suggestion!

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