CHAPTER 8

QUALITATIVE INQUIRY IN MARKETING AND CONSUMER RESEARCH

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Let's begin this methodology chapter on an ontological note and distinguish, as Shweder does, between the nature of the objects (and the subject matter) we as researchers explore.[1] Quantitative researchers seek to reduce, if not remove entirely, the presence of the "merely subjective," so that illusion will not impede the measurement of the "really real." These researchers pursue *quanta,* that is, things as they "really are," phenomena that exist independently of our attention.

Qualitative researchers chafe at the restrictive notion of the "merely objective," and use the self as an instrument of interpretive understanding to discern the meanings arising in interpersonal interaction. These researchers pursue *qualia,* that is, the irreducibly local phenomena as experienced (sometimes uniquely) by individuals, that enlarge our conception of the "really real." *Qualia* are distinctive, situated objects which are underspecified or undetermined by *quanta.*[2] Qualitative researchers agree with Vladimir Nabokov, who jibed that " 'reality' is one of the few words in the English language that should never be used without quotation marks."

Qualitative marketing and consumer researchers quest for qualia in the everyday, lived experience of consumers, managers, public policy makers, activists, and countless other stakeholders—and, yes, via systematic introspection, including themselves—who contribute to the maintenance and change of marketplace behavior. By attempting to understand from the actor's perspective, and by striving to represent that understanding

authentically, these researchers complement the work of their quantitative counterparts.

This complementarity cannot be overemphasized. Just as the notion of "interpretive" research is a spurious, or, at least, a misleading one—both qualitative and quantitative approaches demand interpretation[3]—so also must it be noted that problem-driven multimethod inquiry is gaining in popularity.[4] Thus, practitioners of ethnographic, contextual, or naturalistic inquiry, while employing a standard battery of qualitative techniques, may also incorporate quantitative measures into their regime. Perhaps the diagnostic feature of these types of inquiry is their quest for *data* as opposed to the *capta* yielded by their quantitative counterparts.[5] That is, qualitative researchers elicit information in context, as a gift, rather less invasively than excising it for examination out of context, as a fact. The theory-ladenness of facts[6] is a qualitative preoccupation. Unfortunately, hard/soft, natural/social, qualitative/quantitative oppositions are pre-eminent symptoms of our cultural era; methodological hegemony has impoverished our understanding of the singularity of the particular.[7]

This chapter is not intended as a disciplinary history,[8] a methodological tutorial,[9] a managerial manifesto[10] or philosophy of science debate.[11] Rather we strive to frame some of the salient issues in the field, and explore some of the managerial implications of this particular approach to research.

ORIENTATION

In a recent study of the worldwide marketing research industry,[12] investigators discovered that ad hoc qualitative research comprises the largest growth segment of inquiries into consumer behavior. The proliferation of qualitative tools in the manager's toolkit is apparently accelerating.[13] As functional parity is achieved among products and services across more and more industries, and marketers are compelled to devote greater attention to understanding and enhancing the experiential dimension of their offerings,[14] we can expect qualitative research to undergo a renaissance. Zaltman's recent admonition to "rethink" market research by "putting people back in" to our design may herald just such a rebirth.[15]

Innovative qualitative research is diffusing widely across companies and categories. Published accounts of this diffusion are suggestive, even if unpublished proprietary reports remain the norm.[16] Firms in the high-tech area such as Hewlett Packard, Intuit, Microsoft,[17] Xerox,[18] AT&T Labs,[19] and Intel[20] are avid proponents. Consumer package goods companies such as General Mills[21] and Kimberly Clark[22] are similarly sold. In the automotive

field, Harley Davidson,[23] Toyota, and Nissan[24] employ the latest qualitative methods. White goods manufacturers such as Whirlpool[25] and clothiers such as Patagonia[26] have benefitted from current developments in qualitative research. Enterprises as wide-ranging as servicescape redesign—Borders,[27] Urban Outfitters,[28] and Hallmark[29] being notable beneficiaries—and segmentation sounding—qualitative interest in teenagers among such firms as Coca Cola, Levi Strauss, and Microsoft[30] being especially "hot"—fall within the purview of this trend. Media companies such as Turner Broadcasting Systems are carrying qualitative research methods forward into cyberspace.[31] Customer visits,[32] espoused by firms such as IBM, Raychem, Polaroid, Cigna, Metropolitan Life, and DuPont, foretell the spread of ethnography to business-to-business markets. Motorola has created a board of anthropologists to advise senior management on a host of issues. Specialized research providers, whether small or medium size firms or independent consultants, are flourishing. Chicago, for example, is home to such firms as E-lab, the Doblin Group, BRS Associates, and Teenage Research Unlimited, as well as to agencies such as DDB Needham, Young and Rubicam, Ogilvy & Mather, Leo Burnett, J. Walter Thompson, Kramer Crasselt, and others, who provide innovative qualitative research to clients. Market-oriented ethnography[33] is a going concern.

While these qualitative methods have not diffused as rapidly through the academic disciplines of marketing and consumer research—arguably academics do not depreciate intellectual capital as rapidly as managers alive to practical applications of theories-in-use—they have established themselves as a viable niche in business schools, professional societies, and scholarly journals, usually under the (maddeningly misleading) rubric of "interpretive" or "postmodern" research. Here, researchers from a host of disciplines from anthropology to literary criticism have conspired to produce a view of marketing and consumption that is distinctly different from conventional wisdom. Academic niches are flourishing within U.S. business schools such as Kellogg, Harvard, Sloan, Smeal, Eccles, Eller, Wisconsin, Nebraska, and U.C.-Irvine, as well as outside them, in allied schools such as the Advertising department of the University of Illinois. Professional societies such as the Association for Consumer Research and the American Marketing Association are devoting more conference space to qualitative concerns. Scholarly journals, such as the *Journal of Consumer Research,* the *Journal of Marketing,* the *Journal of Marketing Research,* the *Journal of Advertising,* the *Journal of Business Research,* the *International Journal of Research in Marketing,* and *Culture Markets and Consumption* are fielding more articles in this burgeoning area. Perhaps more encouraging is the

increasing incidence of consumption—and marketing-related articles being published in social science journals beyond the conventional business school purview.

DISTINCTIVE FEATURES OF RECENT QUALITATIVE RESEARCH

Given the proliferation of techniques and approaches in recent years, as well as adaptations to traditional methods, any attempt to summarize, synthesize, and integrate the facets of qualitative research will appear absurdly reductionist, if not misleading, in light of such space limitations as this chapter imposes. Nonetheless, an overview should be instructive, and orient the reader to some key features of current inquiry. We encourage the reader to consult authoritative sources for expanded treatments.[34]

Naturalistic observation is the hallmark of much recent effort. Immersion in a field setting, and prolonged engagement with informants (whether consumers, marketers, or other stakeholders) are common practices. Researchers often employ an *emergent design,* in an effort to capture as comprehensively as possible the minimal parameters of a phenomenon. Inquiry has an alternately expanding and contracting focus. Analysis is hermeneutic and iterative, and proceeds via a constant comparative method. Thus, data collection and analysis are conducted in tandem. A dialectical relationship between library research and field research characterizes the inquiry. Researchers sample until saturation and redundancy are achieved, at which time they either conclude their inquiry, or adopt different techniques that may permit the transcending of the limits of researchers' habitual tools of choice.

Progressive contextualization is another important research strategy. Researchers grapple with the nesting and embedding of understanding. Because meaning is always situated, a heightened attention to the context in which a phenomenon unfolds is amply repaid. Contextual inquiry is a way to elicit some of the unarticulated, tacit knowledge, emotion, motivation, and understanding that people possess. Thus, researchers will often strive to understand how behavior will ramify beyond an individual to a household, a community, and, ultimately, to a society itself. Embeddedness is a critical concern.

In keeping with their desire to probe a range of behavior patterns, researchers attempt to make *maximized comparisons.* They use variation as a perspective for plumbing similarities and differences among phenomena. Thus, researchers roam across cultures, times, or situations to provoke variance. While the representativeness of a phenomenon is clearly of interest,

researchers are equally—and often, perhaps even more—concerned with outliers. Outliers are embraced (rather than rejected) for the distinctive insight their marginality can contribute. A marginal perspective is often incisively illuminating.

Qualitative inquirers quest for *sensitized concepts.* They are interested in the lived experience of their informants and in representing that experience authentically. Capturing the worldview and ethos of informants, as distinct from an analytic framework imposed by the researcher, is at the heart of the inquiry. Often such investigation is idiographic, the goal being for the researcher to develop systematic intuitions about informants' lifeworlds. Thus, informants are increasingly regarded as collaborators and consultants in the research enterprise, which itself becomes a co-created, jointly negotiated undertaking. The ultimate result of close attention to sensitized concepts is a so-called "thick description"[35] of the phenomenon under investigation.

Perhaps the most controversial hallmark of qualitative research is the notion of *intraceptive intuition*.[36] Simply stated, the researcher is the preeminent instrument of research. Believing that it is both impossible and undesirable to eliminate the impact of the inquirer upon the phenomenon, researchers attempt to increase their own acuity as an instrument through a variety of strategies (multimethod training, broad reading, wide experiential exposure, interpersonal skill development, psychoanalysis, introspection, personal disclosure in published research accounts, etc.) that both exalts and harnesses their idiosyncrasies. They strive to develop both wide cognitive peripheral vision[37] and broadly resonant emotional depth as indispensable aids to interpretation.

A final distinctive feature of current qualitative research is its emphasis on *grounded theory*.[38] Simply stated, theory is expected to emerge from the data. Because a researcher cannot approach a project with no a priori theories or hypotheses, and as a consequence of the rejection of a so-called objective or disinterested "fact," an inquirer strives to specify and disclose existing personal biases, but hold them in abeyance (in effect, "bracket" them) as the research regime unfolds. The posture adopted toward theory development is essentially an agnostic, eclectic one, which allows for the discovery and construction of broad, truly rival hypotheses.

The thrust of much recent qualitative work in marketing and consumer research has been critical, culturological, and communicative.[39] Researchers have explored extraeconomic and normative dimensions of behavior. They have worked steadily to unpack, dismantle, and banish the notion of "externality" from the literature. Finally, they have accelerated investigation

into the nature, transmutation, and translatability of "meaning" as these issues bear upon marketing and consumption.

SPECIFIC TECHNIQUES

Because of space constraints, we have been selective in our discussion of particular qualitative research techniques without being entirely reductionist. In this section, we describe these techniques which currently enjoy cutting-edge status—participant observation, interview, and projective tasking—among academics and practitioners. We also describe the practice of "close reading" or "hermeneutic tacking" that characterizes each of these techniques.[40] Finally, we consider the extension and application of techniques developed for use "in real life" to phenomena evolving in cyberspace.

Participant Observation

Properly speaking, participant observation is a cluster of techniques employed to discover, interpret, and represent phenomena comprehensively and holistically. Thorough analysis often depends on a negotiated understanding of informant and researcher's perspectives. Participant observation born of prolonged field immersion is the hallmark of ethnography. Alternately obtrusive and unobtrusive, the ethnographer apprehends, with as many sensory modalities and through as many experiential channels as required, the lifeworlds of the informant. The ethnographer is, in effect, acculturated or resocialized by informants, once a rapport is established, to apprehend the strange as familiar, or, more commonly in market research settings, the familiar as strange. Intimacy with stakeholders, achieved through trust evolved over time in context of the round of life, opens a window for ethnographers on the lifeworlds of informants.

Participant observation circumvents many of the problems associated with faulty recall, limited ability to articulate (whether tacit knowledge or the unthought known), and social desirability in self-disclosure. It is invaluable in mapping the ecology of consumer behavior and in providing inferential stimuli for probing its social structure and ideology.[41] It is especially useful in harnessing the marketer's offerings—products, services, advertisements, retail outlets, and so on—into projective stimuli to be used in conjunction with other techniques to unpack the production of consumption. Confronting informants with real time aspects of their lifeworlds in context is a powerful eliciting device.

Increasingly, photography, videography, and audiotaping are used as aids to participant observation. These tools are employed actively by the

researcher to capture emergent behavior and create a visual inventory. Just as often, the tools are deployed passively to record material in the researcher's absence. Informants are deputized to photograph, audiotape, and videotape their own lifeworlds, with equipment provided by the researcher (or to behave "as usual" in front of recording equipment fixed and mounted in their personal environments). Such informant-produced insight is a productive complement to the researcher's inquiry.[42] Photos, videos, and audiotape diaries can then be used as projective vehicles to elicit additional informant commentary, in a practice called *autodriving*.[43]

Interviews

Interviews comprise a broad continuum of focused inquiry. At one end, interviews may be informal, unstructured, nondirective, and conversational. On the other end, they may be formal, highly structured, entirely directive, and administered identically across all informants. Interviews may be conducted with individuals or with groups. Interviews may be used to elicit sheer or mere information, in an actuarial or inventory sense. They are also used to enter the phenomenological-existential world of informants. Interviews depend for their success on the forging of bonds of trust between actors, the eliciting skills of the interviewer, and both the insightfulness and desire for disclosure of the informant.

An especially crucial practice for construing the interview is the temporary suspension of the researcher's voice of judgment. Imagining the question to be something more than a simple interrogatory is the key to this suspension. A question is an invitation to creativity, a point of departure; it is the search for a playmate, a form of seductive foreplay.[44] Ultimately, a question is a jointly negotiated quest for understanding, a partnership in an adventure. Learning to listen deeply is essential for the interviewer, since being heard is one of the most profound, humane gifts an individual will ever receive; listening deeply is the symbolic equivalent of holding the informant.[45]

It is our belief that the group interview is the most overused and misused arrow in the qualitative quiver. Focus groups often provide the illusion of human contact and the occasion of pyrotechnics that efficiently satisfy the prematurely narrowed imagination of clients and researchers behind the one-way glass. To exploit fully the potential of the group interview,[46] it may be necessary to conduct archival analysis, participant observation, and depth interviewing before convening a focus group. Briefing participants in advance of the session, or requesting "homework" of them prior to convening the group may yield dividends. Conducting a

variety of tasks during the group is often productive.[47] Altering conventional spatial and temporal boundaries of the session may also be indicated; groups can be conducted *in situ,* over hours and even days. The so-called moderator is simultaneously an over-used and underutilized resource. The moderator must facilitate interaction, alternately guide and probe the discussion, and analytically attend, in real time, to the verbal and nonverbal cues that enable systematic unpacking of the clients' interests as embodied in the group. Further, the moderator develops a theory in-use-on-the-fly to direct each subsequent group in the project. Finally, the moderator must deliver an interpretive analysis replete with managerial implications. Such demands require that we empower moderators to be more active (yet not more intrusive) than convention dictates, and that we partner them with confederates (on either side of the glass) to aid in the iterative process of data collection and analysis. This is easily enough accomplished in academic research, and could be routinized in proprietary research by deputizing and training client personnel.

Projective Tasking

It is instructive to consider the tension animating the multiphrenic self in postmodern society[48] from an evolutionary perspective. As a species, we have achieved distinction in no small measure thanks to the tension that modulates our principal personae: *homo faber* versus *homo narrans.* In our former aspect, we are tool-making creatures, and in our latter aspect, storytellers. While these two aspects co-exist and interact synergistically, they serve distinctive adaptive ends. Traditionally, marketers have treated primarily (indeed, have been) makers; only recently have they treated (indeed, become) storytellers. The webs of significance in which stakeholders are suspended[49] are becoming a focal interest.[50] How best to tap such meaning making?

Projective tasks engage our storytelling impulse. Such tasks permit the asking of questions in an indirect fashion and encourage the least restraint in their answering. Projectives invite informants to respond in ways that are distinctively personal and ostensibly personally meaningful. Projectives empower informants to respond in more creative, insightful, and revealing ways than might otherwise be possible. Inquiry is cast in dramatic form, and the drama essentially poses the question. Indirection is used in the service of illumination. Projectives plumb unconscious material, socially objectionable motivations, and informant fantasy; they elicit responses to issues informants may find too trivial or too sensitive to address directly.[51]

Although evolved in a clinical setting for use as a triangulating perspective to assist diagnoses in context, projectives have migrated into marketing and consumer research predominantly as stand-alone measures, modified to suit a nonclinical population. Recently, some researchers have cautioned against the a-contextual use of projectives.[52] Thematic apperception tasks have been most widely used. Sentence completion, figure drawing, word association, structured fantasizing, and collage creation have also proven popular. Often, these individual techniques are combined in a single study to enhance depth and richness of response, as well as to triangulate among techniques. For example, the Zaltman Metaphor Elicitation Technique[53] combines informant-selected images, depth interview, laddering, photo and art therapy techniques, sensory inventory, structured fantasizing and collage creation as eliciting frames.

Close Reading

A common analytic posture across the qualitative methods, tied intimately to intraceptive intuition, is the practice of close reading[54] or hermeneutic tacking.[55] Whether the analyst uses ethnography,[56] existential phenomenological interview,[57] projective tasking,[58] literary criticism[59] or introspection,[60] relentless attention to detail and painstaking relation of part to whole are key features of the enterprise. Working with a textual metaphor in the case of behavior, or with a literal text in the case of interview verbatims, the analyst attends in minute detail to the systematic unpacking of meanings present in the text. Recognizing that meaning is often polysemic, the analyst seeks to reveal—in dialogue with both "text" and "author"—as exhaustively as possible the levels and nuances of meaning embedded in the text. Some or much of the meaning thus wrested from the text may be opaque or transparent to the informant at the time of text production. For example, recently we have seen a shift from a close reading of advertising text[61] to text in reception;[62] we can imagine a longer term inquiry that moves from production through reception to re-production.

Ideally, a close reading produces the richest possible understanding of a "text" because all relevant information—internal and external—to the "text" is carefully considered. Relevance is broadly construed. That is, initial attention is riveted on the content, rhetoric and structure of the "text," and then this analysis ramifies to related "texts," which in turn both extends and amplifies the original analysis. The researcher tacks between and within internal and external information sources, in hermeneutic fashion, in search of enlightenment.

INTERPRETIVE SUMMARY

It is apparent how complementary and overlapping these techniques can be in their nature and application. Participant observation helps the analyst limn the informant's lifeworld, and permits the acquiring of systematic intuitions about worldview and ethos. Participation helps the researcher embody this knowledge and experience. Interviews take the researcher deeper into the phenomenal realm of the informant, allowing for a systematic exploration of the informant's physical and metaphysical experience. Projective tasking helps the analyst transcend his or her observational and elicitation skills, and affords access to unarticulated realms of informant experience. Each technique amplifies, reinforces, extends and challenges the others.

Given the evocative power of things (i.e., products, services, brands, servicescapes, trust relationships, advertising, and anything else in the marketing environment) and our human penchant for meaning mongering, qualitative methods used in consort can be powerfully illuminating. In this situation, consumer ethnographies[63] or customer visits[64] are most productive. Imagine a project conducted over time in sites significant to the customer, where all the artifacts in a given situation are meaningful to the customer. These artifacts (e.g., a brand, a relationship) are fundamental eliciting devices, set as they are in the consumption context. The artifact can be used as a projective task and contextual cues in evidence can be marshaled to elaborate, clarify, contest, and revise the customer's interpretations systematically via interview. Imagine further the analyst debriefing the customer systematically, sharing analytic interpretations of observations, interviews, and projectives, so that the customer might react constructively and critically and thereby improve the "final" interpretation. Such creative triangulation in contextual inquiry and collaboration in analysis is becoming more common.

EXPORTING QUALITATIVE TECHNIQUES TO CYBERSPACE

If part of our goal in using qualitative research is to enlarge our concept of the "really real," what better place to stretch than in the virtual reality of cyberspace? As a society we are consuming cyberspace as diversionary delight and wellspring of communitas and illumination. We are employing the expanded scope and resources of infotech to open and explore a vast range of market relations[65] and consumption servicescapes[66] in the marketspace[67] of

cyberspace. Resolved by a one-hour sale on AOL that drove over half a million customers through the digital door of an online retailer—a feat unimaginable in the "real" world—is the fact that informational networks are changing the shape of marketing and consumption forever.[68] No doubt marketing and consumer researchers, including qualitative inquirers, are impelled to follow in their wake. But, upon venturing forth into the contextual frontier of cyberspace, what ecology do we face?

Early research into the medium of *computer-mediated communication* (or CMC) found that its limitations forced an unnatural style of communication, reduced relational cues and impoverished the interpersonal environment.[69] Its anonymity and apparent privacy seemed to erode social structures by equalizing status and encouraging a less inhibited form of communication.[70] Early scientific voyages, then, found cyberspace to be like outer space: cold and inhospitable.[71] Yet field researchers have found it to be a much more generative medium when filtered into the phenomenological stream of lived experience. Cyberspace seen not as computer-mediated communication but as community is an organic entity, diverse, dynamic, and multitendrilled, a carnival of personally-enriching social worlds.[72] Ever-adaptable, the human animal has developed the new communicative tools and abilities to turn the cold online environment into a hearth of sociality.[73] New software and hardware tools and sophisticated avatars advance digitally upon perfectly real and perfectly fantastic simulations of face-to-face. In the meantime, an "electronic paralanguage" captures a range of affection, affiliation, social relational and metacommunicative cues.[74]

In cyberspace, human interaction must cope with (to borrow and fracture Milan Kundera's beautiful turn of phrase) an "unbearable textuality of being." The relationships change as a result of this intrusive and liberating filter on embodiment.[75] Communication that is *technologically mediated* is also radically textualized.[76] Whether our words are converted into ASCII or carried in (still crude) digital sounds and images, the intrusiveness of cyberspace communication channels is instantly obvious. While the medium is challenging us to overcome it and communicate in ways that feel more natural,[77] it is also opening opportunities.[78] Implied privacy and textuality confers experiences of *anonymous search and expression* that can be liberating in the extreme.[79] The leveling of a variety of social playing fields confers *social accessibility* that results in much wider participation than in almost any other social channel.[80] On the Internet no one knows you're a dog—or a kid, or white, or disabled, or living in Timbuktu. Being digital also means that social *information is inscribed and archived,* automatically[81] *and widely accessible.* With search costs vastly reduced, problem sets across the board

change from the collection of information to management of the hypertext cascade ensuing from even the most cursory search.

Cyberspace is a liminal locale, providing a placeless space and what anthropologist Victor Turner called a "time out of time." For the human species, the move into the altered time and space horizon of cyberspace presents a radical temporal and environmental discontinuity.[82] According to some, this change is an evolutionary one in which the thinking animals that make tools increasingly blur the distinction between tool and thinking animal. The result is a *cyborg ecology*[83] in which abstract being and embodied being, mind and AI, organism and machine comfortably coexist.[84] To help understand this ecology, qualitative inquiry can evolve along with it.

Netnography

From the raw material of bits and icons, people construct meaningful social communities. But whether called "virtual communities,"[85] "brand communities,"[86] "communities of interest"[87] or "Internet cultures,"[88] these groups use common marketplace interests as the social cement to form their foundation.[89] While, to a marketer's eye, some of the symbolic cues they use may look familiar, the challenge in cyberspace's twisted social arenas is often one of disentangling the message from the medium, and making familiar the strange and tortured dances of social cyberia. Encompassing online community, *netnography* has been developed as a naturalistic technique for capturing conduct in cyberspace.[90]

Netnography is an amalgam of qualitative techniques, adapted for cyberspatial environs.[91] Like participant-observation, it can be simultaneously obtrusive and unobtrusive. The act of "lurking" in online fields[92] offers an unobtrusiveness that blurs telepresence[93] to near invisibility. Yet netnography holds online participation to be a beneficial investigative movement.[94] Like its offline counterpart, it seeks *immersion,* a profound experiencing of digital sociality. Access to a wealth of data may make it easy to confuse breadth for depth, and mistake quantity for quality. But being acculturated into bravely evolving new social spheres requires *prolonged engagement.* This infers naturalizing the techno-environment and rules of engagement of the overall realm of cyberculture.[95] The body language of emoticons, intentional misspellings, lexical surrogates for vocal segregates, spatial arrays, grammatical markers, absence of corrections and capitalization, as well as visual ASCII art[96] will be essential gadgets in the netnographic inquirer's kitbag. Then, there are more specific codes to learn that pertain to your communities of choice, their personnel, their history and rules,[97] their relations to the offline servicescapes[98] of markets and consumption.[99]

In furtherance of this goal, trust is an essential catalyst. Honesty, a legitimate purpose, and a genuine firsthand knowledge of the community offer entrée modes of solid basis. Specifying the nature of quid pro quos and a common interest can fuel ongoing participation and ever-increasing access.[100] All the while, the ethics of the inquiry are double-edged and very real. Investigators must vigilantly attend to ever-evolving online privacy concerns.[101]

Through this endeavour, the adept cybernaut will be chronicling the journey through field or journal notes. The bulk of these notes will be self-transcribing—digital captures of the social flow. Introspection and the testing and elaboration of theory will be greatly assisted by additional fieldnotes which are reflective, analytical and which point to interesting directions for future investigation. Even as the technology's mediation textualizes and occludes researcher insights, it similarly places limits on what informants (consumers, marketers, other stakeholders) are able to articulate. Tacit knowledge is thus a difficult but essential prize to be sought in cyberspace. Gaining it requires discriminating and empathic elicitation, and can be greatly assisted by incorporation of two other techniques: the cyber-interview, and digital projectives.

Cyber-Interview

In a sense, the interview already permeates cyberspace. An almost unbounded interactional space, newsgroups, chat rooms and e-mail messages are filled with the interpersonal dialog of questions and answers. Informants expound and explore, sharing personal histories, anecdotes, urban myths and legends. Decoding and finding the common and the particular in the stories these people tell[102] is one important source of netnographic insight. Others are more proactive.

As prelude and adjunct to the cyber-interview, *e-profiling*[103] leverages cyberspace's unprecedented access to social information to bolster inquiry effectiveness. E-profiling entails gaining publicly-available information on an informant's public Internet social activities. Reading samples of an informant's postings and visiting the newsgroups to which they post regularly—or their personal Web-pages or profiles—can confer precious perceptions of their social situation, interpretive communities,[104] life themes and life goals,[105] and overall experiential multidimensionality.

Cyber-interviews offer a means of altering the conventional spatial and temporal boundaries of focus group sessions. In cutting-edge university and corporate labs around the globe, software and groupware is being tested for deployment in electronic focus groups. The focus group conducted through

teleconferencing software has been heralded as the major trend in focus group development.[106] As it by now may be obvious, cyber-interviews, like their offline counterparts, can be group-based or individual, formal or informal, structured or unstructured. The medium's technological characteristics are, however, directive. Particular interview styles fit particular cyber-forums better than others. So the synchronous, real time realm of chat rooms—with its conversational tone and its unfettered nature—is more suited to the informal interview that hopes for insight through heat-of-the-moment disclosure.[107] Posted newsgroup or e-mail questions offer a foundation of carefully considered answers often more appropriate to the aims of a formal interview.[108] "Persistent conversation" in any cyberspace forum can, nevertheless, lead to revelationary personal and emotional discovery.[109] Coupled with researcher genuineness, trust-building and heart-felt confession, these interviews—which can often seem a synthesis of penpal-like enthusiasm and ongoing tutelage[110]—can provide much disclosure and enlightenment. Coupling cyber-interviews with techniques that deploy digital projectives can enable access to more of the unknown and tacit levels of cultural knowledge.

Digital Projectives

Postmodernist Jean Baudrillard has coined the term *hyperreality*[111] to refer to the contemporary blending of simulation and reality, the place where the artifice and the authentic merge, and where the synthetic illusion is often deemed preferable to the concrete original. Although Baudrillard's is an often pessimistic view,[112] the information economy seems almost custom-built to blur boundaries[113] offering nearly limitless alternatives for losing oneself in simulation. The stream of prospective multimedia stimuli that online informants engage with encompasses ASCII texts and other representational codes, visual imagery such as logos and photos, sound bits and video bytes, avatars and live teleconferencing images. As with Baudriallard's creeping hyperreality, almost every "thing" in the physical world is coming to have, in cyberspace, at least one and usually a multitude of virtual doppelgangers.

With multifarious choices arraying everything from Scientology and UFO conspiracies to V-chip technical standards and the latest lampshade fashions, in some ways, cyberspace itself might be construed as a gigantic projective task. In anonymous and accessible telespace, it affords a forum for the articulation of the previously inexpressible. Turkle says that the Internet has become "a significant social laboratory" in which people experiment

with "the constructions and reconstructions of self" which characterize contemporary life.[114] Postmodern identity has been conceived as consisting of endless acts of refashioning and re-creating our selves.[115] In the play of cyberspace, a virtual playground is constructed. Netnographers in this space are lurkers on the side and fellow playmates. Qualitative inquiry delves into the revelatory possibilities of this serious site of play and identity creation, observing the multiplicity, heterogeneity, and fragmentation of the multiphrenic consumer in action.[116]

Cyberspace is said to be based on an "attention economy," in which the scarcest resource is not money or any other resource, but human attention.[117] Capturing and holding the attention of cyberspace informants is thus a central challenge. Formally instituting the projective properties of cyberspace, a *Web-based intrication strategy*[118] can help capture the attention and imagination of informants. A research homepage that provides detailed visual and textual material on topics targeted to the particular interests of cultural informants can be an invaluable means of intrication. Open-ended questions, word completion tasks, even requests for scanned artworks and doodles can also appear. This strategy can also make use of computer-translations of existing projective tasks, for instance, autodriving.[119] Zaltman's aforementioned Metaphor Elicitation Technique has already been digitized. Consumers use magazine photos to synthesize paper-based collages expressing brand or product hypostasis. The collage is digitally scanned, polished by a graphic designer and drafted into service as a powerful projective probe. Sensibly customized, the technique easily transports to cyberspace. In summary, the artifacts used as projectives by the qualitative inquirer in cyberspace are abstract renditions, representations once removed. But through the online construction of sociocultural reality,[120] these digital images, Web-page, or content elements of a Web-page undergo a psychological and ontological transmutation. They achieve a status considered—within limits—"real," thereby becoming useful tools of cultural exploration.

Nuance and Compromise

In the context of cyberspace, contextual inquiry morphs to accommodate its technological mediation, radical textualization, anonymous search and expression, and accessible information and social arenas. Tradeoffs are critical to netnographic inquiry. Cyberspace decontextualizes by removing physical facets of identity we naturalize as useful.[121] Self-selection and representativeness are sticky and difficult issues. A textualized way of knowing reduces the number of observable cues, and the opportunities to discern

tacit knowledge. In exchange, it recontextualizes identity by infusing it with fantasy, play and interactivity.[122] Paradoxically, a realm of deception can increase disclosure. A home-based excursion into virtual reality can offer not only a more dynamic and accessible context than a laboratory but a far less artificial one. In keeping with our theme of complementarity between methods of investigation, netnography—with its cyber-interviews and digital projectives—must be understood as adding to, not replacing, offline research (of both the qualitative and quantitative persuasions). In addition, information technology transforms qualitative inquiry in a myriad of other ways. It changes the nature of in-person inquiry and recording, data analysis, triangulation, member checks, and research representation.[123] It can provide fresh perspectives for triangulating upon cultural actors as they engage in new forms of expression and experience. These methods may thus assist our understanding, not only of the virtual, but of the human reality.

CRISIS OF REPRESENTATION

As qualitative research evolves into the next historical epoch—the so-called sixth moment[124]—it is animated by a number of tensions, some of which, like technology, we have explored in detail in this chapter. Issues of reflexivity and legitimization, that is, the situatedness of knowledge claims and authority of interpretation, though broached here, must be deferred for extended discussion to subsequent papers. Polyvocality and representation, the emergence of contrasting stakeholder voices and agendas, and the challenge to depict authentically the lived experience of others,[125] require a ritual bow in our present treatment, however, since they form collectively one of the most interesting challenges to the marketing imagination.

Having spent so much time trying to achieve intimate understanding of marketplace behavior through communion with consumers and managers via methodological means, qualitative researchers have now turned their attention to the vehicles used to represent their interpretive efforts. Recall our earlier discussion of the foundational importance of storytelling, then note its neglect in our disciplines' research stories. Not only are we slow to plumb the possibilities of text, let alone hypertext, or of dialogic let alone polylogic discourse, but also we are just beginning to imagine the shape a nonlinear, nondiscursive, nonliterate representation might assume.

Consumer researchers have begun asserting[126] that conventional journal articles are insufficient vessels for conveying a holistic understanding of the lived experience of stakeholders. We have seen the emergence of genres such as "messy texts," autoethnography, poetry, performance texts, ethnographic fictions and narratives of the self[127] in consumer research. Photography,

videography and painting have also emerged as research vehicles. Exemplars of such experimental representation are proliferating.[128]

Managers as well as academics have responded to the crisis of representation by embracing new expressive strategies. With a shift toward interpretive management, companies such as Levi Strauss, Intel, Motorola, Nokia, and Chiron have sought to enfranchise polyvocality in everyday operations, and promote multistranded discussions of the future among stakeholders and constituents.[129] 3M invokes storytelling in the service of business planning, exploiting narrative logic to plumb the places that bullet points can't reach.[130] Arguably, the increasing emplacement[131] of brand essence in vehicles such as retail theatre and Web sites is a creative response to the crisis of representation.

With its holistic, often visual qualities, qualitative research is, in many ways, cinematic in its gaze.[132] To represent findings, the interactive multimedia formats afforded by information technologies are not only ideal, but also alter the nature of representation itself. Hypertext and hypermedia (links to audio and visual information) change the relationship between researcher and reader in ways eerily attuned to the concerns of the crisis of representation.[133]

Described by some as a relatively unproblematic change in reporting opportunities,[134] this change is viewed by others as a radical departure in which the research writer "disappears, receding into the background."[135] From this perspective, final authority is conferred upon the text's new author, the point-and-click *bricoleurs* who, "in the electronic spaces of hypertext . . . construct the text out of the bits and pieces and chunks of material left for them by the writer" (ibid). Others emphasize the accessibility of the entire cyberspatial modality by envisioning hypertext netnographies linked to myriad Web-pages, Web-ring and chat rooms.[136] Hypertext netnographies are data rich, and provide opportunities for "open" textual construction,[137] real-time cultural observation, and unmediated contact with informants. They can transcend the uniformity and voyeurism of traditional ethnography's thick description, transcription and even inscription[138] to approach the stimulation of sociosimulation.[139]

CONCLUSIONS

As cultural life transforms, becoming more fragmented and diverse, so also do the methods of researching it. Marketing and consumer researchers are increasingly thinking about their task in terms that are naturalistic and holistic, and that deftly combine complementary methods. They blend (and apply) their art and science in ways that seek to reveal the sophisticated

configurations, the constellation of lifeways and interests that undergird markets and consumption. In some cases, these configurations can be observed simply by watching what people do with artifacts such as products, advertisements or brands. For others, watching someone surf the net, observing the way their lifeways intersect with cyberspaceways can provide provisional clues. Almost always, the complementarity of multimethod techniques provides more comprehensive perspectives. Extending our knowledge into the lifeworlds of human beings in interaction means following them, seeing with their eyes as well as our own.

Branching out into real spaces and cyberspaces is empowering. Viewing markets and consumption holistically means opening vistas that encourage interdisciplinary, multidisciplinary and even transdisciplinary thinking. Setting our sites on longer term inquiries will allow researcher to scope out new cultural processes in the production, reception and the reproduction of meanings.[140] Many companies are just beginning to use virtual communities for lead user analysis[141]—blurring the bounds between production and consumption as customers serve as fountainheads of corporate innovation. The new questions and problems these processes propose are far from simplistic. Indeed, the intersection of cultures, markets and cyberspace are bound to become the source of the most pressing ethical and moral issues of the next few decades. Perhaps some of these techniques and ideas might be helpful in the investigations that will inform these urgent and important debates.

As it unfolds in cyberspace and IRL, we believe the future of qualitative inquiry in marketing and consumer research hinges upon the posture adopted toward the practice of "deep hanging out." The social sciences are simultaneously relinquishing[142] and re-embracing[143] the tradition of prolonged local immersion that results in nuanced interpretation of field data. At this point in their intellectual evolution, our disciplines require the kind of deep hanging out that permits researchers to infuse our databases with soul. Deep hanging out—the kind of loitering with intent that positions the marketer to become the marine biologist (not simply the fisherman) to the consumer's fish[144]—is a necessary corrective to premature closure and the rush to generalization. We hope we have provided enough guidance in this chapter to provoke our readers to dwell for awhile among the deep hangers-out, in search of more intimate understanding of marketplace behavior.

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Kellogg on Marketing

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authentically, these researchers complement the work of their quantitative counterparts.

This complementarity cannot be overemphasized. Just as the notion of "interpretive" research is a spurious, or, at least, a misleading one—both qualitative and quantitative approaches demand interpretation[3]—so also must it be noted that problem-driven multimethod inquiry is gaining in popularity.[4] Thus, practitioners of ethnographic, contextual, or naturalistic inquiry, while employing a standard battery of qualitative techniques, may also incorporate quantitative measures into their regime. Perhaps the diagnostic feature of these types of inquiry is their quest for *data* as opposed to the *capta* yielded by their quantitative counterparts.[5] That is, qualitative researchers elicit information in context, as a gift, rather less invasively than excising it for examination out of context, as a fact. The theory-ladenness of facts[6] is a qualitative preoccupation. Unfortunately, hard/soft, natural/social, qualitative/quantitative oppositions are pre-eminent symptoms of our cultural era; methodological hegemony has impoverished our understanding of the singularity of the particular.[7]

This chapter is not intended as a disciplinary history,[8] a methodological tutorial,[9] a managerial manifesto[10] or philosophy of science debate.[11] Rather we strive to frame some of the salient issues in the field, and explore some of the managerial implications of this particular approach to research.

ORIENTATION

In a recent study of the worldwide marketing research industry,[12] investigators discovered that ad hoc qualitative research comprises the largest growth segment of inquiries into consumer behavior. The proliferation of qualitative tools in the manager's toolkit is apparently accelerating.[13] As functional parity is achieved among products and services across more and more industries, and marketers are compelled to devote greater attention to understanding and enhancing the experiential dimension of their offerings,[14] we can expect qualitative research to undergo a renaissance. Zaltman's recent admonition to "rethink" market research by "putting people back in" to our design may herald just such a rebirth.[15]

Innovative qualitative research is diffusing widely across companies and categories. Published accounts of this diffusion are suggestive, even if unpublished proprietary reports remain the norm.[16] Firms in the high-tech area such as Hewlett Packard, Intuit, Microsoft,[17] Xerox,[18] AT&T Labs,[19] and Intel[20] are avid proponents. Consumer package goods companies such as General Mills[21] and Kimberly Clark[22] are similarly sold. In the automotive

field, Harley Davidson,[23] Toyota, and Nissan[24] employ the latest qualitative methods. White goods manufacturers such as Whirlpool[25] and clothiers such as Patagonia[26] have benefitted from current developments in qualitative research. Enterprises as wide-ranging as servicescape redesign—Borders,[27] Urban Outfitters,[28] and Hallmark[29] being notable beneficiaries—and segmentation sounding—qualitative interest in teenagers among such firms as Coca Cola, Levi Strauss, and Microsoft[30] being especially "hot"—fall within the purview of this trend. Media companies such as Turner Broadcasting Systems are carrying qualitative research methods forward into cyberspace.[31] Customer visits,[32] espoused by firms such as IBM, Raychem, Polaroid, Cigna, Metropolitan Life, and DuPont, foretell the spread of ethnography to business-to-business markets. Motorola has created a board of anthropologists to advise senior management on a host of issues. Specialized research providers, whether small or medium size firms or independent consultants, are flourishing. Chicago, for example, is home to such firms as E-lab, the Doblin Group, BRS Associates, and Teenage Research Unlimited, as well as to agencies such as DDB Needham, Young and Rubicam, Ogilvy & Mather, Leo Burnett, J. Walter Thompson, Kramer Crasselt, and others, who provide innovative qualitative research to clients. Market-oriented ethnography[33] is a going concern.

While these qualitative methods have not diffused as rapidly through the academic disciplines of marketing and consumer research—arguably academics do not depreciate intellectual capital as rapidly as managers alive to practical applications of theories-in-use—they have established themselves as a viable niche in business schools, professional societies, and scholarly journals, usually under the (maddeningly misleading) rubric of "interpretive" or "postmodern" research. Here, researchers from a host of disciplines from anthropology to literary criticism have conspired to produce a view of marketing and consumption that is distinctly different from conventional wisdom. Academic niches are flourishing within U.S. business schools such as Kellogg, Harvard, Sloan, Smeal, Eccles, Eller, Wisconsin, Nebraska, and U.C.-Irvine, as well as outside them, in allied schools such as the Advertising department of the University of Illinois. Professional societies such as the Association for Consumer Research and the American Marketing Association are devoting more conference space to qualitative concerns. Scholarly journals, such as the *Journal of Consumer Research,* the *Journal of Marketing,* the *Journal of Marketing Research,* the *Journal of Advertising,* the *Journal of Business Research,* the *International Journal of Research in Marketing,* and *Culture Markets and Consumption* are fielding more articles in this burgeoning area. Perhaps more encouraging is the

increasing incidence of consumption—and marketing-related articles being published in social science journals beyond the conventional business school purview.

DISTINCTIVE FEATURES OF RECENT QUALITATIVE RESEARCH

Given the proliferation of techniques and approaches in recent years, as well as adaptations to traditional methods, any attempt to summarize, synthesize, and integrate the facets of qualitative research will appear absurdly reductionist, if not misleading, in light of such space limitations as this chapter imposes. Nonetheless, an overview should be instructive, and orient the reader to some key features of current inquiry. We encourage the reader to consult authoritative sources for expanded treatments.[34]

Naturalistic observation is the hallmark of much recent effort. Immersion in a field setting, and prolonged engagement with informants (whether consumers, marketers, or other stakeholders) are common practices. Researchers often employ an *emergent design*, in an effort to capture as comprehensively as possible the minimal parameters of a phenomenon. Inquiry has an alternately expanding and contracting focus. Analysis is hermeneutic and iterative, and proceeds via a constant comparative method. Thus, data collection and analysis are conducted in tandem. A dialectical relationship between library research and field research characterizes the inquiry. Researchers sample until saturation and redundancy are achieved, at which time they either conclude their inquiry, or adopt different techniques that may permit the transcending of the limits of researchers' habitual tools of choice.

Progressive contextualization is another important research strategy. Researchers grapple with the nesting and embedding of understanding. Because meaning is always situated, a heightened attention to the context in which a phenomenon unfolds is amply repaid. Contextual inquiry is a way to elicit some of the unarticulated, tacit knowledge, emotion, motivation, and understanding that people possess. Thus, researchers will often strive to understand how behavior will ramify beyond an individual to a household, a community, and, ultimately, to a society itself. Embeddedness is a critical concern.

In keeping with their desire to probe a range of behavior patterns, researchers attempt to make *maximized comparisons*. They use variation as a perspective for plumbing similarities and differences among phenomena. Thus, researchers roam across cultures, times, or situations to provoke variance. While the representativeness of a phenomenon is clearly of interest, researchers are equally—and often, perhaps even more—concerned with outliers. Outliers are embraced (rather than rejected) for the distinctive insight their marginality can contribute. A marginal perspective is often incisively illuminating.

Qualitative inquirers quest for *sensitized concepts*. They are interested in the lived experience of their informants and in representing that experience authentically. Capturing the worldview and ethos of informants, as distinct from an analytic framework imposed by the researcher, is at the heart of the inquiry. Often such investigation is idiographic, the goal being for the researcher to develop systematic intuitions about informants' life-worlds. Thus, informants are increasingly regarded as collaborators and consultants in the research enterprise, which itself becomes a co-created, jointly negotiated undertaking. The ultimate result of close attention to sensitized concepts is a so-called "thick description"[35] of the phenomenon under investigation.

Perhaps the most controversial hallmark of qualitative research is the notion of *intraceptive intuition*.[36] Simply stated, the researcher is the preeminent instrument of research. Believing that it is both impossible and undesirable to eliminate the impact of the inquirer upon the phenomenon, researchers attempt to increase their own acuity as an instrument through a variety of strategies (multimethod training, broad reading, wide experiential exposure, interpersonal skill development, psychoanalysis, introspection, personal disclosure in published research accounts, etc.) that both exalts and harnesses their idiosyncrasies. They strive to develop both wide cognitive peripheral vision[37] and broadly resonant emotional depth as indispensable aids to interpretation.

A final distinctive feature of current qualitative research is its emphasis on *grounded theory*.[38] Simply stated, theory is expected to emerge from the data. Because a researcher cannot approach a project with no a priori theories or hypotheses, and as a consequence of the rejection of a so-called objective or disinterested "fact," an inquirer strives to specify and disclose existing personal biases, but hold them in abeyance (in effect, "bracket" them) as the research regime unfolds. The posture adopted toward theory development is essentially an agnostic, eclectic one, which allows for the discovery and construction of broad, truly rival hypotheses.

The thrust of much recent qualitative work in marketing and consumer research has been critical, culturological, and communicative.[39] Researchers have explored extraeconomic and normative dimensions of behavior. They have worked steadily to unpack, dismantle, and banish the notion of "externality" from the literature. Finally, they have accelerated investigation

into the nature, transmutation, and translatability of "meaning" as these issues bear upon marketing and consumption.

SPECIFIC TECHNIQUES

Because of space constraints, we have been selective in our discussion of particular qualitative research techniques without being entirely reductionist. In this section, we describe these techniques which currently enjoy cutting-edge status—participant observation, interview, and projective tasking—among academics and practitioners. We also describe the practice of "close reading" or "hermeneutic tacking" that characterizes each of these techniques.[40] Finally, we consider the extension and application of techniques developed for use "in real life" to phenomena evolving in cyberspace.

Participant Observation

Properly speaking, participant observation is a cluster of techniques employed to discover, interpret, and represent phenomena comprehensively and holistically. Thorough analysis often depends on a negotiated understanding of informant and researcher's perspectives. Participant observation born of prolonged field immersion is the hallmark of ethnography. Alternately obtrusive and unobtrusive, the ethnographer apprehends, with as many sensory modalities and through as many experiential channels as required, the lifeworlds of the informant. The ethnographer is, in effect, acculturated or resocialized by informants, once a rapport is established, to apprehend the strange as familiar, or, more commonly in market research settings, the familiar as strange. Intimacy with stakeholders, achieved through trust evolved over time in context of the round of life, opens a window for ethnographers on the lifeworlds of informants.

Participant observation circumvents many of the problems associated with faulty recall, limited ability to articulate (whether tacit knowledge or the unthought known), and social desirability in self-disclosure. It is invaluable in mapping the ecology of consumer behavior and in providing inferential stimuli for probing its social structure and ideology.[41] It is especially useful in harnessing the marketer's offerings—products, services, advertisements, retail outlets, and so on—into projective stimuli to be used in conjunction with other techniques to unpack the production of consumption. Confronting informants with real time aspects of their lifeworlds in context is a powerful eliciting device.

Increasingly, photography, videography, and audiotaping are used as aids to participant observation. These tools are employed actively by the researcher to capture emergent behavior and create a visual inventory. Just as often, the tools are deployed passively to record material in the researcher's absence. Informants are deputized to photograph, audiotape, and videotape their own lifeworlds, with equipment provided by the researcher (or to behave "as usual" in front of recording equipment fixed and mounted in their personal environments). Such informant-produced insight is a productive complement to the researcher's inquiry.[42] Photos, videos, and audiotape diaries can then be used as projective vehicles to elicit additional informant commentary, in a practice called *autodriving*.[43]

Interviews

Interviews comprise a broad continuum of focused inquiry. At one end, interviews may be informal, unstructured, nondirective, and conversational. On the other end, they may be formal, highly structured, entirely directive, and administered identically across all informants. Interviews may be conducted with individuals or with groups. Interviews may be used to elicit sheer or mere information, in an actuarial or inventory sense. They are also used to enter the phenomenological-existential world of informants. Interviews depend for their success on the forging of bonds of trust between actors, the eliciting skills of the interviewer, and both the insightfulness and desire for disclosure of the informant.

An especially crucial practice for construing the interview is the temporary suspension of the researcher's voice of judgment. Imagining the question to be something more than a simple interrogatory is the key to this suspension. A question is an invitation to creativity, a point of departure; it is the search for a playmate, a form of seductive foreplay.[44] Ultimately, a question is a jointly negotiated quest for understanding, a partnership in an adventure. Learning to listen deeply is essential for the interviewer, since being heard is one of the most profound, humane gifts an individual will ever receive; listening deeply is the symbolic equivalent of holding the informant.[45]

It is our belief that the group interview is the most overused and misused arrow in the qualitative quiver. Focus groups often provide the illusion of human contact and the occasion of pyrotechnics that efficiently satisfy the prematurely narrowed imagination of clients and researchers behind the one-way glass. To exploit fully the potential of the group interview,[46] it may be necessary to conduct archival analysis, participant observation, and depth interviewing before convening a focus group. Briefing participants in advance of the session, or requesting "homework" of them prior to convening the group may yield dividends. Conducting a

variety of tasks during the group is often productive.[47] Altering conventional spatial and temporal boundaries of the session may also be indicated; groups can be conducted *in situ,* over hours and even days. The so-called moderator is simultaneously an over-used and underutilized resource. The moderator must facilitate interaction, alternately guide and probe the discussion, and analytically attend, in real time, to the verbal and nonverbal cues that enable systematic unpacking of the clients' interests as embodied in the group. Further, the moderator develops a theory in-use-on-the-fly to direct each subsequent group in the project. Finally, the moderator must deliver an interpretive analysis replete with managerial implications. Such demands require that we empower moderators to be more active (yet not more intrusive) than convention dictates, and that we partner them with confederates (on either side of the glass) to aid in the iterative process of data collection and analysis. This is easily enough accomplished in academic research, and could be routinized in proprietary research by deputizing and training client personnel.

Projective Tasking

It is instructive to consider the tension animating the multiphrenic self in postmodern society[48] from an evolutionary perspective. As a species, we have achieved distinction in no small measure thanks to the tension that modulates our principal personae: *homo faber* versus *homo narrans.* In our former aspect, we are tool-making creatures, and in our latter aspect, storytellers. While these two aspects co-exist and interact synergistically, they serve distinctive adaptive ends. Traditionally, marketers have treated primarily (indeed, have been) makers; only recently have they treated (indeed, become) storytellers. The webs of significance in which stakeholders are suspended[49] are becoming a focal interest.[50] How best to tap such meaning making?

Projective tasks engage our storytelling impulse. Such tasks permit the asking of questions in an indirect fashion and encourage the least restraint in their answering. Projectives invite informants to respond in ways that are distinctively personal and ostensibly personally meaningful. Projectives empower informants to respond in more creative, insightful, and revealing ways than might otherwise be possible. Inquiry is cast in dramatic form, and the drama essentially poses the question. Indirection is used in the service of illumination. Projectives plumb unconscious material, socially objectionable motivations, and informant fantasy; they elicit responses to issues informants may find too trivial or too sensitive to address directly.[51]

Although evolved in a clinical setting for use as a triangulating perspective to assist diagnoses in context, projectives have migrated into marketing and consumer research predominantly as stand-alone measures, modified to suit a nonclinical population. Recently, some researchers have cautioned against the a-contextual use of projectives.[52] Thematic apperception tasks have been most widely used. Sentence completion, figure drawing, word association, structured fantasizing, and collage creation have also proven popular. Often, these individual techniques are combined in a single study to enhance depth and richness of response, as well as to triangulate among techniques. For example, the Zaltman Metaphor Elicitation Technique[53] combines informant-selected images, depth interview, laddering, photo and art therapy techniques, sensory inventory, structured fantasizing and collage creation as eliciting frames.

Close Reading

A common analytic posture across the qualitative methods, tied intimately to intraceptive intuition, is the practice of close reading[54] or hermeneutic tacking.[55] Whether the analyst uses ethnography,[56] existential phenomenological interview,[57] projective tasking,[58] literary criticism[59] or introspection,[60] relentless attention to detail and painstaking relation of part to whole are key features of the enterprise. Working with a textual metaphor in the case of behavior, or with a literal text in the case of interview verbatims, the analyst attends in minute detail to the systematic unpacking of meanings present in the text. Recognizing that meaning is often polysemic, the analyst seeks to reveal—in dialogue with both "text" and "author"—as exhaustively as possible the levels and nuances of meaning embedded in the text. Some or much of the meaning thus wrested from the text may be opaque or transparent to the informant at the time of text production. For example, recently we have seen a shift from a close reading of advertising text[61] to text in reception;[62] we can imagine a longer term inquiry that moves from production through reception to re-production.

Ideally, a close reading produces the richest possible understanding of a "text" because all relevant information—internal and external—to the "text" is carefully considered. Relevance is broadly construed. That is, initial attention is riveted on the content, rhetoric and structure of the "text," and then this analysis ramifies to related "texts," which in turn both extends and amplifies the original analysis. The researcher tacks between and within internal and external information sources, in hermeneutic fashion, in search of enlightenment.

INTERPRETIVE SUMMARY

It is apparent how complementary and overlapping these techniques can be in their nature and application. Participant observation helps the analyst limn the informant's lifeworld, and permits the acquiring of systematic intuitions about worldview and ethos. Participation helps the researcher embody this knowledge and experience. Interviews take the researcher deeper into the phenomenal realm of the informant, allowing for a systematic exploration of the informant's physical and metaphysical experience. Projective tasking helps the analyst transcend his or her observational and elicitation skills, and affords access to unarticulated realms of informant experience. Each technique amplifies, reinforces, extends and challenges the others.

Given the evocative power of things (i.e., products, services, brands, servicescapes, trust relationships, advertising, and anything else in the marketing environment) and our human penchant for meaning mongering, qualitative methods used in consort can be powerfully illuminating. In this situation, consumer ethnographies[63] or customer visits[64] are most productive. Imagine a project conducted over time in sites significant to the customer, where all the artifacts in a given situation are meaningful to the customer. These artifacts (e.g., a brand, a relationship) are fundamental eliciting devices, set as they are in the consumption context. The artifact can be used as a projective task and contextual cues in evidence can be marshaled to elaborate, clarify, contest, and revise the customer's interpretations systematically via interview. Imagine further the analyst debriefing the customer systematically, sharing analytic interpretations of observations, interviews, and projectives, so that the customer might react constructively and critically and thereby improve the "final" interpretation. Such creative triangulation in contextual inquiry and collaboration in analysis is becoming more common.

EXPORTING QUALITATIVE TECHNIQUES TO CYBERSPACE

If part of our goal in using qualitative research is to enlarge our concept of the "really real," what better place to stretch than in the virtual reality of cyberspace? As a society we are consuming cyberspace as diversionary delight and wellspring of communitas and illumination. We are employing the expanded scope and resources of infotech to open and explore a vast range of market relations[65] and consumption servicescapes[66] in the marketspace[67] of

cyberspace. Resolved by a one-hour sale on AOL that drove over half a million customers through the digital door of an online retailer—a feat unimaginable in the "real" world—is the fact that informational networks are changing the shape of marketing and consumption forever.[68] No doubt marketing and consumer researchers, including qualitative inquirers, are impelled to follow in their wake. But, upon venturing forth into the contextual frontier of cyberspace, what ecology do we face?

Early research into the medium of *computer-mediated communication* (or CMC) found that its limitations forced an unnatural style of communication, reduced relational cues and impoverished the interpersonal environment.[69] Its anonymity and apparent privacy seemed to erode social structures by equalizing status and encouraging a less inhibited form of communication.[70] Early scientific voyages, then, found cyberspace to be like outer space: cold and inhospitable.[71] Yet field researchers have found it to be a much more generative medium when filtered into the phenomenological stream of lived experience. Cyberspace seen not as computer-mediated communication but as community is an organic entity, diverse, dynamic, and multitendrilled, a carnival of personally-enriching social worlds.[72] Ever-adaptable, the human animal has developed the new communicative tools and abilities to turn the cold online environment into a hearth of sociality.[73] New software and hardware tools and sophisticated avatars advance digitally upon perfectly real and perfectly fantastic simulations of face-to-face. In the meantime, an "electronic paralanguage" captures a range of affection, affiliation, social relational and metacommunicative cues.[74]

In cyberspace, human interaction must cope with (to borrow and fracture Milan Kundera's beautiful turn of phrase) an "unbearable textuality of being." The relationships change as a result of this intrusive and liberating filter on embodiment.[75] Communication that is *technologically mediated* is also radically textualized.[76] Whether our words are converted into ASCII or carried in (still crude) digital sounds and images, the intrusiveness of cyberspace communication channels is instantly obvious. While the medium is challenging us to overcome it and communicate in ways that feel more natural,[77] it is also opening opportunities.[78] Implied privacy and textuality confers experiences of *anonymous search and expression* that can be liberating in the extreme.[79] The leveling of a variety of social playing fields confers *social accessibility* that results in much wider participation than in almost any other social channel.[80] On the Internet no one knows you're a dog—or a kid, or white, or disabled, or living in Timbuktu. Being digital also means that social *information is inscribed and archived,* automatically[81] *and widely accessible.* With search costs vastly reduced, problem sets across the board

change from the collection of information to management of the hypertext cascade ensuing from even the most cursory search.

Cyberspace is a liminal locale, providing a placeless space and what anthropologist Victor Turner called a "time out of time." For the human species, the move into the altered time and space horizon of cyberspace presents a radical temporal and environmental discontinuity.[82] According to some, this change is an evolutionary one in which the thinking animals that make tools increasingly blur the distinction between tool and thinking animal. The result is a *cyborg ecology*[83] in which abstract being and embodied being, mind and AI, organism and machine comfortably coexist.[84] To help understand this ecology, qualitative inquiry can evolve along with it.

Netnography

From the raw material of bits and icons, people construct meaningful social communities. But whether called "virtual communities,"[85] "brand communities,"[86] "communities of interest"[87] or "Internet cultures,"[88] these groups use common marketplace interests as the social cement to form their foundation.[89] While, to a marketer's eye, some of the symbolic cues they use may look familiar, the challenge in cyberspace's twisted social arenas is often one of disentangling the message from the medium, and making familiar the strange and tortured dances of social cyberia. Encompassing online community, *netnography* has been developed as a naturalistic technique for capturing conduct in cyberspace.[90]

Netnography is an amalgam of qualitative techniques, adapted for cyberspatial environs.[91] Like participant-observation, it can be simultaneously obtrusive and unobtrusive. The act of "lurking" in online fields[92] offers an unobtrusiveness that blurs telepresence[93] to near invisibility. Yet netnography holds online participation to be a beneficial investigative movement.[94] Like its offline counterpart, it seeks *immersion,* a profound experiencing of digital sociality. Access to a wealth of data may make it easy to confuse breadth for depth, and mistake quantity for quality. But being acculturated into bravely evolving new social spheres requires *prolonged engagement.* This infers naturalizing the techno-environment and rules of engagement of the overall realm of cyberculture.[95] The body language of emoticons, intentional misspellings, lexical surrogates for vocal segregates, spatial arrays, grammatical markers, absence of corrections and capitalization, as well as visual ASCII art[96] will be essential gadgets in the netnographic inquirer's kitbag. Then, there are more specific codes to learn that pertain to your communities of choice, their personnel, their history and rules,[97] their relations to the offline servicescapes[98] of markets and consumption.[99]

In furtherance of this goal, trust is an essential catalyst. Honesty, a legitimate purpose, and a genuine firsthand knowledge of the community offer entrée modes of solid basis. Specifying the nature of quid pro quos and a common interest can fuel ongoing participation and ever-increasing access.[100] All the while, the ethics of the inquiry are double-edged and very real. Investigators must vigilantly attend to ever-evolving online privacy concerns.[101]

Through this endeavour, the adept cybernaut will be chronicling the journey through field or journal notes. The bulk of these notes will be self-transcribing—digital captures of the social flow. Introspection and the testing and elaboration of theory will be greatly assisted by additional fieldnotes which are reflective, analytical and which point to interesting directions for future investigation. Even as the technology's mediation textualizes and occludes researcher insights, it similarly places limits on what informants (consumers, marketers, other stakeholders) are able to articulate. Tacit knowledge is thus a difficult but essential prize to be sought in cyberspace. Gaining it requires discriminating and empathic elicitation, and can be greatly assisted by incorporation of two other techniques: the cyber-interview, and digital projectives.

Cyber-Interview

In a sense, the interview already permeates cyberspace. An almost unbounded interactional space, newsgroups, chat rooms and e-mail messages are filled with the interpersonal dialog of questions and answers. Informants expound and explore, sharing personal histories, anecdotes, urban myths and legends. Decoding and finding the common and the particular in the stories these people tell[102] is one important source of netnographic insight. Others are more proactive.

As prelude and adjunct to the cyber-interview, *e-profiling*[103] leverages cyberspace's unprecedented access to social information to bolster inquiry effectiveness. E-profiling entails gaining publicly-available information on an informant's public Internet social activities. Reading samples of an informant's postings and visiting the newsgroups to which they post regularly—or their personal Web-pages or profiles—can confer precious perceptions of their social situation, interpretive communities,[104] life themes and life goals,[105] and overall experiential multidimensionality.

Cyber-interviews offer a means of altering the conventional spatial and temporal boundaries of focus group sessions. In cutting-edge university and corporate labs around the globe, software and groupware is being tested for deployment in electronic focus groups. The focus group conducted through

teleconferencing software has been heralded as the major trend in focus group development.[106] As it by now may be obvious, cyber-interviews, like their offline counterparts, can be group-based or individual, formal or informal, structured or unstructured. The medium's technological characteristics are, however, directive. Particular interview styles fit particular cyber-forums better than others. So the synchronous, real time realm of chat rooms—with its conversational tone and its unfettered nature—is more suited to the informal interview that hopes for insight through heat-of-the-moment disclosure.[107] Posted newsgroup or e-mail questions offer a foundation of carefully considered answers often more appropriate to the aims of a formal interview.[108] "Persistent conversation" in any cyberspace forum can, nevertheless, lead to revelationary personal and emotional discovery.[109] Coupled with researcher genuineness, trust-building and heartfelt confession, these interviews—which can often seem a synthesis of penpal-like enthusiasm and ongoing tutelage[110]—can provide much disclosure and enlightenment. Coupling cyber-interviews with techniques that deploy digital projectives can enable access to more of the unknown and tacit levels of cultural knowledge.

Digital Projectives

Postmodernist Jean Baudrillard has coined the term *hyperreality*[111] to refer to the contemporary blending of simulation and reality, the place where the artifice and the authentic merge, and where the synthetic illusion is often deemed preferable to the concrete original. Although Baudrillard's is an often pessimistic view,[112] the information economy seems almost custom-built to blur boundaries[113] offering nearly limitless alternatives for losing oneself in simulation. The stream of prospective multimedia stimuli that online informants engage with encompasses ASCII texts and other representational codes, visual imagery such as logos and photos, sound bits and video bytes, avatars and live teleconferencing images. As with Baudrillard's creeping hyperreality, almost every "thing" in the physical world is coming to have, in cyberspace, at least one and usually a multitude of virtual doppelgangers.

With multifarious choices arraying everything from Scientology and UFO conspiracies to V-chip technical standards and the latest lampshade fashions, in some ways, cyberspace itself might be construed as a gigantic projective task. In anonymous and accessible telespace, it affords a forum for the articulation of the previously inexpressible. Turkle says that the Internet has become "a significant social laboratory" in which people experiment

with "the constructions and reconstructions of self" which characterize contemporary life.[114] Postmodern identity has been conceived as consisting of endless acts of refashioning and re-creating our selves.[115] In the play of cyberspace, a virtual playground is constructed. Netnographers in this space are lurkers on the side and fellow playmates. Qualitative inquiry delves into the revelatory possibilities of this serious site of play and identity creation, observing the multiplicity, heterogeneity, and fragmentation of the multiphrenic consumer in action.[116]

Cyberspace is said to be based on an "attention economy," in which the scarcest resource is not money or any other resource, but human attention.[117] Capturing and holding the attention of cyberspace informants is thus a central challenge. Formally instituting the projective properties of cyberspace, a *Web-based intrication strategy*[118] can help capture the attention and imagination of informants. A research homepage that provides detailed visual and textual material on topics targeted to the particular interests of cultural informants can be an invaluable means of intrication. Open-ended questions, word completion tasks, even requests for scanned artworks and doodles can also appear. This strategy can also make use of computer-translations of existing projective tasks, for instance, autodriving.[119] Zaltman's aforementioned Metaphor Elicitation Technique has already been digitized. Consumers use magazine photos to synthesize paper-based collages expressing brand or product hypostasis. The collage is digitally scanned, polished by a graphic designer and drafted into service as a powerful projective probe. Sensibly customized, the technique easily transports to cyberspace. In summary, the artifacts used as projectives by the qualitative inquirer in cyberspace are abstract renditions, representations once removed. But through the online construction of sociocultural reality,[120] these digital images, Webpage, or content elements of a Web-page undergo a psychological and ontological transmutation. They achieve a status considered—within limits—"real," thereby becoming useful tools of cultural exploration.

Nuance and Compromise

In the context of cyberspace, contextual inquiry morphs to accommodate its technological mediation, radical textualization, anonymous search and expression, and accessible information and social arenas. Tradeoffs are critical to netnographic inquiry. Cyberspace decontextualizes by removing physical facets of identity we naturalize as useful.[121] Self-selection and representativeness are sticky and difficult issues. A textualized way of knowing reduces the number of observable cues, and the opportunities to discern

tacit knowledge. In exchange, it recontextualizes identity by infusing it with fantasy, play and interactivity.[122] Paradoxically, a realm of deception can increase disclosure. A home-based excursion into virtual reality can offer not only a more dynamic and accessible context than a laboratory but a far less artificial one. In keeping with our theme of complementarity between methods of investigation, netnography—with its cyber-interviews and digital projectives—must be understood as adding to, not replacing, offline research (of both the qualitative and quantitative persuasions). In addition, information technology transforms qualitative inquiry in a myriad of other ways. It changes the nature of in-person inquiry and recording, data analysis, triangulation, member checks, and research representation.[123] It can provide fresh perspectives for triangulating upon cultural actors as they engage in new forms of expression and experience. These methods may thus assist our understanding, not only of the virtual, but of the human reality.

CRISIS OF REPRESENTATION

As qualitative research evolves into the next historical epoch—the so-called sixth moment[124]—it is animated by a number of tensions, some of which, like technology, we have explored in detail in this chapter. Issues of reflexivity and legitimization, that is, the situatedness of knowledge claims and authority of interpretation, though broached here, must be deferred for extended discussion to subsequent papers. Polyvocality and representation, the emergence of contrasting stakeholder voices and agendas, and the challenge to depict authentically the lived experience of others,[125] require a ritual bow in our present treatment, however, since they form collectively one of the most interesting challenges to the marketing imagination.

Having spent so much time trying to achieve intimate understanding of marketplace behavior through communion with consumers and managers via methodological means, qualitative researchers have now turned their attention to the vehicles used to represent their interpretive efforts. Recall our earlier discussion of the foundational importance of storytelling, then note its neglect in our disciplines' research stories. Not only are we slow to plumb the possibilities of text, let alone hypertext, or of dialogic let alone polylogic discourse, but also we are just beginning to imagine the shape a nonlinear, nondiscursive, nonliterate representation might assume.

Consumer researchers have begun asserting[126] that conventional journal articles are insufficient vessels for conveying a holistic understanding of the lived experience of stakeholders. We have seen the emergence of genres such as "messy texts," autoethnography, poetry, performance texts, ethnographic fictions and narratives of the self[127] in consumer research. Photography,

videography and painting have also emerged as research vehicles. Exemplars of such experimental representation are proliferating.[128]

Managers as well as academics have responded to the crisis of representation by embracing new expressive strategies. With a shift toward interpretive management, companies such as Levi Strauss, Intel, Motorola, Nokia, and Chiron have sought to enfranchise polyvocality in everyday operations, and promote multistranded discussions of the future among stakeholders and constituents.[129] 3M invokes storytelling in the service of business planning, exploiting narrative logic to plumb the places that bullet points can't reach.[130] Arguably, the increasing emplacement[131] of brand essence in vehicles such as retail theatre and Web sites is a creative response to the crisis of representation.

With its holistic, often visual qualities, qualitative research is, in many ways, cinematic in its gaze.[132] To represent findings, the interactive multimedia formats afforded by information technologies are not only ideal, but also alter the nature of representation itself. Hypertext and hypermedia (links to audio and visual information) change the relationship between researcher and reader in ways eerily attuned to the concerns of the crisis of representation.[133]

Described by some as a relatively unproblematic change in reporting opportunities,[134] this change is viewed by others as a radical departure in which the research writer "disappears, receding into the background."[135] From this perspective, final authority is conferred upon the text's new author, the point-and-click *bricoleurs* who, "in the electronic spaces of hypertext . . . construct the text out of the bits and pieces and chunks of material left for them by the writer" (ibid). Others emphasize the accessibility of the entire cyberspatial modality by envisioning hypertext netnographies linked to myriad Web-pages, Web-ring and chat rooms.[136] Hypertext netnographies are data rich, and provide opportunities for "open" textual construction,[137] real-time cultural observation, and unmediated contact with informants. They can transcend the uniformity and voyeurism of traditional ethnography's thick description, transcription and even inscription[138] to approach the stimulation of sociosimulation.[139]

CONCLUSIONS

As cultural life transforms, becoming more fragmented and diverse, so also do the methods of researching it. Marketing and consumer researchers are increasingly thinking about their task in terms that are naturalistic and holistic, and that deftly combine complementary methods. They blend (and apply) their art and science in ways that seek to reveal the sophisticated

configurations, the constellation of lifeways and interests that undergird markets and consumption. In some cases, these configurations can be observed simply by watching what people do with artifacts such as products, advertisements or brands. For others, watching someone surf the net, observing the way their lifeways intersect with cyberspaceways can provide provisional clues. Almost always, the complementarity of multimethod techniques provides more comprehensive perspectives. Extending our knowledge into the lifeworlds of human beings in interaction means following them, seeing with their eyes as well as our own.

Branching out into real spaces and cyberspaces is empowering. Viewing markets and consumption holistically means opening vistas that encourage interdisciplinary, multidisciplinary and even transdisciplinary thinking. Setting our sites on longer term inquiries will allow researcher to scope out new cultural processes in the production, reception and the reproduction of meanings.[140] Many companies are just beginning to use virtual communities for lead user analysis[141]—blurring the bounds between production and consumption as customers serve as fountainheads of corporate innovation. The new questions and problems these processes propose are far from simplistic. Indeed, the intersection of cultures, markets and cyberspace are bound to become the source of the most pressing ethical and moral issues of the next few decades. Perhaps some of these techniques and ideas might be helpful in the investigations that will inform these urgent and important debates.

As it unfolds in cyberspace and IRL, we believe the future of qualitative inquiry in marketing and consumer research hinges upon the posture adopted toward the practice of "deep hanging out." The social sciences are simultaneously relinquishing[142] and re-embracing[143] the tradition of prolonged local immersion that results in nuanced interpretation of field data. At this point in their intellectual evolution, our disciplines require the kind of deep hanging out that permits researchers to infuse our databases with soul. Deep hanging out—the kind of loitering with intent that positions the marketer to become the marine biologist (not simply the fisherman) to the consumer's fish[144]—is a necessary corrective to premature closure and the rush to generalization. We hope we have provided enough guidance in this chapter to provoke our readers to dwell for awhile among the deep hangers-out, in search of more intimate understanding of marketplace behavior.

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CHAPTER 9

QUANTITATIVE MARKETING RESEARCH

DAWN IACOBUCCI

"Market sensing," "listening posts," "data mining," "customer connections," "competitive intelligence" . . . all of these currently used buzzwords express aspects of marketing research. Data availability and opportunities have exploded in recent years. Yet in the presence of vast data, managers simultaneously express the urgent need for information. Good marketing research methods are those that transform data into useful information. The definitions of marketing research that we at Kellogg find most useful in teaching are those that emphasize the role of research in assisting managers in making optimal decisions.[1] The business world is moving increasingly faster, with multitudes of marketplace decisions requiring resolution every day, and well-conducted marketing research tools are valuable in asking and answering the right questions.

Accordingly, in this chapter, we explore a number of marketing decisions that can be illuminated through analysis. We focus on two new research tools: first, the relatively new class of *network data* and its requisite models, and second, *collaborative filtering* which is the novel application to e-commerce of cluster analysis. Researchers can use both of these methods to derive insight regarding customers and competitors. To demonstrate the utility of these new data and methods and put their potential contributions into perspective, we begin by presenting a brief framework to give an overview structure of marketing research analytics.[2]

EXPLORATORY, DESCRIPTIVE, CAUSAL

Marketing research often progresses from exploratory methods to descriptive techniques to causal manipulations. The focus of inquiry for exploratory methods (e.g., focus groups, interviews, open-ended items on surveys) is depth and richness of understanding, but not detailed numerics to be

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