

RUSSELL BELK, EILEEN FISCHER  
AND ROBERT V. KOZINETS

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# **QUALITATIVE CONSUMER & MARKETING RESEARCH**

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Los Angeles | London | New Delhi  
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Typeset by: C&M Digital (P) Ltd, Chennai, India  
Printed by MPG Books Group, Bodmin, Cornwall



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2013

First published 2013

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**Library of Congress Control Number: 2012939638**

**British Library Cataloguing in Publication data**

A catalogue record for this book is available from the British Library

ISBN 978-0-85702-766-5

ISBN 978-0-85702-767-2 (pbk)

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# 1

## Introduction

### An introductory exercise

Suppose that you wanted to understand the changing meanings of the greeting cards in twenty-first-century London. You are particularly concerned with these meanings and uses among young single adults aged 18–30 who are more likely to be online, socially active, and looking for work or embarking on careers and advanced education. You know that e-cards are increasingly popular, but wonder whether both e-cards and traditional paper cards are likely to be seen as old fashioned by this target group. You also know that Greater London is culturally diverse and composed of many ethnicities and subcultures. And you know that the answer to your question is likely to differ over various card-giving occasions and non-occasions as well as over different types of relationships. How might you go about answering your question? See if you can think of at least one study using each of the following methods:

- survey research administered online;
- focus group discussions;
- observational research;
- individual depth interviews;
- a study of online material in forums, discussion groups, and social media;
- archives of the records of a subscription service offering online greeting cards and gifts.

Try to detail how you would go about conducting the study and what you would observe, ask, or analyse. If you could only use one of these methods, which would you choose? If you could use three of these methods, which three would you use and in what order would you use them? Jot down some notes

about how you would conduct and use each of these types of studies, then put your notes in a safe place. After you have completed reading this book or a substantial portion of it, return to these notes and see how you might respond to the exercise at that point. We anticipate that you may well formulate the research differently after reading the chapters that follow and participating in other exercises along the way.

This book has one relatively straightforward goal. We want to help you develop skills in doing qualitative research. Our aim is to provide practical advice that will be valuable to you, whether you are a budding scholar, a budding practitioner, or someone who has been dabbling with qualitative methods (whether in academe or industry) and who wants to get better at using them.

This book also has some slightly more ambitious goals. We want to help promote a wider understanding of the differences, as well as the commonalities, in the ways qualitative research is conducted depending on the purposes for which you are using it (such as to develop a communications strategy for a new product versus to write a journal article for publication). For those doing qualitative corporate research addressing applied business problems, we want to highlight guidelines for what makes effective research. For those who are doing qualitative research and hoping to publish it in academic journals or books, we want to provide some guidance on different traditions that have evolved among scholars studying consumers, markets, and marketing. Depending on which tradition(s) a scholar or corporate researcher works in, they might well collect different types of data and do different kinds of analyses to build theory. The nature of theory itself also differs across contexts. So if this book is to achieve its straightforward goal of helping you do better qualitative research, it needs to pursue these distinctions in the purposes of the research you wish to do.

## What makes qualitative research different from quantitative research?

To take the first step toward achieving all our goals, we begin by telling you what we mean by qualitative, versus quantitative, research. First, we point out something they have in common. We believe that *all* research is interpretive, whether that involves interpreting patterns in relationships between quantified observations or in recurring patterns in talk, text, images, or action. Thus we do not consider being interpretive something that distinguishes qualitative from quantitative research. So what *is* different? Table 1.1 summarises the basic differences that we will discuss here. Other, more nuanced differences will become clear in the chapters that follow and are also discussed by Sherry and Kozinets (2001).

**Table 1.1** Qualitative versus quantitative research differences

	<i>Qualitative</i>	<i>Quantitative</i>
<b>Nature of data</b>	Visual and verbal recordings in rich detail	Responses distilled into numeric scores
<b>Relevance of context</b>	Results are generally assumed to be specific to time, place, people, and culture studied	Results are generally assumed to be generalisable across contexts and cultures
<b>Nature and control of potential causes</b>	Ideally naturalistic with multiple factors shaping the behaviours observed and discussed	Ideally settings are controlled and variables are manipulated or measured to allow simple causal inferences
<b>Key research instrument</b>	The researcher is the instrument and uses skills and rapport to gain insights based on trust	Researcher tries to be invisible and relies on responses to structured measures or choices

*Richly detailed data, not quantified data.* One rather obvious but salient characteristic of qualitative research that is distinctive is that it entails, primarily, the analysis of data that has not been quantified. This is not to say that qualitative researchers never provide numbers to support some aspect of their analysis; it is perfectly acceptable to include numbers in a supporting role. However, the core contribution of a piece of qualitative research lies not in reducing concepts to scaled or to binary variables that can be compared and contrasted statistically based on the assumption that they provide meaningful measures of the behaviour they seek to understand. Instead, it builds upon detailed and nuanced observation and interpretation of phenomena of interest. Doing so requires a commitment to illustrating concepts richly, whether with words or images or both.

*Contextualised rather than decontextualised.* A second, related, characteristic distinguishing qualitative research is that it is contextualised: it takes into account the cultural, social, institutional, temporal, and personal or interpersonal characteristics of the context in which the data is collected. While quantitative research may sometimes be contextualised, it is often the case that quantitative data from distinct contexts are gathered and combined, and that interpretations stress that which is assumed to be generalisable across times and places. In qualitative research, data are frequently gathered from a single context or a narrow range of contexts, and immense care is taken to understand how the context matters to the phenomena under consideration. Theoretical claims and managerial insights developed from qualitative data analysis are thus based on characteristics of the context, and it is common for qualitative researchers to circumscribe the

domain within which their findings are applicable as a result of the context of the research. For example, a doctoral student in our department, Mandy Earley, is currently doing research on the activists in the Occupy Wall Street movement in New York City. Both the time and place in which this observational and interview data are being gathered constrain attempts to generalise to Occupy movements in other times and places.

*Naturalism versus control.* A third characteristic is that when qualitative research entails interviews or observations, these are often conducted in settings where people live, work, play, shop or just hang out rather than in settings that are controlled by the researcher, such as laboratories. While exceptions do exist, it is normal for qualitative researchers to try to observe and interact with people in the contexts that shape their everyday behaviours and perceptions. This 'in situ' characteristic of qualitative research contributes to its ability to capture insights that cannot easily be communicated by people who take for granted what is going on in the settings they frequent. And it means that qualitative researchers can often learn things that the people they study may not be able to articulate. For example, one of us (Eileen) is currently observing entrepreneurs' use of Twitter to communicate with stakeholders. She interviewed them first to see what they explicitly state about why and how they communicate. Her analysis thus far shows recurrent patterns in the tweets of some entrepreneurs, such as the use of intensely emotional language. These emotion-laden tweets would not have been anticipated based on interviews alone, and variation in emotional language usage would not likely have been considered for inclusion in a controlled experiment on social media based corporate communication. In this project as in many others, the naturalism of observing actual behaviours affords insights that would otherwise have been missed.

*Researcher as instrument versus detached instrumentation.* A final point of differentiation between quantitative and qualitative work concerns the researcher's relationship to the data. With quantitative research, care is taken to create instruments (such as questionnaires) that are meant to reduce the impact of the researchers on the data that is collected. In qualitative research, the researcher is the primary instrument of data collection. The researcher's skills in building trust as well as in hearing and seeing what is going on in a setting, and in asking questions that could not have been anticipated prior to immersion in the setting, are crucial to the success of a qualitative project. Rather than the hands-off and distant approach of most quantitative research, the qualitative researcher develops a deep connection to the context being investigated and often builds a relationship with those being studied.

## Why is qualitative research so valuable?

All three of us have immense respect for the insights that quantitative research can yield. But as people who have spent most of their professional lives using qualitative methods to understand the things that interest us, we are convinced that qualitative research is invaluable because it provides unique insights into *how* consumers, marketers, and markets behave, and into *why* they behave as they do.

Take Christmas gift shopping as an example. In particular, let us try to understand how the Christmas shopping gets done, and why the work of gift shopping tends to get divided rather unevenly in so many families, with women doing the bulk of the work in households that include heterosexual couples (Fischer and Arnold 1990). Quantitative approaches are excellent for measuring variables such as how many gifts each member of a household purchases, how many hours the adults spend shopping, how much money they spend per gift, and how many 'self-gifts' each person buys as they shop for other people. They are also great for looking at patterns of association between social psychological variables (such as gender-role attitudes or gender identity) and specific shopping behaviours.

But qualitative research can help to identify the cultural discourses and market place mythologies that infuse shopping activity with meaning. They can help us understand that Christmas gift shopping has, in North America, been socially constructed as an extension of the feminised work of caring for and perpetuating the ties that matter to families. They can help us, too, to understand the varied experiences recounted by people who enjoy the 'fun' of Christmas shopping in the intensified retail environment that builds to a peak in the weeks leading up to 25 December, compared with those who dread the harried overload of work that Christmas shopping entails, and who attempt to incorporate gift search into their routines throughout the year (Fischer and Arnold 1990). They can also help us understand what consumers mean when they refer to a gift recipient who is 'difficult to buy for' – and to appreciate that consumers feel someone is easy to buy for when they can fulfil certain desirable social roles by shopping for them (Otnes et al. 1993).

As this example illustrates, quantitative approaches are neither inferior nor superior to qualitative ones. Whether you are a marketer trying to help stressed-out women 'cope' with Christmas or a scholar attempting to understand the persistence of patterns of gendered division of labour, when it comes to complex everyday phenomena, quantitative and qualitative methods can be invaluable complements.

## Why is it important to learn to do qualitative research now?

We believe that there has never been a time when it has been more important for qualitative marketing researchers, whether they are practitioners or scholars, to develop and refine their skills in doing qualitative research. Why do we make this assertion? There are several reasons.

First, the contexts where qualitative methods can be fruitfully applied are evolving rapidly. In particular, the burgeoning range of online activities in which consumers and marketers are engaging – whether they are networking via social media sites, making exchanges in online markets, or sorting out complaints via company websites – means that there are abundant new contexts where qualitative data can be collected and where new insights into consumption and marketing can be generated. A related factor that is leading to an explosion of new research contexts is the growing appreciation of the need for investigations of contexts outside more economically developed, formerly ‘first world’, countries. And qualitative methods are well suited to investigating consumer and marketing phenomena within cultural contexts that have previously been overlooked, or across cultural contexts that vary dramatically from one another.

Second, among marketing managers, there is a growing appreciation for the insights that skilled qualitative researchers can bring to bear. The types of qualitative research that managers are commissioning extend well beyond the traditional focus group, encompassing ethnographic interviews, netnographies, pantry studies, shop-alongs, and much more, as we discuss in Chapters 4, 5, and 8. At the same time, the standards by which managers are judging the quality of the research they commission continue to be demanding. Those who provide qualitative research services are required to be able to tailor their approaches and integrate new techniques for data collection on a continual basis. And, regardless of their techniques or data sources, they need to be able to provide inspiring interpretations that facilitate managerial decision-making. In fact, growing competition in most industries and the continual ‘scientising’ of professional managerial functions in global businesses have led to increased demand for data analysis that cuts across every type and form of data. Business has a bottomless appetite for quality data to inform its decisions. It is these developments, along with a growing sense of the need to get a deeper understanding than numbers alone can provide, that seem to account for the rise of qualitative marketing research methods at a time when scanner panel data, online analytics, and other quantitative measures of consumption and competition are more readily available and abundant than ever before.

Third, for scholars working in the fields of consumer behaviour and marketing, there are many more publication outlets that accept qualitative manuscripts for consideration and that publish a number of qualitative papers each year. Although a small (and decreasing) number of journals cling stubbornly to biases against all qualitative research, the good news is that the majority of so-called top tier publications are now open to publishing qualitative research if reviewers can be satisfied that a manuscript features qualitative data that are rich and relevant, incorporates data analysis that is systematic and thorough, and offers theoretical contributions that are insightful, original and important. The same is true for outlets for videographic consumer and marketing research, as discussed in Chapter 9. Consumer research film festivals, special DVDs and online issues of journals, refereed online video streaming websites, and various broadcast and narrowcast outlets all have a hunger for good quality videographic work.

One challenge – and this is also an opportunity – for scholarly qualitative researchers lies in understanding what any given set of peer reviewers will regard as an insightful form of theoretical contribution. Although there may be considerable consistency in judgments of whether data are rich and relevant, and some consensus on how an analysis can be credibly constructed, there is considerable disparity between communities of qualitative researchers as to what constitutes an insightful theoretical contribution. We will elaborate on this point in Chapters 7 and 8, but here we want to make the point that, if you are going to publish qualitative research, you will be ahead of the game if you start from the premise that there is no one gold standard when it comes to how you should craft a theoretical contribution. Rather, there are diverse sets of practices that you can learn to identify and adapt to depending on where you want to publish. For instance, within some leading journals, the normal way of expressing theoretical contributions is by creating an inventory of propositions; in others, propositional inventories are virtually taboo and findings are expressed in terms of inter-related themes. We believe that the diversity across communities of qualitative scholars is too often glossed over, and that a practical guide such as ours will benefit readers most if we not only tell you about the techniques you may use to gather qualitative data and the approaches you may take to analysing it, but also about the different trajectories of qualitative research practice that have evolved when it comes to crafting contributions.

Qualitative researchers who have a foot in both industry and academe also need to appreciate that the conventions for conveying contributions in these two fields of practice vary considerably. All three authors of this book currently are or have recently been associate editors at top journals in the field. All of us have a wealth of experience as authors and reviewers. In addition, we have also been involved in industry enough to be able to offer perspectives from a range of



different and even divergent perspectives. So we are equipped to offer guidance that should help you gain traction in doing qualitative research that will be well received by your intended audiences.

## Qualitative research in marketing: a brief history

To appreciate the current practice of qualitative research in marketing today, it is valuable to consider how and when qualitative approaches started to gain currency. In order to do so, we need to distinguish between the fields of academe and industry, since qualitative research of certain types were granted credibility among marketing managers long before it became possible to publish qualitative work in scholarly journals.

### The evolution of qualitative market research in industry

Marketing historians identify the 1930s as the decade during which qualitative approaches to applied marketing research first gained recognition (Levy 2006; Kassarian 1995). In particular, Paul Lazarsfeld, a native of Austria and a leading figure first in European and later in American marketing thought, produced studies through his Institute for Economic Psychology that included systematic analysis of hundreds of interviews conducted with consumers (Fullerton 1990). His approach entailed both probing, detailed questioning of interviewees, and the meticulous collection of survey data. His study 'Shoe Buying in Zurich' is regarded as a classic of market analysis (Fullerton 1990).

Lazarsfeld outlined his meticulous approach to collecting and interpreting consumer data, drawing heavily on the psychological insights of Freud and others, in papers published in the *Harvard Business Review* (Lazarsfeld 1934) and elsewhere. He also popularised his approach by training students, the most (in)famous of whom was Ernest Dichter. Dichter carried out qualitative analyses of such iconic brands as Ivory Soap, and was a leader in the psychoanalytic tradition of qualitative work that came to be known as 'motivational research' (Dichter 1947). Dichter's style was 'free-wheeling' in comparison with that of his mentor Lazarsfeld, but his popularity among executives was unrivalled (Durgee 1991; Levy 2006; Parkin 2004; Stern 2004).

Under the auspices of Social Research Inc. (SRI), which was established in 1946, more qualitative research techniques such as projective methods and ethnographies were adapted for use in analysing meanings in product categories such as greeting cards and radio soap operas. During the 1950s, qualitative studies of consumers' motivations for buying and using beer, cigarettes, soap, detergents,

and automobiles were commissioned by *The Chicago Tribune* and publicised widely in presentations to industry leaders. Sydney Levy, who joined SRI in 1948, recounts using interpretive lenses informed by the work of semioticians and psychologists to understand how people ‘symbolise their lives in the products and brands they consume, and how they tell each other stories in pursuit of their aims’ (Levy 2006, p. 8).

Of all the qualitative methods that gained currency among practitioners, none achieved greater popularity than the focus group, which remains a mainstay of applied market research to this day. Pioneers of the focus group method were Lazarsfeld and his colleague Robert Merton who used them to investigate the impact of media on people’s attitudes toward the involvement of the United States in the Second World War (Merton and Kendall 1946). Lazarsfeld and Merton invited groups of people to listen and respond to radio programmes that had been designed to encourage support for the war effort (Merton 1987). Originally, the participants were asked to push buttons to indicate whether their responses were positive or negative. However, this data could shed no light on why participants responded as they did, and in later studies an alternative approach for conducting group interviews was developed to give qualitative voice to participants’ views through semi-structured questions that moderators posed to small sets of people gathered around a table (Stewart et al. 2007). While academic researchers have had more interest in individual interviews, commercial market researchers began embracing the focus group method in the 1950s and 1960s. Indeed, so popular is the focus group that the data collection technique has verged on being synonymous with qualitative market research among those who commission such research (Robson and Foster 1989).

Considering the reasons behind the popularity of focus groups, however, helps to shed light on some of the challenges that qualitative research has faced in the practitioner community. Bluntly put, the credibility of qualitative work – including but not limited to focus groups – has been strained in part because it has frequently been regarded as a quick (and therefore cheap) alternative to survey research. Those familiar with the effort required to do good qualitative work will know that thoughtful analysis of qualitative data is rarely fast and is often quite time consuming. When analysis is done quickly, it may well be done superficially. And the superficial quality of much qualitative analysis has long been of concern to proponents of qualitative methods. This problem dates back to at least the 1950s when Lazarsfeld cautioned that expedient approaches to analysing qualitative data were becoming too common, and would lead to a deterioration of the reputation of qualitative research (Catterall 1998).

Although qualitative research continues to grow in terms of market share, its status has often been contested. Catterall (1998) contends that the market research industry thinks of qualitative research as an exploratory complement

to its more rigorous and reliable counterpart, quantitative research. Morgan and Krueger (1993, p. 9) note that among market researchers the prevailing myth has been that 'real research' is quantitative.

Catterall (1998) also points out that practitioners of qualitative research bear a partial responsibility for its beleaguered image. For example, she notes that many who make their living via qualitative research have difficulty refusing to comply with a client request for one or two focus groups even when such group interviews may be inappropriate given the client's expressed needs. As another example, she notes that researchers have difficulty refusing client requests to be present during interviews, even though the presence of client observers behind one-way mirrors may have a deleterious effect on the data obtained. Thus, in part due to practised prejudices against qualitative work and in part due to occasionally inappropriate data collection techniques and impoverished analyses that fall short of professional ideals, there remains some variability in the perceived legitimacy of qualitative research among commercial users.

### The evolution of qualitative research in marketing academe

It was during the late 1970s and early 1980s that marketing and consumer researchers began to engage in vociferous debates about the sufficiency of logical empiricism, and of the quantitative methods used in theory testing (e.g., Anderson 1983). Influential sociological work published in the 1960s such as Berger and Luckmann's *The Social Construction of Reality* (1966) and Glaser and Strauss's *The Discovery of Grounded Theory* (1967) helped to provide a focus for the discontent that some scholars felt with prevailing quantitative methods. And reflection on the philosophy of science and on the related questions of methodology may well have been further sparked by dynamics in other business disciplines (in particular organisational research) where Burrell and Morgan's 1979 book *Sociological Paradigms and Organisational Analysis* and Van Maanen's 1988 book, *Tales of the Field*, inspired many emerging scholars in management and organisational theory departments to experiment with qualitative methods as a means of generating new theory.

Whatever the sources of inspiration, the mid- to late 1980s saw a proliferation of articles signalling that marketing and consumer research scholars wanted the latitude to pursue alternatives to the dominant survey and experimental methods. Several examples (listed in chronological order by date of publication, and restricted to the 1980s) illustrate the range of forays that were made:

- Bonoma (1985) argued that inductive case research should be considered a valid alternative to typical deductive research approaches.
- Holbrook and Grayson (1986) performed a semiotic analysis of the consumption symbolism in a motion picture.

- Hirschman (1986) advocated 'humanistic inquiry' in marketing research.
- Russ and colleagues including John Sherry and Melanie Wallendorf travelled across the USA in 1986 on a consumer-behaviour 'Odyssey' that entailed both depth interviews and site-specific participant observations leading to papers illuminating, for example, the functioning of swap meets (based on the 1985 pilot study – Belk et al. 1988) and the simultaneously sacred and profane nature of consumption (Belk et al. 1989). The project is summarised in Belk (1991b). See Bradshaw and Brown (2008) for a further, if more speculative, account.
- Wallendorf and Arnould (1988) undertook comparative ethnographic research to explore how object attachment, possessiveness, and social linkage varied across cultures.
- Witkoswski (1989) published a historical analysis of colonial consumers' values and behaviours during the non-importation movement (1764–1776) based on archival data.
- Stern (1989) made the case for performing literary criticism of advertising rhetoric; and
- Thompson et al. (1989) advocated the technique of existential phenomenology.

Lest it seem, however, that the acceptance of qualitative research by marketing academics was seamless, we should note that considerable antipathy was voiced by leading scholars. For example, Calder and Tybout (1987) suggested that qualitative research could yield 'everyday knowledge' but that 'scientific knowledge' relies on quantitative methods that offer 'scientific progress'. And Hunt (e.g., 1990) launched several attacks on those advocating any form of critical relativism that supported qualitative research undertakings.

Overt criticism of qualitative research waned in the early 1990s and the number of qualitative papers accepted for publication in top journals such as the *Journal of Marketing*, the *Journal of Consumer Research*, the *Journal of the Academy of Marketing Science*, and the *Journal of Retailing* has increased steadily. The acceptability of qualitative research in marketing and consumer behaviour outlets is improving, and better than it ever has been, giving us room for considerable optimism.

However, our optimism about the prospects for qualitative research is tempered by the fact that there is, unfortunately, still a subtle but pervasive bias against qualitative research in marketing's academic circles. It would be a mistake to assume that qualitative research methods are uniformly viewed as equally as legitimate as quantitative methods. As one indication of this institutional imbalance, it is instructive to note that one of marketing's most prominent journals (the *Journal of Marketing Research*), though it has published a small number of papers describing various types of qualitative data collection and analysis, has published only one paper based solely on qualitative data that offers a theoretical rather than a methodological contribution (see Workman 1993). As another indication, there are marketing departments in many business schools (among them some of the most prominent schools in the world) that have yet to hire a single qualitative researcher. In addition, those that have more than a single qualitatively-oriented scholar on staff are rare. As a final indication, although it

is nearly universal that doctoral students in marketing and consumer research are trained in quantitative methods, most new scholars in the field still graduate without having ever taken a course in qualitative methods.

Qualitative researchers are acting deliberately and decisively to counter these institutional barriers. In the last decade, considerable progress has been made at institution building. The label 'consumer culture theory' (CCT) (Arnould and Thompson 2005, 2007) has been adopted as a brand name by many who do qualitative research. An annual CCT conference designed to feature and foster qualitative research was launched in 2006; it has grown in size and quality in each year since. And senior scholars have taken a strong interest in helping to establish networks to assist students in this area. Training grounds across the world have been established to provide doctoral students and junior scholars with opportunities to learn qualitative methods and to become familiar with theories of particular relevance in CCT research (for example at Bilkent University in Ankara, Turkey, the University of Southern Denmark in Odense, York University's Schulich School of Business in Toronto, and NHH in Bergen, Norway). And there are a number of other leading marketing departments where qualitative research is nurtured and encouraged (for example, the University of Bath, the University of Exeter, Euromed Management in Marseille, the University of Wisconsin-Madison, and the University of Arizona).

These efforts appear to be having the desired effect. For example, publications that take stock of the field, such as McInnis and Folkes (2010), affirm the value and equal status of CCT work and show how it complements and enhances the value of consumer research as a whole. Editorial teams at the *Journal of Marketing* and the *Journal of Consumer Research* have been openly and vocally supportive of quality qualitative research and back up their support with pages of publication. And there are increasingly high quality venues for qualitative work, such as the *Journal of Consumer Culture* and *Consumption, Markets, and Cultures*. We hope that this book not only helps to educate new qualitative researchers but also contributes to the body of work that demonstrates the value and legitimacy of qualitative research. Our cautionary notes should by no means discourage students from using qualitative methods. Rather, they should highlight the payoffs from being well versed in the rationales for qualitative research.

## An overview of this volume

This chapter is meant to provide some insight into the current opportunities and challenges facing qualitative researchers. It also gives a sense of the history of qualitative research in marketing that preceded and has helped give rise to the current 'state of the art'.

The second chapter is designed to get you started in undertaking a qualitative research project. It addresses some of the differences that face a researcher commencing an applied project for managerial purposes and those that face someone at the outset of a scholarly project. It covers the key considerations that scholars must take into account when they are choosing research questions, and it looks at the kinds of research questions that can (and cannot) be answered with qualitative research. This chapter also introduces the notion of the varied 'research traditions' that undergird several different types of qualitative research, and identifies the approaches to data collection that fit best with particular traditions.

The next four chapters provide guidance for the process of collecting qualitative data. Chapter 3 discusses the art of the interview. It tells you how to prepare for an interview, and provides guidelines for conducting a depth interview. It also outlines how projective methods, such as word association, sentence completion, and picture drawing can be used to augment the standard interview. It also provides insight into the ZMET technique developed by Zaltman for identifying metaphors that encapsulate consumption experiences.

Chapter 4 addresses the collection of observational data and describes how to engage in ethnographic participant observation. It complements Chapter 3 by discussing how to conduct interviews that are part of an observational study. And it discusses the use of 'aids' to observational research such as pictures, videos, and closed-circuit television. It also discusses some of the observational techniques, such as trend-spotting, that are gaining particular favour among practitioners. Chapter 4 also discusses archives and material artefacts as sources of historical qualitative data for researching consumption of the past.

Chapter 5 details how researchers can employ the techniques of observation, participation, and interviews in the collection of online data. It gives valuable insight into the kinds of online data that exist. It then explores two different methods that practitioners in particular are increasingly using to capture and process such data: data mining and social network analysis. The chapter then turns to discussing the unique characteristics of online ethnography, in particular the specific consumer and marketing research guidelines and procedures developed under the term 'netnography', specifying what it means to observe and to participate in online contexts compared with offline contexts and providing guidance into the conduct of online observation, participation, and interviews.

Chapter 6 concludes the section on data collection by reviewing some aids that can usefully supplement the collection of interview, observational and/or archival data. These aids include audio recording, still photography, audio-video recording, the elicitation of participant-produced data, and other low and high tech data collection aids.

The next section of this volume turns attention toward analysing qualitative data. Chapter 7 outlines approaches to analysing data and building theory for scholarly research. It identifies coding as a central activity in data analysis, and discusses how to begin the 'open coding' process. It also outlines and gives detailed examples of how research questions, the prior literature relevant to the focal phenomenon, and the qualitative research tradition in which you are working can shape the codes that are the backbone of your analysis. It then details approaches to interpretation and theory building that include looking for variation in your data, looking for relationships between categories of codes, and drawing on pre-existing theoretical perspectives.

Chapter 8 explores how to analyse and interpret qualitative data for purposes of managerial decision-making. It emphasises that analysis undertaken for managerial applications must be focused on addressing or informing the relevant marketing decision, and identifies some of the major types of such decisions. It outlines a stepwise process for managerially focused data analysis, and provides 12 focusing tactics that can help enhance the quality of the managerial insight that is generated. It concludes with some suggestions for creating managerially useful interpretations.

Chapter 9 addresses the opportunities and challenges of presenting, disseminating and sharing qualitative research. It shows how different goals ranging from moving the audience emotionally and behaviourally to creating understanding, should shape the nature of the presentation of qualitative results. It considers how prior research and theory should affect research, especially that which is intended for academic publication. It also addresses a fundamental issue affecting the publishability of the research: how to be interesting and how to judge the interestingness of others' research. The chapter addresses questions of what should be presented in research reports and several different options for how your research might be laid out. Finally it goes through the process of submitting research for potential publication and how to handle reviews and prepare revisions. As with the rest of the book, exercises offer help in practising these aspects of the qualitative research process.

Chapter 10 provides some concluding thoughts, warnings, encouragement, and suggestions. These are both overall insights not emphasised in the preceding chapters and a reminder of a few points that we think deserve additional emphasis. It offers some further reflections on the importance and impact of qualitative consumer and market research. And it urges an adaptive outlook as evolving ingenuity and technology open new types of qualitative research in the future.

It is not necessary to read the chapters in order. Some (especially 2 and 7) are more geared to academic research and others (especially parts of 5 and all of 8) are more geared to managerial research. This balance as well as discussions of

how different research traditions and targeted publication or presentation opportunities should affect your research is unique in qualitative research treatments. The same is true of our emphasis on new technologies and contexts for research including netnography, videography, data mining, surveillance cameras, social media, and metaphor elicitation. Although these developments are new as we write this, qualitative consumer and market research is a rapidly developing set of methods and approaches and there are certain to be new techniques and new consumption contexts emerging by the time you read this. So we invite you to keep an open mind as well as open eyes for new possibilities. At the same time, the basics of qualitative research discussed here should remain sound, regardless of the new tools and opportunities that emerge. The book is linked to a website with further exercises and links to new developments in qualitative consumer and market research.



# 2

## Getting started: how to begin a qualitative research project

You may find that your initial idea for a research project will come from something you have observed, read about, or become curious about. Perhaps it is a phenomenon like using online deals from Groupon or consumer reactions to a technological development like nano technology, 3D television, or household robots. Ideas can also come from theory, popular culture, stories, or any other source of stimulation that initially pricks your interest. From there you need to find a focus, formulate a research question, and think about approaches to data collection. You might do some preliminary reading, observing, and interviewing or you might begin with a formal research proposal. Your research project may very well not unfold in a linear fashion and you may alternate between reading, observing, thinking, discussing, and writing. This chapter deals with the choices you will need to make when you begin a research project in which you gather and analyse primarily qualitative data. We emphasise that initial choices shape the direction of your project as a whole. In this chapter we will largely assume that your research is being conducted with a view to publishing in scholarly journals that require a theoretical contribution and may or may not place emphasis on managerial implications. Chapter 8 examines what will differ if you are pursuing a managerial project and have no desire to publish in academic journals.

Although we may not consciously think about it, whenever we undertake qualitative research projects we must make a set of choices. The sequence in which these choices are made varies, and initial choices are often revisited and revised. But in general, the choices that qualitative researchers make at earlier stages of a particular project include: