

# Understanding retail experiences – the case for ethnography

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Retailers develop branded experiences in order to enhance consumers' perceptions of the brand and bring the brand to life. Consumers are effectively immersed in a branded world and experience the brand on a cognitive, emotional and visceral level. Yet, to date, our understanding of retail experience has been limited to studies on the effect of one or two variables (such as music and light) on perceptions of the store. Few researchers have focused on how consumers experience the store on a holistic level. As a result, our understanding of retail experiences is limited to reports on short-term personal visits of stores from consultants, or quantitative assessments of certain design or experiential variables conducted in experimental situations, usually with student subjects. This paper makes a case for more ethnographic research examining how consumers experience themed retail spaces to achieve greater understanding of the whole retail experience. The paper proposes a 'toolkit' for marketing researchers that will assist with the collection of dynamic data from the experiential retail environment, including the contextual shifts of the consumer (from home, to store, and post-consumption). In addition, it identifies a number of suggested strategies for conducting, analysing and interpreting retail ethnography based on practitioner insights and the authors' own experience in the field.

## **Introduction**

In order to enhance consumers' emotional connections to the brand and provide a point of differentiation in a hyper-competitive environment, retailers have increasingly turned their attention to creating memorable retail experiences, which appeal to consumers at a physical and

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psychological level. For example, in 2001 Apple changed direction and initiated the retailing of experience offer through the Apple Store Experience. With the aim of switching customers to Apple (as well as enhancing the relationship with current consumers), the themed stores allow customers to interact, learn and experience the values of the brand through in-store design features and staff service. More importantly, rather than having products arranged via category (i.e. printers, software, digital camera, iPods, monitors, cases, etc.), merchandise is combined and arranged according to how consumers might use the equipment in their everyday life, thus seeking to locate the brand in realistic consumer settings. The aim of such experiential retail stores is to create outlets that capture and represent the brand's essence, while balancing both the functional components of the product (what it does) with its emotional goals (how it makes me feel) (Pine & Gilmore 1999; Schmitt 2003). Experiential retail strategies facilitate the creation of emotional attachments, which help customers obtain a higher degree of possessive control over in-store activities (Schmitt 2003). In a sense these strategies allow consumers to *become* through immersion within the holistic experience design, often creating flow-type experiences (Csikszentmihalyi 1997).<sup>1</sup> To clarify, customers become their own icon by developing their self-identity (who they are and what they represent) through what they consume, own and possess. This is known as the extended-self, which is the development of the individual's identity through the association and collection of objects, events and experiences (Belk 1988).

However, with a few exceptions, the existing experiential retail literature has focused mainly on the isolated testing of static design elements (i.e. atmospherics, ambient conditions, servicescape architecture) of retail stores (Turley & Milliman 2000). For example, current research often examines the effect of different styles of music on store or product quality perception, rather than how consumers holistically experience music in a branded space. However, qualitative research reveals that consumers process in-store music in a rich context of brand knowledge and perception, in-store cues such as other atmospheric and design features, and the look, age and dress of staff. In comparison, quantitative research that focuses on how to increase quality perceptions through leveraging one 'sense' could lead to perceptions of misfit between this variable and the brand, resulting in consumer confusion (Beverland *et al.* 2006).

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<sup>1</sup> A flow experience is the optimal cohesion between experiential elements, which leads to customer engagement, complete involvement, immersion, concentration, enjoyment, and intrinsic interest, which may result in a sense of time distortion (i.e. becoming lost in the moment) (Csikszentmihalyi 1997).

Nevertheless, researchers can offer only limited advice on how hard design (static in-store features such as lighting), and softer human elements (dynamic features such as service) combine to make an effective or ineffective in-store experience (Pine & Gilmore 1999). For this reason experiential retail concepts are facing a critical point of strategic uncertainty as managers and academics grapple with their significance; are retail experiences important for retail competitiveness, or a conceptual myth? The authors propose that ethnographic research offers the potential for a way forward in our understanding of retail experiences.

This paper aims to provide marketing researchers with a practical guide for researching experiential retail strategies. As such, this includes: (1) identifying the nature of the retail experience in order to build a case for greater use of ethnography in this area; (2) showing how researchers can use ethnography to ‘capture the right experience’ by highlighting the benefits ethnography provides over traditional qualitative techniques (i.e. focus groups); (3) discussing how practitioners can use ethnography to determine their experiential capabilities; (4) providing a ‘practitioner’s toolkit’ of mixed methods that can be combined to capture data from the holistic retail setting (the benefits, limitations and implications of each are also discussed); (5) showing researchers how to ‘think ethnographically’ with methods for analysis and interpretation of qualitative data (‘packing and unpacking’); (6) outlining methods for maintaining objectivity and quality of qualitative output; and finally (7) providing a guide for developing a ‘managerial summary’ that will help researchers inform managers of their experiential position.

### **The nature of the retail experience**

While researchers have studied the retail experience at the level of individual components, the practitioners and academics that developed the concept designed it to function as a holistic mechanism. For example, Pine and Gilmore (1999) identified that retail experiences consist of holistic realms (aesthetic, entertainment, education, escapist), which allow flow between the various *static* and *dynamic* elements within the experiential environment. It is the flow between static and dynamic elements that helps the consumer to become immersed and engaged within the retail event (Csikszentmihalyi 1997). For this reason experiential elements do not work in isolation; they function as a holistic mechanism driving the customer’s retail experience. Each of these elements will now be discussed.

Static design elements are the cold, hard, tangible features of the store that facilitate the functional characteristics of the product(s), and the sensual and psychological benefits that emanate from the store's hard design features. These benefits include sensory pleasures such as sights and sounds, and feelings of status, privacy and security (Pullman & Gross 2004). Schmitt (2003) describes static elements as aesthetic qualities that include: (1) the physical goods (its functional attributes); (2) the look and feel of the store, which includes the logos and signage, packaging, brochures and advertising that help to establish the store's identity and brand experience; and (3) the experiential theme/message. In addition, static design elements are represented by the atmospheric/ambient conditions of the store (visual, aural, olfactory and tactile cues), which can be used to increase a consumer's rate of consumption, and influence customer product evaluations and purchase behaviour. These elements are considered to be static as they are delivered in a pre-designed state.

An example of an aesthetic environment that uses hard design features is luxury fashion retailer Prada. In 1999 Prada decided to expand its small fashion boutique chain with a collection of large-scale epicentres/flagship stores. These stores were developed to strengthen Prada's brand image by extending the company's core competency (cutting-edge design) into the physical design space of their stores. Using renowned architect Rem Koolhaas, Prada infused high-concept design features into its SoHo (New York) store. For example, dressing rooms incorporate glass walls that can change opacity at the push of a button, elevators are made of glass with no visible metallic joints or parts, and merchandise is suspended from the ceilings. In addition, the store's central focal point, The Wave, includes a set of parallel steps that descend below ground level to create a display space for shoes and fashion show performances for shoppers.

Static design factors, like those in the example of Prada, help to create environmental conditions and communicate messages, which allow the customer to infer product qualities and make informed consumption decisions. Where product knowledge is limited, the customer's ability to make appropriate inferences about product solutions and brand qualities becomes very important. Furthermore, consumers that have low or incomplete product knowledge tend to base purchase decisions on inferences they make from various information cues communicated by the hard design features of the retail context.

In contrast, *dynamic elements* relate to the exchange of dynamic information, which emphasises human interaction through the customer–staff–store interface (Schmitt 2003). Pullman and Gross (2004)

define the store's dynamic element as the relational context between the customer, the store, the staff and other customers. The relational context allows the customer to identify with the retailer via their interaction with the human/warm/soft/dynamic elements of the store, which helps to create a sense of belonging. In addition, dynamic design elements consist of themes and theatrics, which extend upon the warmer human side of the interactive in-store experience. Themes can be described as the symbolic narrative or memes that run throughout the retail outlet (Kozinets *et al.* 2002). The symbols employed create a design consistency (flavour) and story that may reflect a period, place and fantasy. Examples of themed stores include Apple, REI, Nike Town and Disney. Themes can be combined with human actors, or staff members that personify the narrative, bringing the store to life and facilitating the in-store experience.

Retail theatre is a distinguishing characteristic of this dynamic element. Retail theatre conducts the level of customer interaction within the retail store. Every action perceived by the audience contributes to the total experience being staged. The aim of retail theatre is to use these dynamic interactions so that the boundaries between the service provider and customer may be diffused. Through the process of interaction customers gain a sense of organisational citizenship and perceive themselves as having a degree of control over the operations of the store and the value created from their interaction. In this context Vargo and Lusch (2004) identify that the customer becomes a co-producer in the value creation process. In order to consume the product and create value the customer must become an actor within the retail experience, taking cues from the static environment of the store in order to produce the dynamic characteristic of the retail experience.

An example of this collaboration between static and dynamic elements includes American outdoor adventure retailer, REI. To assist customers in selecting the right equipment for rock climbing, REI has incorporated a rock-climbing centrepiece (housed within a multiple-storey glass building) into its flagship store. Customers are free to try equipment using the multi-storey replication of a rock face, and immerse themselves within the activity of the rock climb. Customers now take on the role of adventurer, playing an active role in the experiential phenomenon. Kozinets *et al.* (2002) agree that examples like REI allow the customer to adopt deep levels of immersion and interaction within their fantasy role. The escapist context enables the customer to become fully immersed and engaged as the central protagonist within *their* surroundings. REI emphasises the interaction between the customer, the store environment and staff

members, all of which are designed to increase the impact of the overall retail experience. Essentially, the experience revolves around the customer as if he or she were a critical component of a grand theatrical fantasy.

It can be seen that the retail experience is an emotional labyrinth in addition to being a physical store layout. For this reason experiential retail strategies are multifaceted. The combinations of static and dynamic elements supply a rich tapestry of hedonic activity, which provides customers with rich emotional benefits. While the customer explores their environment they receive an exciting, entertaining and playful form of retail consumption (Holbrook 1999). Their shopping trip becomes an adventurous journey, not defined by the act of consumption but rather by experiencing holistic immersion (i.e. sensory, enjoyment, fun, pleasure, gratification, social encounter, inspiration) (Arnould & Reynolds 2003). As such, researchers are required to experience and witness customer immersion within the fluid mix of in-store elements. Kozinets *et al.* (2002) suggest that ethnographic methodologies will allow researchers to holistically understand the retail phenomenon by immersing the researcher in the field and experiencing the events of the retail store. Consequently, we propose that ethnography is essential for capturing the natural flow of this holistic phenomenon.

Ethnographic approaches provide a holistic account of the experiential retail phenomenon through understanding, description and interpretation (Denzin & Lincoln 2005). To understand the retail experience, the researcher is required to look at a wider sweep of contexts, such as temporal, spatial, social and personal. For this reason, ethnography provides a suitable vehicle for data collection and analysis.

Ethnography can benefit experiential retail research by confronting and capturing human activities. It exposes (more directly) the nature of transactions between the investigator, consumer and object, by allowing the customer and investigator to clearly articulate/express their own understanding. The retail experience cannot be understood by merely drawing a logical conclusion; however, the empirical methods of ethnography (mystery shopping, accompanied shopping, informant video diary, etc.) allow us to see what customers do in order to understand and make sense of the retail environment. In addition, ethnography allows researchers to explore and engage in the discovery of meanings within the authentic context of the customer retail outlet. Here the researcher can experience what is being expressed, listen to what is being said and witness what is being done. The benefit of ethnography is increased by its grounding in the field. The researcher is not only privy to personal

accounts and details of consumers but also facts that are linked to the real environment, which allows researchers to see and understand what is happening with their client's store.

### **Capturing the consumer retail experience: the benefits of ethnography**

It can be seen that marketers need to ascertain how retail experience strategies impact on their customer in-store and post-purchase activities (such as brand relationships, product usage, retail navigation and in-store communications). However, considering the degree of time and resources that ethnography requires, the questions that researchers face are: how can ethnography help, how can it be used correctly, and is there any real benefit? Furthermore, how can managers use ethnography to determine their experiential position, without ending up with a collection of poetic musings from a researcher's diary? Specifically, how is ethnography more beneficial than traditional techniques (i.e. focus groups and interviews)?

To place things in perspective it is important to highlight the benefits that ethnography can provide for researchers. The most significant benefit is context. Ethnographic research does not take place in a laboratory setting or artificial simulation but rather in the homes and retail settings that customers frequent at their own leisure (Corner 2004). Ethnographers go to the places where people like to conduct their activities, so the main drawback is that researchers gain an insider's look into the living and authentic 'world' of their subject. Second, it is also possible to see what consumers bring with them to the retail environment in terms of expectations and beliefs about particular brands/products and how these beliefs shift over the course of their consumption journey (from home, to store, and home again). Third, the participants are treated as experts, meaning that researchers listen and focus on the authentic expression of the consumer. Their view of the world is important (Thorpe 2003). This can lead researchers to new insights on product/market gaps, usage scenarios, and relevance of brands to customers' everyday lives.

From an experience perspective, insights from a 'living' retail environment can lead to revelations on how to tailor experiential designs to: (1) the customer's desired level of functionality; (2) the correct emotional characteristics that facilitate consumption; (3) types of behavioural responses to holistic in-store cues (are these cues really working?); (4) ongoing relationships with the store brand after they have left the store; (5) how the experience design fits with the store brand; and

(6) is the current/proposed experience strategy an avenue for competitiveness? As Mariampolski (1999) states, the physical and situational surroundings, which provide a basis for the meaning and significance related to roles and behaviours, cannot be separated from the way we buy, or how we feel about it. The basis of the experience is that it evokes feelings and immediate behavioural responses that subjects may not be able to articulate. For this reason, if managers are to design the right experience for their outlet, contextual ethnography must be used to avoid misrepresentation of what consumers are looking for in an experiential format.

In addition, one of the critical limitations of traditional qualitative methods, such as focus groups and interviews, is that people do not always say what they mean. By participating in the experiential retail environment, researchers are able to overcome this concern and many others (Desai 2002); for example, (1) informants succumbing to social pressures to say what they believe to be the right thing, or what they believe the interviewer wants to hear; (2) informants not being able to articulate what they truly mean – for instance, Underhill (1999) provides the example of consumers shopping for CD players. He notes that most consumers open and close the lid as a way of judging the product's quality; however, when interviewed about their reasons for purchasing the player, they would be inclined to talk about the technical specifications, rather than the delightful 'clunk' as it shuts. Furthermore, researchers are able to overcome: (3) diminished recollection/memory; and (4) ethical issues such as the interviewer misleading the conversation or misusing their position of authority to satisfy their own agenda.

The limitations of informant questioning became apparent in a series of recent customer focus groups conducted by the authors for a lifestyle paint retailer in late 2006. One of the key objectives of the focus groups was to find out if informants could easily translate experiential concepts to a paint setting (i.e. escapist forms of interaction through the use of paint products in-store, with a strong aesthetic that communicated core brand values). We were specifically trying to identify what natural competencies paint retailers had, which could facilitate the design of an experiential layout. Informants were recruited through a market research firm and had their shopping habits qualified (i.e. were over 18 years of age and had visited a paint store in the last six months). In total there were three groups (two were all female, while the third was mixed) with 20 informants.

When informants were asked about what they expected to see inside a paint store with an emphasis on escapist dimensions, many informants

showed difficulty in accepting the concept. Specifically, informants stated that:

It would be messy.

I can't really see it, I'm going to browse and purchase ... I think there is a lot of preparation and it is such a messy thing.

I think people go into a paint shop for two things. They go in for the texture and, if they can, go through lots of splotches and feel they should be able to go into rooms and look at different light, and that they are not interested in painting while they are there, they may have children with them and that they are only interested in seeing the colour in the biggest frame possible ... and what it will look like afterwards.

I don't think people want to get messy.

Considering those examples the recreational type things, I think it goes well.

If they had a lot of painting ahead of them, why would you want to paint more in-store?

The first thing we noticed about this line of response was that as soon as one respondent mentioned in-store painting would be 'messy' the entire group fixated on the same topic, which narrowed the scope of the discussion. Second, informants automatically associated physical interaction and paint with chore-like activities. Third, informants were not able to make the connection between painting and other forms of escapism, such as interaction with staff, other events or the impact of environmental designs.

Following this outcome we conducted a two-week ethnographic study inside two retail paint stores to see how the focus group responses compared against what people were actually doing while they shopped for paint. In an interesting turn of events, what we actually saw regarding escapist interaction contradicted what informants had stated about interaction being undesirable. Consider the following ethnographic example (note, informant names have been changed):

David is a repeat customer of the store. He is talking with colour consultant Cathy for advice on choosing the right paintbrush for a task he is working on at home. He has a style of brush in mind and I hear David mention that he is concerned about choosing the wrong type for the job. To assist David, Cathy invites him to take part in a demonstration. David accepts and the two of them move to the back of the store, which houses a workbench adorned with a flat one-metre long plasterboard. Cathy talks to David about the different types of brushes, along with the preferred way of painting a new surface. Cathy fills a small tray with red-brown paint. Using a paintbrush selected by David, Cathy begins to perform a delicate criss-cross motion on the white plasterboard, while discussing her actions with David.

A brush is handed to David and he begins to gingerly mirror Cathy's actions. Cathy compliments David on his effort and reassures him of his brush strokes. He is pleased with himself and is soon smiling with delight at his finely placed strokes. David's confidence picks up and Cathy reconfirms that each stroke should be moderate and controlled. After several minutes David and Cathy have become somewhat silent, which is evidence of their immersion in the activity. A form of creative role-playing seems to have emerged (David is becoming the artist) and replaces their need to verbally communicate; they appear very comfortable with each other. David and Cathy seem to be embraced by a serene form of interaction and show no signs of fatigue as they continue painting.

In this example David and Cathy have elevated their functional role (i.e. information search) into one of immersion, interaction, engagement and creation. By adopting a physical role, David and Cathy were free to 'let go' and embrace the activity. Pine and Gilmore (1999) acknowledge that immersion and interaction are dimensions of the engagement process and it became apparent that pleasure experienced by both individuals elevates the activity from a chore to an engaging event. Upon seeing multiple interactions like these unfold it became clear that the paint store did in fact have potential for developing escapist or educational competencies.

What this confirmed was that behaviours and attitudes are context dependent. As discussed by Gordon (2006), people behave differently in different circumstances. The attitudes and behaviours that people express alter, depending on the 'who', 'what', 'where' and 'why' of the situation. If we had left our research at the questioning level, we may have misinterpreted the retailer's experiential capabilities. For managers, the impact of this potential oversight would have been dramatic. It is not merely enough to believe what customers tell researchers; it should be challenged by checking the quality of their dialogue, which may be done via observing how they behave. The reality is that language has its limitations. Informants can change their opinion easily, which adds to the subjective burden of the data. However, as seen with our example, using ethnography to capture human behaviour and assess divergences between verbal and non-verbal messages we were able to overcome the limitations of the focus group data. Subjectivity can be minimised if we research what informants do, not just what they say.

### **The practitioner's toolkit: doing ethnography in the experiential setting**

The holistic environment is of significant interest to researchers of experiential conditions. The lighting, odours, displays, activities, arrangement

of merchandise, size and style of the interior design/architecture, each impact on the rate and willingness of consumers to make purchases (Mariampolski 1999). However, consumers also bring with them expectations, histories with products (both good and bad) and preferences for rival brands. The customer's transition through different contexts and experiences (i.e. from home to retail outlet) allows them to bring with them a host of agents that influence behaviour. In addition, changes in context also lead to shifts in consumer identities. As consumers move through brands, product categories and usage scenarios, they adopt different identities depending on the needs that are evoked. For this reason, it is important for researchers to explore how and when these shifts occur, especially if managers are to ensure that their brand is meeting those changing needs as effectively as possible. For the researcher, the challenge is to capture this lifestyle progression in order to understand how the experiential retail design may best fit with customers' natural behaviour and their emotional needs: whether consumers wish to learn about packaged products, like Apple Store's educational offering; become immersed in the elegant design of Prada's lush fashion gallery; satisfy an adrenalin rush with REI's adventurous in-store rock-climbing activities; or pick up a paint brush, as in our paint store example.

For experiential retailers (or managers looking to determine their experiential position), a collective method that captures the dynamic nature of the consumer's lifestyle is required if managers are to avoid misinterpreting what customers want from their experience. Specifically, managers need to know 'when and how their brands are being used, what feelings and contexts are associated with their brand, what sorts of social experiences are happening when their brand is being consumed [this is inclusive of the retail experience that contributes to the total product and living in-store brand being offered], who else is likely to be there, what are they doing, and what they will be talking about' (Desai 2002, p. 22). To answer these questions, and manage the contextual shifts of the consumer, a bricolage of ethnographic techniques should be used to unlock the potential of the retail outlet (Thorpe 2003).

There are numerous ethnographic tools available to researchers that will ensure the holistic experience is captured for analysis. The ones marketing researchers choose will depend largely on the objectives of the study, or the questions (as previously mentioned) looking to be addressed. Several key methods are outlined in Table 1, including the advantages, disadvantages and implications, plus practical examples where appropriate. The table is followed by a brief discussion of each method.

**Table 1** Practitioner’s toolkit: methods of ethnography

Method	Benefit	Limitation	Implication
Accompanied shopping	<ul style="list-style-type: none"> <li>• Allows for the real-time observation of a living-shopping event across contexts</li> <li>• Researcher gains closer insight into behaviours, thoughts and feelings across contexts</li> <li>• Examples of insights include: what activities unfold in the store, what experiential activities respondents enjoy/do not enjoy, how many experiential messages are recalled, degree of immersion, how the store and its products influence the customer once home, and whether the experiential encounter provides a lasting appeal towards the store’s brand</li> <li>• Develop long-lasting interactive relationships that assist with conversations and facilitating natural behaviour</li> </ul>	<ul style="list-style-type: none"> <li>• Overt involvement may impact on customer behaviour</li> <li>• Customers may conceal the true nature of what they actually do while they are shopping</li> <li>• Changes in their natural routine due to researcher involvement</li> <li>• Informants becoming overly self-aware of their behaviour</li> <li>• Informants project an image that they believe will satisfy the researcher’s aims</li> <li>• Informants may overplay/underplay the significance of experiential activities encountered during the in-store trip</li> </ul>	<ul style="list-style-type: none"> <li>• Accompanied shopping is an insightful way of finding out how experiential encounters extend themselves to the post-purchase context (i.e. at home)</li> <li>• Complemented with minor interviewing it is possible to reveal how customers think and feel about their retail journey</li> <li>• Researchers can determine if the in-store environment is memorable</li> <li>• Concern over informants misdirecting the researcher away from natural behaviour</li> <li>• The MRS Code of Conduct (2005) outlines several rules that researchers should follow to ensure they protect informants (such as rule A10):             <ul style="list-style-type: none"> <li>– the need to be sensitive to the possibility that their presence may, at times, be seen as an unwarranted intrusion</li> <li>– the need to be sensitive to the risk that respondents may become overinvolved with the researcher at a personal level</li> <li>– the need to be sensitive to the possibility of ‘observation fatigue’</li> <li>– for additional information on the Code of Conduct see: <a href="http://www.mrs.org.uk/standards/codeconduct.htm">http://www.mrs.org.uk/standards/codeconduct.htm</a></li> </ul> </li> </ul>

(continued)

**Table 1** Practitioner’s toolkit: methods of ethnography (continued)

<b>Method</b>	<b>Benefit</b>	<b>Limitation</b>	<b>Implication</b>
Informant video diary	<ul style="list-style-type: none"> <li>• Provides access to the private thoughts and insights of the informant</li> <li>• The absence of a researcher facilitates natural reflection with minimal interference</li> <li>• Provides insight into the informant’s world – how they think, feel and behave</li> <li>• Researchers can judge expressive reactions of the informant’s consciousness as they recount memories</li> <li>• Assists with the identification of experiential elements memorable to the consumer</li> <li>• Informants tell their story relying on their own recollection, which interviewing can bias through questioning</li> </ul>	<ul style="list-style-type: none"> <li>• Informants bring their own bias to the recording</li> <li>• Respondents can be selective with the topics they discuss and they may perform for the camera</li> <li>• May not capture the holistic expressions of the informant due to the absence of a trained ethnographer on site</li> </ul>	<ul style="list-style-type: none"> <li>• The unconscious knee-jerk behaviour of customers while inside the store is not captured</li> <li>• Respondent video diaries should be used in conjunction with other in-store research techniques (such as accompanied or mystery shopping)</li> <li>• The MRS Code of Conduct provides guidelines for the recording of interviews (see rules A1, B8, B9, B34, B35 and B42). Some things to consider are:                         <ul style="list-style-type: none"> <li>– the anonymity of the informant must be preserved unless consent is given</li> <li>– data must only be used for the purposes for which they were collected</li> <li>– for additional information on the Code of Conduct see: <a href="http://www.mrs.org.uk/standards/codeconduct.htm">http://www.mrs.org.uk/standards/codeconduct.htm</a></li> </ul> </li> </ul>

(continued)

**Table 1** Practitioner's toolkit: methods of ethnography (continued)

Method	Benefit	Limitation	Implication
Interviewing sales personnel	<ul style="list-style-type: none"> <li>• Reducing intrusiveness into the customer's in-store activities</li> <li>• Assists triangulation of observations</li> <li>• Researcher can glean additional information from staff</li> </ul>	<ul style="list-style-type: none"> <li>• Even staff can get it wrong</li> <li>• Staff may tell you what they think you want to hear</li> <li>• Staff can become suspicious about a perceived 'interrogation', which can change the way they interact with customers</li> </ul>	<ul style="list-style-type: none"> <li>• Researchers will have to decide whether or not it is appropriate to discuss customer interactions with retail staff</li> <li>• Suspicion can be overcome by:                             <ul style="list-style-type: none"> <li>– introducing yourself at staff meetings (although not all staff members may be in attendance)</li> <li>– openly approaching staff when you arrive on site</li> <li>– telling staff who you are and what you are doing</li> <li>– reassuring staff that you are focusing only on customer activity</li> </ul> </li> <li>– making it clear to managers that you will not be reporting information about staff activities</li> <li>– being diplomatic when employers ask about their staff</li> </ul>
Mystery shopping	<ul style="list-style-type: none"> <li>• Overcomes the observer effect: people behaving unnaturally due to being watched</li> <li>• Covert observation provides optimum levels of authentic behaviour</li> <li>• Researchers have the ability to interact with customers while they are engaged with experiential activities</li> <li>• Adds a deeper sense of realism as the researcher experiences the customer's true reactions first hand</li> <li>• CCTV assists with recollection and post-fieldwork recollection</li> </ul>	<ul style="list-style-type: none"> <li>• Draws serious criticism for pushing ethical boundaries</li> <li>• The researcher is invading the privacy of the shopper</li> <li>• The researcher's true intentions are not disclosed</li> <li>• Deception leads to concerns regarding the rights of respondents</li> </ul>	<ul style="list-style-type: none"> <li>• There may be instances where covert techniques can be used ethically, e.g. Stafford and Stafford (1993, p. 68).                             <ul style="list-style-type: none"> <li>– Clause 1: the type of information sought must be of overriding public importance</li> <li>– Clause 2: there is no reasonable likelihood that conventional techniques would not obtain comparably accurate and reliable information</li> <li>– Clause 3: deception must not place innocent people at serious risk</li> </ul> </li> <li>• The MRS Code of Conduct also provides rules for the use of CCTV observational research:                             <ul style="list-style-type: none"> <li>– clear and legible signs must be used in surveillance areas</li> <li>– cameras must be sited so that they monitor the areas intended for surveillance</li> <li>– signs must state the individual/organisation responsible for the surveillance, including contact information and the purpose of the observation</li> </ul> </li> </ul>

With consideration of Table 1, it can be seen that each method provides distinct strengths and weakness that researchers will need to manage in order to reach the consumer's authentic behaviour. By using a collective mix of methods (similar to those outlined in Table 1), it is possible to contrast different perspectives and reduce the subjectivity of the ethnographic data. For instance, accompanied shopping allows researchers to follow customers on their retail journey (from home to store), visiting stores and asking the shopper questions as they sort through products and move across various retail outlets. However, participant data may not be sufficient in itself, as the informant may behave unnaturally due to the influence of the researcher's presence (see Table 1 for a list of benefits, limitations and implications).

To overcome this issue, video diaries help informants record their own opinions, feelings and reflections on what they encountered in a less obtrusive state. Recordings generally take place inside the home of the informant after they have conducted their in-store trip and without the researcher, providing the informant time to recount what they found significant about the experiential design. Video diaries are generally longitudinal and recorded over many days or weeks at allocated times (i.e. 10–30 minutes' recording at home after every store visit). This allows the researcher to see how the informant's opinions change over time, while identifying the themes and patterns repeated throughout the dialogue. To help illustrate the relevance of informant video diaries, consider the following example (Peile 2003):

When the videos are analysed we have found them to be made as if the respondents were featuring in their own docu-soap. For example, we have had the opportunity to watch sibling relationships in action. One sibling usually interviews the other, creating a more relaxed and open environment and encouraging the interviewee to reveal more in response to the personal questioning than he or she might otherwise do. In one instance, two sisters chatting about who is 'cool' led to some interesting insights into the way teenage girls view each other in terms of both appearance and personality. They discussed their peer group, analysing what kind of hair they had and what clothes they wore.

The ability of informants to complete recordings in the comfort of their own home allows them to talk freely about their experiences (by themselves or with other people). As seen from the above example, it also gives them time to play with the technology, and in the context of the two girls, make a game of the recording. As such, it is a very expressive and personal aid for reflection. It also gives researchers an opportunity to look

into the considered narratives that consumers provide when they are actively thinking about past events. In addition, informants are not distracted or misled by prompts from the researcher, therefore the discussions are less likely to be tainted by the researcher's agenda (see Table 1 for a list of benefits, limitations and implications).

Interviewing sales personnel can be a very useful supplement for triangulating on-site customer interactions and dialogue with staff. For example, in a recent ethnography conducted with an experiential retailer of ski equipment, we found that talking with staff assisted in understanding the consumer culture associated with the product. Ski users have their own style of language, dress and manner of behaviour, which helps brand communities to identify authentic participants and build trust between other customers and staff. We found it important to learn the language that staff would use during their interactions with customers in order to assist our own efforts of building rapport and studying consumer behaviour. To this end, we would frequently talk to staff about conversations we heard them having with customers. This allowed us to gain an insight into the topics customers (and staff) enjoyed discussing; for example, 'centring' the distance the skier needs to be positioned from the middle of the ski in order to enact specific aerial jumps, gaining/reducing slope speed, and the rate of turn; how 'catching some air' occurs when the skier (or snowboarder) lifts off into the air after hitting a jump; learning that the 'basket' is the small disc or cup at the end of the ski pole that prevents it from slipping; 'bonk' bouncing of a hard object; and 'goofy foot', meaning the snowboarder rides with their right foot forward on the board.

Be aware, however, that interacting with staff may also disturb the natural operations of the environment. With the example of our ski retailer, staff became concerned that the researchers might report their work performance to managers – a subject we frequently assured staff we would not discuss with employers. In addition, we found some staff became slightly more forceful with their sales technique, as they desperately tried to turn every interaction into a sale. It became clear that in order to maintain the trust of staff, and restore the natural operations of the store, it was deemed necessary to focus only on customers (see Table 1 for ways of overcoming staff concerns).

Of final interest is mystery shopping. Here, researchers play the role of customer and covertly watch other customers interact with the store. Traditionally, mystery shopping is used for watching staff behaviour and reporting on their service quality (Desai 2002). However, in the case of

studying consumers in the experiential environment, this same technique can be used to study customer behaviour in an unobtrusive fashion. Teams of mystery shoppers can also be employed and located across different quadrants of the store (Underhill 1999). This allows research teams to covertly track customer behaviour without drawing attention to the activity. (Table 1 discusses the benefits, limitations and implications of mystery shopping.)

### **Thinking ethnographically: analysis and interpretation**

In addition to doing ethnographic fieldwork it is important to understand how to analyse and interpret the wealth of data generated. As highlighted by Roberts (2005), a great deal of ethnographic literature frequently skims over the sense-making and interpretation stages, an important skill that clients pay researchers to complete. As Roberts (2005) states, the ‘post-fieldwork-fieldwork’ is important, and ‘to focus so strongly on the fieldwork seems to me to reveal the dynamics of the market research industry itself: namely “fetishise” the method, commodify it and then sell it by the unit. Ethnography offers the opportunity to sell thinking not [just] research.’ The question of ‘learning how to think like an ethnographer’ is a pertinent one. As such, it is necessary to at least clarify what goes on during the analysis and interpretation stages of ethnographic research. Consider the following practitioner account of analysis and interpretation for qualitative research:

If you are listening to a group discussion or an interview properly you are all the time switching between hearing detail, and forming global schemes and belief systems into which the details fit. You are then, perhaps, testing to the resultant discussion. This process of fitting details to the whole, and then modifying the whole to accommodate the details, and then listening for more details, and so on round and round is called the hermeneutic cycle. When the circle becomes stable, that is when new details can be accommodated by your belief system, without changing it, even though you go on testing for a while by considering more detail, then you are said to have ‘closed’ the hermeneutic circle by understanding the situation and your understanding is valid (Gabriel, 1990, p. 514).

A common theme with analysis and interpretation is that it is iterative and occurring as soon as the researcher begins data collection, right up until the point of saturation. Immediate impressions and interpretation is a reality, however within the retail setting it may not always be enough to complete this process ‘on the fly’ while inside the store. As Ereaut (2002) highlights, revisiting your field notes, interview transcripts/recordings,

pictures, video footage, and even the location of interest, helps to overcome potential limitations, such as: loss of material/data through absent memory or researcher fatigue; loss of immersion and incubation from being away from the context for too long; and loss of the opportunity to share learning and revelations with informants, retail staff and co-researchers. The reality is that the analysis and interpretation process requires immersion with the various collections of data in order to interpret, synthesise and gain understanding of the holistic situation. Quite literally, the researcher collects volumes of data, spends time packing and unpacking their substance, before finally fermenting it until it becomes a palatable recipe of managerial insight and usefulness (usually in a model or framework).

To help illustrate this process, Table 2 has been developed based on Spiggle's (1994) and Ereaut's (2002) discussion, and our own experiences of analysis and interpretation. The following categories of analytical behaviour (defining scope; data dumping; reiteration; classification, reallocation and association; building, breaking and decentralisation; bridging; lateral clarity; and metaphors and abstraction) are considered in the light of data collection techniques we use in experiential retail settings.

### **Ensuring objectivity: maintaining the quality of ethnographic data**

One of the main concerns regarding interpretation and analysis is that the researcher cannot completely separate their own subjective influences and interpretations from impacting upon objective understanding of what they are seeing or hearing from customers (Stafford & Stafford 1993). With ethnography, the researcher is very much a part of the data collection and analysis stages. Their lived experiences, feelings and insights, gathered through expert knowledge, make it very difficult to separate their own judgements from the creation of reportable information for managers (Ereaut 2002). The key question researchers and managers will face is how to evaluate the quality of inferences and conclusions derived from ethnographic research. Without objectivity, managers would only be able to rely on the authority of the researcher (Stafford & Stafford 1993). Immediately, the danger of this can be seen and checks need to be set in place to help minimise bias and improve the trustworthiness of the data.

Ereaut (2002) attempts to look at current theories on quality measures for qualitative output and suggests that the following ideas may be useful for market researchers. These ideas are based on Spiggle's (1994) discussion of improving usefulness.

**Table 2** Packing and unpacking: methods of analysis and interpretation

<b>Stage</b>	<b>What is it?</b>	<b>Benefit</b>	<b>Activities</b>
Defining scope	Researchers determine and manage the appropriateness of information generated from the data, while paring back irrelevant material	This will help the reporting stage where clear action points need to be articulated. Determining the type of information reported will also need to be clarified at this stage	Client goals are set and revised to assess the relevance of information for marketing objectives
Data dumping	The ongoing process of collecting, archiving and assessment of raw data	File may be prepared for use with qualitative analysis software: Nvivo/N7, ATLAS.ti, HyperRESEARCH, MAXqda and The Ethnograph to ease data management	The raw material (data) is archived into transcripts, video catalogues, photo albums (digital or hard copy), journals (for field notes), and are dated and labelled for easy identification
Reiteration	Researchers continue to immerse themselves in the retail outlet and contextual data, looking for new insight	Reiteration stimulates memories of what took place during the research, including emotional reactions towards experiential events	The researcher revises field notes, videos, audio recordings and transcripts. Working reiteratively helps researchers identify missed facts about the retail store, consumer behaviour and conversations
Classification, (re)allocation and association	Themes emerge from the data as 'chunks' of raw observations, dialogues and holistic attributes, which are grouped and sorted to form small segments/clusters of minor meaning	The raw clusters are representative of authentic instances and examples of in-store phenomena. This provides the researcher with a primary exploration of the data, helping the researcher to explore and become familiar with what is going on. This is critical for absorbing and reimmersing the researcher into contextual activities	Clusters are sorted (using pen and paper, spreadsheets, Word files or analytical software) and are represented/linked with: specific research questions, objectives, brand attributes, customer behaviour, locations within the store, topics of interest, physical attributes of the store, people representative of a particular instance, topics expressed by informants, unexpected insights, tangent thoughts and curiosities, theoretical and managerial concepts

(continued)

**Table 2** Packing and unpacking: methods of analysis and interpretation (continued)

Stage	What is it?	Benefit	Activities
Building, breaking and decentralisation	Here the packing and unpacking increases as researchers 'rummage' through the data and begin to craft out key ideas, themes and insights	Researchers can explore associations between categories and look at how the individual parts fit into the whole, while identifying contrasting behaviours, i.e. customers reacting in an opposite manner to the same event	Themes are unpacked into smaller subsets (age, gender, product categories, events, etc.) that allow for additional contrast and linking with deeper events
Bridging	The researcher looks and establishes links within the data: across categories and subsets	This allows the researcher to identify similarities, differences and patterns within the data	Larger themes are contrasted against smaller subsets so that behaviours, responses and meanings can be compared by subsamples within topic headings
Lateral clarity	The researcher spends 'hands-on' time building familiarity with the data	Researchers gain an intimate level of knowledge about what is occurring after 'playing' with the data for an extended period of time, back and forth with great repetition	Emerging interpretations are now shared and discussed between researchers in order to assess the quality of reasoning. However, collaborative discussion should not be used as a substitute for good analysis (Ereaut 2002)
Metaphors and abstraction	The researcher acts as interpreter based on their intimate level of knowledge of themes and subcategories of the data	Metaphors are freed of the burden of excessive detail and express a higher level of meaning applicable to the topic of interest. This allows researchers to convey issues and meanings in a more palatable form, which can easily be interpreted by those less familiar with the intricacies of the data	Here they translate data into more generalised concepts; an example of this would include Newton's law of gravity, 'what goes up must come down'

### *Innovation*

Researchers use new and creative techniques for looking at phenomena. Ethnographic studies of retail environments can achieve this objective by using a combination of the research techniques previously discussed (see Table 1). Multiple perspectives will help triangulate results and improve judgements related to the truthfulness of data.

### *Integration*

Researchers need to go beyond reportage – that is, merely stating the number of common patterns in the data – during analysis and interpretation. Insight and understanding requires a ‘hands-on’ look at the data from different angles. Ereat (2002) suggests that practitioners can achieve this by employing the concept of the ‘hermeneutic circle’. This technique, as mentioned earlier, involves the researcher moving back and forth through the data, studying parts in relation to the whole and the whole in relation to parts, while making comparisons between abstract meaning and hard facts (Kincheloe & McLaren 2000). Ethnographers will achieve integration by creating and linking together the details and narratives produced: from within the store environment; during shopper transitions between contexts (home and store); and from abstract ideas, conceptualisations and models generated from applied theory. This will provide a robust interpretation of the data, with insight into customer behaviours.

### *Resonance*

How enlightening is the work to the phenomenon and needs of the research (Ereat 2002)? Does it resonate with what researchers and managers are trying to accomplish? Is it evocative and insightful to understanding the behaviours and perspectives of the shopper and why consumers do what they do? Is it sensitising to our understanding? Does the insight provided really help researchers and managers to become aware of the underlying issues of the consumer and their relationship with the experiential environment and retail brand?

### *Adequacy*

To what extent can we ‘trust’ that the inferences made are grounded in the data of the research? Interpretations of the same text can be numerous, so

how can researchers identify which ones have greater evidence in order to make claims? Trustworthiness of the data can be determined by assessing the credibility, transferability, dependability and confirmability of the data (Lincoln & Guba 1985). As discussed by Ereaut (2002), adequacy and confirmability (in a practitioner's context) concern themselves with the processes that have been used to create the inferences, which have gone into drawing conclusions. Researchers must therefore make a 'paper trail' of the processes they used to derive meaning from the data; that is, how did the researchers go about thinking *ethnographically*? In addition, 'transferability', 'credibility' and 'dependability' help researchers determine how well conclusions provide value – in that they actually represent what is really happening within the experiential environment. For instance, can the findings be *transferred* to another setting? Can the findings be benchmarked so that it is possible to verify their truth (i.e. reporting findings back to informants to *confirm* specific details, or make alteration due to misinterpretations or mixed meanings)? Can researchers *depend* on finding the same outcomes if the study was repeated within the same or similar context and with the same or similar individuals? This can be achieved by creating a consistent experiential design for researchers. An example of consistent design within the experiential setting would be global retailer Games Workshop (<http://www.games-workshop.com/>), which provides a 'third place' for customers to interact with products and 'Warhammer' enthusiasts. By creating a layout that is near identical across its retail chain, Games Workshop evokes consistent experiential behaviour from its customers. A consistent research environment that can be rolled out across locations will improve the dependability of findings.

### **Providing managerial insight: reporting key findings**

Consideration of managerial needs is critical when providing deliverables, information and key findings to clients (Lillis 2002). While some managers may prefer detailed description and narrative for their own assessment, many require quick, easy and short accounts of what is going on. Insights detailing examples of key customer behaviour may be useful, highlighting where and how these instances occur, along with action points, which quickly state implications and recommendations. These points of consideration should always relate back to client objectives and priorities (Imms & Ereaut 2002). However, the format this information takes can include anything from reports, keynote presentations, discussion groups or even an environmental walkthrough (informally walking managers

through the retail store while discussing layout, effectiveness of in-store cues, customer movement patterns, hot and cold zones, physical limitations, effective attributes, etc.). Regardless of what format is taken, a management summary is usually provided as a supplement (although it should be written as a self-contained report), which consists of 10–20 pages of documentation. Considering how important it is to report the right information, in addition to analysing and interpreting it, a managerial summary guide is provided in the example below.

### **Example management summary guide – reporting key findings**

#### *Executive summary*

The executive summary states key issues, such as how the store’s design reinforced the brand’s positioning, customer interaction with staff, product categories and marketing messages (i.e. interactive displays), how the existing (or proposed) experiential strategy best fits with the brand’s values and objectives of the retail outlet, and if the store possesses untapped experiential capabilities. This section should also outline the recommendations discussed within the short report. For example, the extent to which the experiential strategy creates a packaged lifestyle solution, ease of use, levels of engagement, socialisation within the store, and assisting with the activities of the firm.

#### *Introduction*

The introduction briefly states why the research was conducted and what/who is the focus of analysis. For example, experiential strategies (and capabilities) might be assessed to help with repositioning strategies within markets that are highly competitive, or to assist with creating intangible competencies that are not easily replicated by competitors, and may lead to a sustainable competitive advantage.

#### *Key issues and implications*

This section would include what was found from the research and how this affects the retailer; that is, what does this mean for the client? This

might include discussions of how the store communicates the brand, how the store's design generates consistency between marketing activities and overall use of integrated marketing communications, whether or not the design 'fits' the public's perceptions of the brand and fits with client goals. Tactical issues may also be addressed, such as how the retail store actually creates its experience, its type of retail experience (or types, as stores can flow between different categories of experience, such as aesthetic, entertainment, educational and escapist), and how the various store elements come together (or do not come together) to create a holistic experience and engage the customer.

### *Action plan*

The final section of the summary provides a list of points that clarify what managers can do to capitalise on opportunities derived from the key issues raised from the research. For retail experience strategies, actions might cover how to: create a total lifestyle solution for customers using experiential design strategies; improve the usability of the store; advance staff and communal relationships; evoke fun and enjoyment from the brand; reposition the brand; create a memorable brand experience; determine the types of promotions and communication necessary to create consistency around the brand; differentiate the brand through the use of in-store conditions and levels of customer engagement.

## **Conclusion**

Employing ethnography within the experiential retail setting gives rise to a dynamic way for researchers to understand the customer within the holistic context. If researchers and managers are to gain the most out of the experiential environment, and develop experiential competencies, they are required to look beyond the questioning level. It can be seen that traditional qualitative techniques, such as focus groups and interviews, are comparatively limited within the experiential environment, in that they cannot truly capture the informant's natural behaviour – words are not the entire story. Leaving experiential research at the questioning level can lead to inaccurate findings, predominantly due to a lack of comparison against what consumers actually do inside the store. For this reason it is important

to assess the degree of mismatch between what informants say and what they do. For managers the implications are significant. Retailers cannot truly assess, establish or improve their experiential position unless they identify what customers actually do inside the authentic context.

The retail experience immerses consumers at a cognitive, emotional and intuitive level. However, the significance and practical benefits of this 'emotional labyrinth' will be missed if future research avoids entering the authentic context to study customer behaviour hands-on with a bricolage of techniques. It is necessary to utilise the scope and depth that ethnography provides (the ability to move across lifestyle contexts) if we are to successfully move the concept beyond mere myth. Ethnography has the ability to capture the dynamic interaction between customer flow and the static/dynamic elements of the experience encounter. These elements work in conjunction as a holistic mechanism and should therefore be studied under similar conditions.

There is benefit to adopting ethnographic techniques, as shown with the example of our paint store focus groups. Compared against our ethnographic findings of what customers did (as opposed to what they told us), it became clear that informants do not always say what they mean. When it comes to determining the level of interaction and immersion that customers expect from the experiential offering, ethnography is the most plausible tool for assessing context-dependent capabilities. Using the right mix of ethnographic tools – such as the collaborative partnership of accompanied shopping, the reflective recollections of informant video diaries, the mining of cultural information through interviews with sales personnel, and the unobtrusive interaction of mystery shopping – can assist researchers in reaching a robust and holistic perspective, which is necessary for making informed managerial decisions.

However, it is not enough simply to collect data. Researchers need to learn how to 'think ethnographically'. As discussed, researchers make natural assessments on the spot. However, it is important to move the analysis and interpretation process a little further to gain richer insights into the 'why', 'what' and 'how' of things. For this reason the paper outlines nine key analytical and interpretative stages to assist researchers in coming to grips with the burden of managing a wealth of data – that is, defining scope; data dumping; reiteration; classification, (re)allocation and association; building, breaking and decentralisation; bridging; lateral clarity; and metaphors and abstraction.

To round off the discussion, this paper acknowledges that ethnography can produce excessively detailed findings. However, if researchers are to

convey the importance of their work they need to provide it in a manner that is accessible to management (quick, direct and relevant). For this reason it is important that researchers keep their clients' needs in mind when crafting their deliverables. To assist with this process, an exhibit is provided for developing a management summary from an experiential retail perspective.

These suggestions and strategies will assist researchers with the challenges provided by ethnographic research. To reiterate, the retail experience is dynamic. For this reason, researchers should build their toolkit to incorporate a mixture of ethnographic techniques that look across the sweep of contexts available to them. This will ensure they capture the true meaning of their client's store while minimising misinterpretation of customer behaviour. Metaphorically speaking, if we are to truly understand our experience-seeking customer we should make the effort to meet them on their own terms.

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