Ethnographic Marketing: A Critical Appraisal Of The Use Of Anthropology In Marketing Research

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ABSTRACT

The purpose of this paper is to discuss, critically, the use of ethnography in marketing research. This discussion will be carried on from the starting point of a consumer research project, referred from now on as TH, developed by a multinational enterprise that operates in the Brazilian market. The conclusions reached here are relevant to different perspectives. From the theoretical point of view, it lays ground for an interesting discussion regarding the use of a structural theory of meaning in analyzing values and lifestyle data in the context of marketing research. From the methodological point of view, it presents a critical appraisal regarding the use of ethnography as a marketing research tool that can be useful in the future training of researchers. From the business point of view, the critical appraisal presented here calls attention for the financials consequences of the use of ethnography - a time consuming and expensive tool - just for fashion or in a short cut manner. Finally, but no less important, the discussions raised here can add some food for thought regarding relations between anthropology and business administration. The different cultures of both academic fields turn difficult some exchange of knowledge and methodology (Barbosa, 1999) that would be extremely valuable for the two sides.

Consumer Research

Since 1980 marketing research has been undergoing a considerably change from the methodological point of view, that can be summarized as a move away from predominantly quantitative and dry aggregate data to a qualitative and more particularistic one (Belk, 1997). This change is based in the growing evidence of the limits of economic approach in explaining consumption and consumer behavior in an each day more complex and interconnected world.

The two traditional views of consumer entertained by economists and marketing professionals - as a rational, independent, self motivated and free choicer subject or a passive and manipulated person - and of consumption as basically the act of buying (Belk, 1995; Campbell, 1995) has been undergoing a considerable change. In this new perspective the consumer appears as a subject immersed in different social and cultural networks and consumption as a process that begins before the act of buying and goes on far ahead after it. To perceive how consumption connects itself with other parts of human life and how a pre-existing cultural grammar interacts with individual choice in contemporary society is one of the main targets of this perspective (Shalins, 1979; Campbell, 1995; Belk, 1995; Mac Cracken, 1990).

It is needless to say that this new trend in marketing research is reflecting the changes that has occurred in recent contemporary society. These changes, generally referred to as post modernity, late modernity or postmodernism has been pointing out consumption as a process increasingly defined by cultural categories, like lifestyle and free choice of identity than for traditional sociological references like class, gender and age (Mac Cracken, 1990; Baudrillard, 1979, 1988; Featherstone, 1991; Slater, 1997). In this context the traditional
The anthropological method of field work and direct observation - ethnography - has become a major and important tool. The reason lies exactly in the type of data it produces and in the type of insights and understanding it offers of the so called “consumer” and of consumption.

The use of qualitative data is not new in marketing research as any history of consumer research can show (Winnick, 1969; Belk, 1995; Aaker et al., 2001). The novelty is the growing interest in ethnography, the traditional anthropological methodology, that consist of the process of observing, participating and interviewing the “native” in his own setting, trying to understand and to uncover the wholeness of his or her existence (Barros, 2001).

What supports this interest in ethnography is the awareness of the limits of the information produced by other kind of methodologies in explaining the different and changeable roles, function and meanings undergone by different products and services when they leave the stores in the hand of the consumers and enter his or her social and cultural world. So, we can now find marketing researchers watching a typical middle class family taking breakfast on sunday morning and trying to figure out what is the true role and meaning of margarine in their breakfast, in their meals and in their food system, how it is used, to which other product is combined and so on. And it is not surprising that they have been surprised by what they have been discovering. Like the anthropologists they are starting to listen, to watch and linking what people say they do with what they really do and the meaning they attribute to what they do.

This awareness of the importance of understanding the logic and values attached to products by people, the new use they are put up to in the consumer’s daily routines, and how all this kind of information can be fit in the wholeness of people’s lives is the center of the relations between marketing and anthropology. Although ethnography has becoming more popular as a tool for marketing research it has not always been used within the boundaries and specifications required by the anthropologists (Sherry, 1995; Walsh, 2001; Buia, 2001; Barbosa, 2001; Peixoto, 2001). Our argument should not be interpreted as a suggestion that only professional anthropologists are capable of doing good ethnography. Any methodology can be used by any researchers, as far as they become aware of the methodological and theoretical implications involved. Although, field work ethnography is a qualitative methodology, it is not equal to other qualitative methodologies. In order to give the output it has possibility of yielding, ethnography requires the knowledge of certain theoretical and methodological presuppositions. It is about them that we would like to make our critical appraisal in the context of the empirical marketing research referred to in the introduction, the TH Project.

The TH Project

The TH project was born with the purpose of being a new conception in marketing research within a multinational company. It intended to get to know the consumer as a “person” in his/her own social environment, going far beyond the traditional marketing techniques. To understand the consumer as a “person”, in the sense implied by the director manager of the project, meant “to get to know its set of values, desires and expectations”. The business aim of the project was to find out new ways of satisfying the consumer through better and less expensive products.
In order to pursue these aims a task force of around 10 people was created, formed by several marketing managers, sales man, and outside researchers from an international qualitative research company. They left São Paulo, in the South of the country where the company headquarters are located, in the direction to the Northeast, where the research was going to take place among the economic underprivileged population of Brazilian society.

The choice of the Brazilian Northeast as the place for the fieldwork and of its low income population as the research target was not an arbitrary one. Such a project was and can still be linked to a growing interest from transnational companies in general to understand the Brazilian Northeast consumption pattern of hygienic and beauty products. The reason is widely known in the business circles. Comparatively to other societies, Brazilians, in general, spend more, proportionally, on hygienic products than the equivalent social segments in other societies. What follows is that not only this multinational company has interest in the Brazilian Northeast, but almost all the big enterprises that operate in the market of hygienic and beauty products, like Procter and Gamble, Johnson and Johnson, Unilever, Avon and L’Oréal.

The choice of the low income class as the research target was also linked to a “puzzle” posed by the Northeast local market. It combines low income with high rates of consumption of one of the leading brands of powder soap of the Brazilian market, from now on referred as M. This consumption pattern goes against all the traditional economic rationality that presupposes that the low income classes will consume products with the lowest price. So, besides the broad interest in “knowing the consumer as a person”, there was also this specific aim of understanding the pattern of consumption of the powder soap M among the lowest class.

The “field work” lasted about three weeks and covered almost the whole Northeast. The task force went up driving from Salvador (Bahia) to São Luiz (Maranhão), visiting small towns and big capitals along the way. In all those places they interviewed, photographed and filmed what they considered to be “poor” women in their daily tasks, accompanying them to the places where they used to wash their clothes, be it the rivers banks or the backyard of their homes; watching them getting the house cleaning done in the “palaftitas” of Salvador; and also trying to capture their lifestyle, examining the interior of their houses, their bathroom cabinets, their shopping habits in the slums of Recife. They also tested these women conception of what they consider to be a good soap.

**Ethnography and Marketing Research**

In order to grasp the importance of ethnography as a tool for marketing research it is interesting to try to answer what is ethnography, why anthropologists make use of field work and direct observation, which type of information it produces and what is its applicability for marketing and business in general?

Social reality has a double nature. One that is composed by the material world around us and the other by the symbolic means through which human beings make sense of this material world. People, objects, relationships, facts that are part of the everyday life and of the material world around us only have their existence considered as part of our reality when they are inserted within a system of values and meanings. Values and meanings that can not be determined from the physical and biological properties of people, objects, relationships,
products and facts but are attributed to them by the classificatory/symbolic structure of the human mind (Shalins, 1979; Mac Cracken, 1990). Anthropologists make use of field work and direct observation because this methodology helps them to capture the different logical and meaningful ways through which people organize “reality”. For instance, by observing the washing clothes practices of a group of women, the food habits of another or the socialization process of a third one it is possible to understand “what goes without saying”. We can gather from this, that the true meaning of “listening” to the consumer should be to get to know the logic underlying his/her social practices, the meaning he/she attribute to them and to the material world around him/her and his/her reason for certain choices and patterns of consumption.

When direct observation is coupled with deep field work interviewing, as usually is, the visual information is enriched with the own native point of view about his/hers own practice, values and meanings and of the social group he/she belongs. These give the anthropologists the opportunity to look at the reality of one specific group or society through its own categories avoiding the pitfall of ethnocentrism.

So, one of the basic steps in field work is to try to determine the main categories that are used by one group of people to classify the social world around it, the different types of people and relationships among them, the material world in which they live in and their relationships with objects and products. Then, any field work and direct observation must start with the researchers avoiding any kind of a priori classification about the group, otherwise the anthropologist would be investigating his/hers own thinking about the world and not his/her “natives” thinking about their world. So, “consumer insight” can be seen as the structural equivalent of the anthropologist “native categories”. This means the logical classifications used by consumer to organize his/her world and everyday life experience.

This mapping work is called ethnography and a good ethnography or dense ethnography in the sense used by Geertz (1979) implies not only the crude description of the symbolic categories used but also their social context, the actors involved and the symbolic dispute around them. This means that the realm of culture is not a monolithic and homogeneous one. Far from it, it is a polisemic and polyphonic world.

Other methodological requirements are also needed, mainly when we are working within our own society, where everything seems so familiar to us. However, to be familiar with “something” doesn’t mean to know “something”. So, an attitude of distance and of strangeness must be adopted in order to transform the familiar fact and element of everyday life in an “exotic” one (DaMatta, 1978; Velho, 1978). To strange something means to look with new eyes, to pose “why” questions for things taken for granted, to search the logic and the meaning behind the automatic procedure, to look to familiar things as they belonged to an undiscovered civilization (Buia, 2001).

So, in order to avoid the pitfalls of ethnocentrism and of confusing the familiar with the known, the researchers must be aware of why ethnography is being used, what kind of data it yields and how he/she will interpret it. And in the specific case of a business enterprise how all this kind of social/cultural knowledge can be related to marketing and consumption and turn into information for the perception of new market opportunities, new products and new ways of getting in touch with the consumer.
During our analysis of the data of the TH project we could feel, listening to the tapes, the lack of knowledge of the researchers’ group about these basic theoretical and methodological principles of a good ethnography and its possibilities for marketing research. One of the best example was the ethnocentric imposition of the researchers’ own classification about the group – “poor”- upon it. Poverty is a relative and not an absolute concept. It depends on the context and it also can be defined in various manners. Although by economic standards the group of women interviewed is at the bottom of the Brazilian income ladder, they do not classify themselves as “poor”. However, for the research team, almost all of it belonging to the middle and upper middle class of the Brazilian South region, with almost no experience with material deprivation in its worst form, ”poverty” was for it the overwhelmingly defining characteristic of the women investigated. As a consequence, during the analysis of the interviews was possible to perceive the struggle between the researchers own classification of the group and the women’s own perception about themselves. The group refused the classification of “poor” in every moment it was imposed upon it.

All the time that a researcher referred to a woman as “poor”, or turn explicit her material deprivation, she was able to point out to someone poorest than she. In one instance, an old woman, living in a shanty house in the slum of Brasilia Teimosa in Recife (PE), declared that “poor is the one who has no roof over his head, poor is the one who lives and sleeps in the bus station, she was not poor”. These women only referred themselves as poor or acknowledge their material deprivation explicitly when it could be coupled and compensated within a higher position in a social or moral system of classification: “I am poor but honest”, “I am poor but clean” or “I am poor but blessed by God”, “God never failed me”. Only in these situations they would defined themselves as “poor”.

Another instance of lack of methodological and field work skills could be felt in the anxiety demonstrated by the interviewers in finding out the voting preference of these women and their appraisal of the benefits of the economic plan adopted by the government that was under way. Part of the researcher’s anxiety was related to the opportunity for peering inside the Northeast women political values and also to the researchers own political preferences. It was obvious, for anyone acquainted with the Brazilian political culture, that the interviewers were eager to check the chances of a specific presidential candidate and how much the Plano Real had damage the chances of his candidacy among the most material deprived segment of the Brazilian population. Very interesting field work situations arose from this eagerness that raise good questions about the “famous authority” of the interviewer (Marcus and Fischer, 1986). Contrary to what the post modernity discussions has brought about the interviewees, at least in this specific research, never yield to the researchers alleged power and where very conscious of their own position. A power struggle was perceived in several instances, sometimes by the interviewee themselves, although it went unnoticed by the researchers team all along.

In one circumstance an old woman, living in one of the poorest area of Recife, never yielded to the interviewer request of declaring her voting preference. She stated that the act of voting was a secret one. Facing with the researcher’s insistence, she tried to bypass him stating that she would vote in the candidate that had a “good heart”. The interviewer immediately replied: “who has a good heart”? Thinking, probably, that the woman, now, did not have a way out. That was not the case. The old lady answered back: “only God knows who has a good heart”.

How much these methodological pitfalls affected the collection of data? It is hard to say or to evaluate, but for sure the researcher team lost good opportunities for understanding basic
aspects of those women lives if they wanted to “understand the consumer as a person” as was initially intended. Some of the losses are obvious like, for instance, the difference between the researchers and the women’s conception of the meaning of material deprivation and the impact of it in each other lives. For the researchers the main criteria for classifying these women were their material poverty, but for them, what were the main criteria for classifying themselves and the researchers? If they refused the general label of “poor” and only accepted it in certain social contexts, how poverty was then interpreted? How material deprivation was understood and how did it affect their hierarchies of shopping and consumption?

Although these methodological pitfalls can be circle around with a more sociological preparation of research teams, we must be aware that they arose in the TH Project, and will go on arising in other field work experiences, as I have seen, because most of the qualitative researchers employed in the projects ignore the methodological presuppositions of anthropology and anthropological field work. It is not sufficient “to be there” and to observe “exotic” ways of living. This, by itself, does not yield the information that researchers are looking for. It is important to know why it is important to be there, why and what direct observation yields in terms of data, which is the nature of social reality and consequently why observing it directly can bring knowledge about patterns of consumption, their respective meaning and how they interact with other parts of the consumer life. Otherwise, the use of field work becomes only a good experience for marketing people, an adventure in the exotic but a poor one from the point of view of the business knowledge about consumption and consumers.

It is worth to mention that although ethnography is a qualitative methodology not all qualitative methodology and field work is ethnography. This means that marketing researchers trained in field interviewing have not the necessary training for direct observation and for the kind of deep field interviewing that ethnography and anthropology requires. This is not a plea for an anthropologists’ monopoly of certain types of marketing research. But it is clear a plea for a distinction between certain types of field observation and true ethnography and the technical requirements to apply it

These critical observations do not mean that the TH project was not well conducted and succeeded. The TH project was an innovative one within marketing research and established an important “culture” of listening to the consumer with new tools. From the commercial and marketing point of view it was a huge success. A factory was built on the Northeast region in order to produce a new soap brand designed according to the expectations of the local market and is sold at a lower price. Special packing was also developed to respond better to the women washing clothes conditions together with a special distribution system adapted for northeast local conditions.

Even then we do think that the TH Project could have yielded more. Not only in terms of data collection but also in terms of business knowledge regarding Brazilian consumption systems and consumer. The reason we say so is because marketing has been making using of research in a short term perspective instead of in a long and strategic one. If consumption is now understood as a social process that starts before the buying and last until the final discharge of the product or service, then research can not be focused only around one part of this whole process as was the case of the TH Project. It can start from anywhere of the process – washing practice, for instance is a good starting point. But it should not stop there.
Ethnography is a time consuming and very specialized field work tool. So, there is no point in not using everything it has to offer. From a business perspective, to stop in the middle of the way, it is a waste of money, time and opportunity. To understand the whole process of consumption should be part of the strategic thinking of any company. The reason lies in the fact that any new product, service, or marketing campaign will be interacting with a pre existing system and process of consumption. Any product or service will have to find a place and a meaning within this system and process. So, whoever knows them better will probably hold a competitive advantage in relation to whoever doesn’t, because he/she can, in advance, contemplate opportunities and sceneries that are open to speculation only from the mapping of the processes and systems of consumption.

It is our perspective that if marketing has anything to gain from using ethnography and adopting an anthropological analytical perspective, it is exactly by understanding how consumption interacts with other parts of the consumer life and experience as stated above. And, by the other side, if anthropology has anything to gain by peering in certain areas that it has set itself apart is exactly by trying to theorize over them.

**Ethnographic Marketing**

Although field work ethnographically inspired and data regarding values and lifestyle have been a new focus of interest in marketing research since the 1980 decade (Sherry, 1995; Barros; 2001), it is important to notice that, as Mac Cracken (1990) pointed out, we still lack the necessary theoretical tools to handle the nature and complexity of the value and lifestyle data. As a matter of fact much of the methodology and theory designed to study lifestyle, as for instance AIO (Attitudes, Interests and Opinions), has stood as a positive barrier to understanding the interrelated nature of lifestyle phenomena and value data. A hundred details on the respondent’s life and experience are registered but no theoretical tool has been developed that is able to link all these information in coherence whole. Partially, the solution for that lies in the employment of the structural theories of meaning as Mac Cracken suggests.

According to Mac Cracken (1990) one possible theory of meaning is the “Diderot effect”, that may be defined as “a force that encourages the individual to maintain a cultural consistency in his/her complement of consumer goods” (Mac Cracken, p.123). This author tells us that the Diderot effect operates in three different ways:

“it works to prevent an existing stock of consumer goods from giving entry to an object that carries cultural significance that is inconsistent with that of the whole; “it forces (the adoption) of an entirely new set of consumer goods”; and “it is deliberately manipulated, exploited by the individual to symbolic purpose.” (Mac Cracken, p.123-124)

From what was stated above we can imply that if there is a force that prevents, forces or manipulates the entrance of any object or product, it happens so because there is a pre existing system of meaning that defines the places of objects within a system of relationships, otherwise there would be no need for preventing, forcing or manipulating anything for any purpose.

This system of meaning gives a degree of cultural consistency among certain set of things and can be used to understand the interrelatedness of things in social wholes. The logical
Theoretical consequence is: no service, product, object or lifestyle is floating within a social and cultural vacuum. They are imbedded in the social tissue of the real world where they always have a place and meaning. They exist within mundane social structure and relations that they can affect but that can be also be affected by them. Second, objects only acquire their respective place, meanings and functions within a system of relationships. Third, social life is not a random experience. It is an ordered one. And it is precisely because it is so, that it is possible to make sense of other people’s way of living. Fourth, what we observe ethnographically regarding the position or meaning of any object, product, or service may acquire within a system of relationships

"is its ostensibly “natural” fit within a social order that we are intellectually committed to revealing as constructed and historical. This is the constant conundrum for anyone who studies material culture.” (Miller and Slater, 2000, p. 3)

The study of consumption is the study about the material culture of a society and how it fits within a certain lifestyle. It is irrelevant from where we start our investigation as far as in the end of our inquiry we know what is the place and meaning of the product or service we have been investigating in the consumer’s lifestyle and how it connects with other parts of his/her life.

In the TH project we ended up understanding the role and meaning of cleanliness in the social identity of a group of women and the different phases and logical structure behind their washing practices. Later on, as we went on pursuing the subject further, we were able to identified other aspects. One of them was the logical criteria and the system of values underlying the hygiene and household cleaning system of Brazilian society as a whole and their interrelatedness with other systems of consumption, like for instance, water and electricity. To apply the theoretical principles indicated above is to gain an ordered way of looking to consumption and consumer data. It is a methodology of inserting the product or service under investigation within systems of relationships, meanings and lifestyles instead of leaving them floating and unconnected to the social and cultural context to where they belong to.

If we unfold the theoretical principles of Ethnographic Marketing, in a step by step methodology, it is possible to gain a depth perception of our subject. The methodology requires that we start by looking to any single product, service or object as a unit within a metonymic series. Second, this metonymic series must be related to a system of consumption (for instance food, hygiene, entertainment, cultural and so on) in which each single item is embedded and from which it acquires its meaning. Third, the main categories of the system of consumption and how they relate to other systems must be identified, followed by the search of their respective cultural content and practices.

It was this theory of meaning and the step by step methodology described above that we used in our first analyses of the washing practices of Northeast women of the TH project and on our own field work data. In ethnographic terms the pattern of powder soap consumption that triggered initially the research integrated the metonymic series composed also by the bar soap, the washing machine and the washing by hand and etc. All of them were treated as units related to a system of consumption – hygiene and household cleaning - that was structured around the principle of pollution/disgust (Neves, 2001).
To adopt the perspective described above is to have a better tool to understand the process of change in consumption pattern due to innovation, to pattern of gratification or to pattern of distribution. In any of these cases the novelty that has been adopted or rejected, it was so in a cultural environment that keeps the social memory of the old pattern of consumption and meaning. If the novelty go against the old ways or reaffirm them, in all circumstances it will have “to dialogue” with what existed prior to it. Consequently, to have already mapped what existed before is half way in understanding the new tendencies and which new opportunities might arise.

Final Remarks

It is important to understand that the raw material of marketing is the material culture of a society, under the form of commercial goods and services. The main task of marketing is to transform the anonymous and impersonal world of commercial goods that inhabit the realm of production in the personalized and lively world of consumption. Marketing does so through essentially cultural processes, which the main one is the transference of meaning from the cultural constituted world to the material world, of objects and products. This transference of meaning is emphasized by the propaganda and later on ratified or not by the consumer (Mac Cracken, 1990).

As a consequence, marketing deals, all the time, with cultural processes. So, it is fundamental for professional marketing to be aware of not only which are these processes, but also which is the nature of social reality, how different products, objects and services are being understood and assimilated in different societies, by different group of people and how different universe of social possibilities have developed around the material world related to consumption. In the tradition of material culture analysis we must be as much concerned with how subjects are constituted within material worlds as with how they understand and employ the objects of the material world (Miller, 1987).

Anthropology, as indicated above, and ethnographic marketing as a tool for collecting and interpreting data can help marketing in this task. As we tried to demonstrate they help to unfold, to map and to related products and practices within system of meanings and then to perceive how these systems of meaning are related to pattern of consumption and lifestyles.
REFERENCES


