

# The case for qualitative research

Eileen Fischer<sup>1</sup>  | Gulay Taltekin Guzel<sup>2</sup>

<sup>1</sup>Schulich School of Business, York University, Toronto, Canada

<sup>2</sup>Freeman College of Management, Bucknell University, Lewisburg, PA, USA

## Correspondence

Eileen Fischer, Schulich School of Business, York University, M3J 1P3, Toronto, Canada.  
Email: [efischer@schulich.yorku.ca](mailto:efischer@schulich.yorku.ca)

## Abstract

This paper makes the case that there is considerable untapped potential for qualitative research to make theoretical contributions that will advance our collective insights on consumer psychology. The paper explains some features that distinguish qualitative research from other approaches and addresses some common misperceptions about it. It explains why qualitative research—which is geared toward theory development and refinement—can be such a useful tool in the kit of researchers seeking insights on consumer psychology. It then outlines a qualitative research process suitable for crafting conceptual contributions to consumer psychology and offers a set of criteria that are appropriate and inappropriate for adjudicating qualitative research of this kind. In all, we make the case that the conditions are in place for JCP to be a vibrant platform for publishing research based on qualitative methods.

## INTRODUCTION

The stated goal of the *Journal of Consumer Psychology* (hereafter JCP) is to “contribute both theoretically and empirically to our understanding of the psychology of consumer behavior”.<sup>1</sup>

To date, the vast majority of empirical research published in JCP to advance that goal has been based on findings obtained in either laboratory or field experiments. Curiously, since the journal's inception, it has published only a handful of empirical papers based on qualitative analyses of qualitative data (those that have appeared include Baker & Hill, 2013; Fitzpatrick et al., 2018; Klein et al., 2015; Iacobucci et al., 1995; McGrath et al., 1993; Sherry et al., 2004; Whitely et al., 2021). The paucity of qualitative research thus far published in JCP is striking not least because other journals that publish research on consumer psychology (most notably *Journal of Consumer Research*) frequently feature one

or more qualitative papers per issue. Moreover, qualitative research is often some of the most highly impactful based on rates of citation (e.g. Rapp & Hill, 2015; Wang et al., 2015).

Whatever the reasons that may lie behind the extremely limited number of qualitative research papers that have appeared in the pages of JCP, this article aims to further the extent to which such methods are used to make theoretical contributions that advance our collective insights on consumer psychology. To achieve this goal, this paper is organized as follows. First, we offer some definitions related to qualitative research, and address some common misperceptions. We then illustrate some distinct kinds of contributions that qualitative research can make to theoretical understandings of the psychology of consumer behavior. We also draw attention to further benefits for researchers of engaging in qualitative research. Next, we outline a qualitative research process suitable for advancing theories of consumer psychology, illustrating each step in the process through an extended example. We also suggest some criteria that are appropriate (and some that are inappropriate) for adjudicating

<sup>1</sup><https://onlinelibrary.wiley.com/page/journal/15327663/homepage/productinformation.html>.

qualitative research. Finally, we make the case that JCP should be in the consideration set of those deciding where to try to publish qualitative research.

Before embarking on this undertaking, we wish to make clear that this paper, designed as it is for a JCP methods dialogue, necessarily entails drawing some rather coarse classificatory distinctions between qualitative and quantitative research. We want to be clear, however, that just as there is no single quantitative research approach, there is no single qualitative research approach. Indeed, there are many distinct traditions of qualitative research that entail a diversity of theoretical and philosophical premises (Prasad, 2017). Although we outline one process for conducting qualitative research in this paper, we want to underscore that studies based on qualitative data and using methods classified as qualitative can entail very different kinds of analysis, depending on the research tradition in which the analyst is situated. Our goal here is to offer an option to those seeking guidance on using qualitative methods to develop or refine theories of consumer psychology, but we wish to avoid any implication that what we outline here is “the” qualitative research method, and to refrain from institutionalizing an over-simplified vision of the variety that characterizes qualitative research.

## DEFINITIONS OF QUALITATIVE RESEARCH

Having acknowledged that there are many distinct traditions of qualitative research, one thing that is common across all of them is the following: qualitative research is “any type of research that produces findings not arrived at by statistical procedures or other means of quantification” (Strauss & Corbin, 1998, pp. 10–11). This definition emphasizes the nature of the data analyzed in qualitative research, namely non-quantified data. This non-quantified data can be generated through such means as conducting long interviews (e.g., McCracken, 1988), engaging in observation or participant observation in real-world contexts (e.g., Spradley, 1980), undertaking observation and participation in online contexts (e.g., Kozinets, 2020), or using projective or auto-driving techniques (using photos or texts produced by informants to elicit information from them) (e.g. Heisley & Levy, 1991). Non-quantified data can also be gathered from “archival” sources such as texts (e.g., newspapers), images (e.g., photos on Instagram), audio recordings (e.g., podcasts), or objects (e.g., artworks) not originally created for the purpose of the study (Belk et al., 2013).

In contrast to definitions that anchor on data, other definitions of qualitative research emphasize the nature of the analyses of such data. For example, in a recent comprehensive review of definitions of qualitative research, Aspers and Corte (2019) highlight that

it is quintessentially an *iterative, abductive process that oscillates between gathering data, analyzing data, and generating theory*, in contrast to deductive quantitative research that entails testing pre-specified posited relationships (often in the form of hypotheses) on sets of data. Aspers and Corte (2019) further highlight that a defining feature of qualitative analysis is that it *entails the generation of new concepts and refinement of understandings of relationships among concepts through processes of comparing, contrasting, and categorizing*; as they note, in most quantitative research, concepts are defined a priori and do not emerge or become refined in the course of analysis.

Both definitions that focus on the types of data used and those that emphasize the processes of analysis entailed in qualitative research are useful for our purposes here. We also believe it is useful to clarify two issues that sometimes contribute to ambiguity regarding what constitutes qualitative research.

One definitional query that consumer researchers may raise is whether qualitative research is synonymous with the term “consumer culture theory” (aka CCT)? The answer, unambiguously, is “no.” Consumer culture theory refers to “a family of theoretical perspectives that address the dynamic relationships between consumer actions, the marketplace, and cultural meanings” (Arnould & Thompson, p.868). While scholars frequently use qualitative methods to contribute to consumer culture theory, many CCT researchers use quantitative methods as well (e.g., Arsel & Bean, 2013; Coskuner-Balli, 2020; Humphreys, 2010; Sirsi et al., 1996). Thus, what unites consumer culture theory research is its topical focus, not the methods used to develop insights. Moreover, there are many examples of qualitative research published in consumer and marketing research journals that most knowledgeable readers would probably not regard as contributions to consumer culture theory per se. Consider just a few examples: Kirmani and Campbell's (2004) use of qualitative methods to identify strategies consumers use to achieve their own goals when interacting with persuasion agents; Parasuraman et al.'s (1985) development of a conceptual model of service quality based on qualitative interviews with executives and focus groups with consumers; and Kohli and Jaworski's (1990) contributions to clarifying the nature, antecedents, and consequences of the market orientation construct through the analysis of interview data. As these examples suggest, qualitative research is useful for developing theories in a range of domains, and it should not be conflated with consumer culture theory.

Another question is whether qualitative research is synonymous with inductive research. The answer, again, is “no”: it is not synonymous with an inductive approach. However, there are some reasons why the reader might mistakenly assume that qualitative analyses rely on induction. For example, some scholars in other fields who offer guidance on doing qualitative

research explicitly refer to these methods as inductive. A notable, widely cited example is Gioia, Corley & Hamilton (2013). Typically, those who make such claims are proponents of a relatively narrow interpretation of what it means to develop “grounded theory” (Glaser & Strauss, 1967). Yet many (including Barney Glaser, the coauthor of *The Discovery of Grounded Theory*) eschew narrow interpretations that attempt to depict grounded theory building in particular, or qualitative research in general, as purely inductive (Walsh et al., 2015). Further, although qualitative research is not purely inductive, it does often rely on a mixture of inductive and abductive theorization (Belk & Sobh, 2019; Dolbec et al., 2021; Grodal et al., 2021).

## WHY USE QUALITATIVE APPROACHES TO ADVANCE CONSUMER PSYCHOLOGY?

Put simply, qualitative research can advance consumer psychology because this approach is conducive to theory building and theory refinement. More specifically, qualitative approaches can contribute in a range of specific ways (Otnes & Fischer 2006). The first can be thought of as “constructing” which refers to the identification of new constructs and the refinement of existing ones. A second is “relating” which refers to identifying relationships between constructs that had hitherto be neglected. A third is “redressing” which refers to identifying and ameliorating elisions or omissions in extant theory. In practice, more than one of these kinds of theoretical contributions may be observed in a single study.

Evidence of these kinds of contributions to consumer psychology that have been generated through qualitative research is not difficult to locate. Consider, for example, Muniz and O'Guinn's (2001) theory introducing the notion of “brand communities:” this is typical of a “constructing” type of contribution that introduces a new concept to the field. As second fine example is Fournier's (1998) elucidation of consumer-brand relationships; Fournier's research entails both (re)constructing a hitherto ambiguous concept, and “relating” in that it specifies consumer outcomes uniquely associated with certain types of consumer-brand relationships. A third outstanding example is Arnould and Price's (1993) exposition of extraordinary consumer experiences during extended service encounters: this paper illustrates a qualitative contribution that entails “constructing,” “relating,” and “redressing.” It (re)constructs the consumer experience construct by identifying and exploring the nature of extraordinary consumer experiences; it identifies relations between such experiences and consumer outcomes (satisfaction); and it “redresses” limitations of then-prevalent theory on the role of prior expectations on shaping customer satisfaction in service encounters. Each of these studies was based on qualitative research,

and each is in the top 25 most cited papers in the journal in which they were published (Wang et al., 2015).

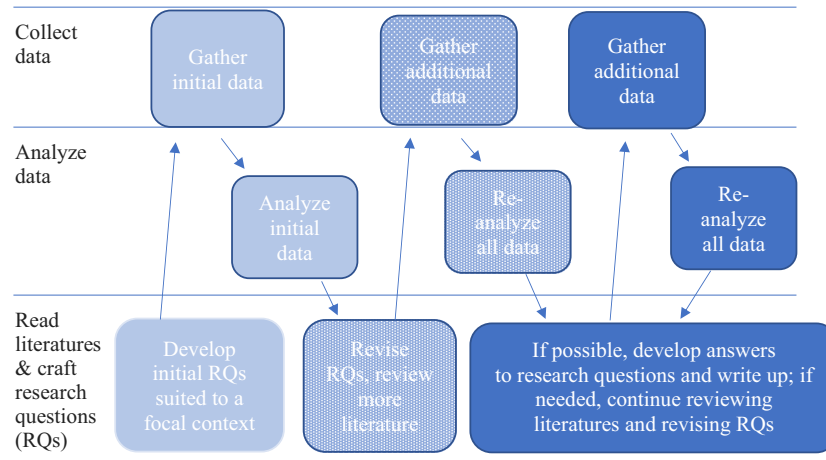
Readers may also find it useful to consider what kinds of theoretical contributions qualitative research can make using the distinction between “substantive” and “conceptual” contributions that was introduced by Lynch Jr et al. (2012). These authors argued that non-deductive consumer research is under-appreciated but highly valuable for making certain kinds of contributions, and while Lynch and colleagues did not explicitly consider qualitative approaches it is clearly the case that these approaches fit with their characterization of research in which “data precede rather than follow theory” (p. 479). Like other non-deductive research, qualitative research is useful for making either “substantive contributions” by contributing to the understanding of a substantive phenomenon (Lynch et al, p. 480), or “conceptual contributions” by building or expanding theory (Lynch et al, p. 479).

An example of qualitative research that was deliberately designed to make a substantive contribution can be found in Whitley et al. (2021). This mixed-methods paper developed theory relevant to the phenomenon of relational spending in the context of funerals; it relies on the analysis of depth interviews with those who have recently planned funerals to illuminate the “caring orientation” that informs consumer decision making specific to this context. It makes no attempt to extend this theoretical insight beyond the funeral spending context.

An example of qualitative research deliberately designed to make a context-spanning conceptual contribution can be found in Klein et al. (2015). These researchers make a conceptual contribution that extends theoretical explanations of gift giving. Based on their analysis of data collected from Holocaust survivors, they augment accounts of gift giving that explain it based on social exchange, economic exchange, or agapic love; their conceptual contribution results from their identification of identity-based motivations that are likely to be particularly acute in contexts where the gift giver has been subject to conditions that strip them of their identity. Thus, their theory is transferable beyond the context of Holocaust victims to other contexts where gift givers experience some degree of what the authors refer to as “identity-stripping.”

Qualitative researchers typically strive to make conceptual contributions of the type that span contexts rather than substantive contributions that are specific to a particular context. This may happen because reviewers tend to encourage more transferable conceptual contributions rather than highly context-specific substantive contributions. In principle, however, there is no reason those considering conducting qualitative research should confine themselves strictly to seeking to make conceptual contributions rather than substantive ones.

While it may be interesting in a general sense to know that publishing qualitative research can lead to making



Adapted from Harrison & Rouse (2014).

**FIGURE 1** A qualitative research process for crafting conceptual contributions

theoretical contributions to consumer psychology, however, most people who are not already familiar with conducting research of this kind might, at this point, be asking themselves why *they* should consider doing so. There are at least three reasons why people might want to consider it, even if they have not done so already. First, as Janiszewski and van Osselaer (2022) argue, qualitative research that combines induction with abduction allows scholars to do some things that purely deductive research with a theory-testing agenda does not: these opportunities include identifying new consumption phenomena worth studying, proposing the existence of hitherto neglected constructs, and proposing novel theory (vs. deriving hypotheses based on existing theory). If identifying neglected phenomena and constructs and generating novel theory is appealing to a researcher, then doing qualitative research will be attractive. Second, qualitative research can be highly useful in addressing important real-world problems; indeed, some have gone so far as to argue that it is the best kind of research to conduct if one wants to tackle “grand challenges” which have been defined as “highly significant yet potentially solvable [social] problems” (Eisenhardt et al., 2016). This may be part of the reason why a disproportionate percentage of highly cited (and often award-winning) papers in the field of consumer research, and in allied fields of study such as management, are based on qualitative research (Bansal & Corley, 2012; Rapp & Hill, 2015; Wang et al., 2015). If researchers are seeking to do research that has the potential to have real-world relevance and scholarly impact, then qualitative methods are worth considering. Third, conducting qualitative research can be a deeply engaging undertaking that affords the researcher an opportunity to become familiar with contexts and phenomena that are unfamiliar, fascinating, and not infrequently morally compelling. This makes research of this kind not only intellectually stimulating, but also emotionally moving and personally fulfilling. Though

such rewards are not, of course, unique to qualitative research, they are good reasons to consider taking up the challenge of mastering this research approach. The next section furnishes readers with some guidance in generating qualitative research that is both theoretically important and professionally enhancing.

## A QUALITATIVE RESEARCH PROCESS FOR CRAFTING CONCEPTUAL CONTRIBUTIONS

As noted earlier, there are many genres or traditions (Prasad, 2017) of qualitative research. For examples of some specific genres that have been very influential among consumer researchers, see Arnould & Wallendorf (1994's) characterization of ethnographic research; Arnold and Fischer's (1994) explanation of a hermeneutic approach; Kozinets' (2020) account of netnography; Mick's description of semiotics (1986); Murray and Ozanne's (1991) sketch of critical research; Ozanne and Saatcioglu (2008) review of participatory action research, and Thompson et al.'s (1989) treatise on existential phenomenology.

While acknowledging that there are significant differences across the many genres of qualitative research, however, we next outline a qualitative research process that we believe can serve as a useful starting point for researchers seeking to advance consumer psychology by making transferable conceptual contributions. Figure 1 provides an overview of this process for crafting conceptual contributions.

As the figure indicates, the process depicted is an iterative one that concludes only once plausible, insightful, and well-supported answers to theoretical questions have been developed. In the sections that follow, we explicate the stages outlined in the process, drawing illustrations from one particular example of a



qualitative research study: Fischer et al. (2007). This paper was selected because it is one with which the first author is deeply familiar, and because it represents an example of qualitative research that relates to a psychological consumer theory of the type relevant to JCP's mandate (specifically, a theory of consumers' goal pursuit).<sup>2</sup>

## Develop initial research question suited to a focal context

As Figure 1 indicates, a generic qualitative research process begins with the identification of initial research questions regarding some theoretical matter—usually construct(s)—of interest. These initial research questions need to be anchored in prior literature relevant to that theoretical matter; thus, reviewing scholarly literature is one pre-requisite to formulating an initial research question.

At the same time, the research questions must be suited to the “context” in which the researcher is thinking of collecting data. The term “context” refers to the specific empirical setting in which data will be gathered and qualitative researchers must be, or become, knowledgeable about the institutionalized practices and the understandings of consumers in the context they want to investigate in order to determine what theoretical matter(s) they could investigate by studying it (Arnould et al., 2006; Askegaard & Linnet, 2011). For a research question to be “suited” to investigation in a particular context, the theoretical matter of interest must, at a minimum, be readily apparent in the context. Moreover, that theoretical matter should figure significantly in what consumers think and/or do within the context. Ultimately, to make a novel theoretical contribution, the researcher must be able to glean insights from studying that empirical context that are revelatory of something previously unknown about the theoretical matter of interest (Eisenhardt & Graebner, 2007; Walton, 1992). However, determining the novelty of theoretical insights that investigation of a particular context can yield is typically not possible in advance of any data collection and analysis. This, in part, accounts for the iterative nature of qualitative research processes.

As an illustration of the initial phase of a qualitative research process, consider the initiation of Fischer et al.'s (2007) study on consumer persistence (defined as repeated attempts to try and achieve goals when smooth action toward goal attainment is impeded in some manner). Their interest was drawn to the persistence construct in the assistive reproductive theory (ART) context based on their observations of people

whose persistence in trying to conceive via ART seemed extreme relative to what some might have considered reasonable. Based on their initial read of literatures on the construct of persistence and on the ART context, they formulated a research question asking why consumers persist when attempting to achieve goals that prove to be elusive, such as the parenthood goal in the ART context.

Note that because Fischer et al. (2007) had the ART context in mind as they framed their initial research question, that initial question was “grounded” in the pursuit of parenthood context. The term “grounded” refers to being contextually situated. At the same time, the question referred to a theoretical construct that is not unique to the context—consumer persistence—since their aim was to arrive at conceptually transferable (vs. contextually specific) theoretical insights. When the goal is to develop transferable insights, framing even initial research questions with reference to the relevant abstract concepts, and not purely in terms that are context specific, often provides the easiest path for positioning the research relative to other work in consumer behavior. Having a sense of the conceptual matters that are likely to be focal to the research from the outset is conducive to ensuring that the data collection and analysis efforts are focused and productive. In other words, good initial research questions already anticipate the theoretical conversation that the research will contribute to, and shape subsequent stages of the research process.

## Gather initial data

Once initial research questions have been formulated, it is time to start collecting initial data. There are three main types of data that qualitative researchers collect: interview data, observational data (online or offline), and archival data (which varies widely in forms and sources).<sup>3</sup> At the outset of a qualitative research project, what is critical for someone conducting consumer research is to gather data that serves two purposes. First, the researcher requires some data or information that helps them better understand the context under investigation. Often, this will come in the form of archival data such as popular press books, news reports, or public policy documents relevant to the context. Second, the researcher requires some data that will help them understand what consumers think and do in the context. Either interview data, or a mix of interview and observational data is often used for this purpose though some qualitative research is based exclusively on observational data

<sup>2</sup>This paper was not selected in order to portray it as exemplary, but rather to illustrate the approach outlined.

<sup>3</sup>It is beyond the scope of this paper to provide detailed insights on how to gather such data, and many excellent guides exist; for further guidance on collecting qualitative data, see the selected readings listed in the appendix to this paper.

(e.g., Holt, 1995) and some rely solely on archival data (e.g., Humphreys, 2010).

Note that the advice in the preceding paragraph is premised on the assumption that the researcher knows little about the context and needs to “make the strange familiar.” In some instances, however, researchers are already very familiar with the context under consideration. In such cases, the same approaches can be used to “make the familiar strange.” In other words, when a researcher is attempting to develop new insights by studying a context in which they are deeply embedded, they can use archival data and interviews to help them “bracket” their prior knowledge and identify some assumptions they have that warrant reconsideration; this can be thought of as “manufacturing distance” (McCracken, 1988, p. 23).

Because qualitative research proceeds incrementally and iteratively, only a relatively small amount of initial data should be collected before data analysis is undertaken (Belk et al., 2013; Miles et al., 2018). In fact, some methodological advice for those gathering interview data suggests collecting a single interview and analyzing it before proceeding further with the research process (e.g., Arsel, 2017). While there are no hard and fast rules about how little or how much data to collect before beginning the first round of analysis, seasoned researchers will rarely invest in more than a few interviews or episodes of observation before commencing data analysis.

To illustrate, consider again the study by Fischer et al. (2007). After making a tentative plan to investigate consumers' persistence in using ART to try to conceive, the research team collected archival data on the various types of reproductive therapies that consumers might be using, and on the typical success rates with those therapies. This equipped them to understand enough about the context to formulate a preliminary interview guide, and after each of the three authors had done a single interview, the team regrouped to undertake the next step in the research process.

## Analyze initial data

Fundamentally, analyzing qualitative data entails “coding” which refers to categorizing units of data into clusters that are internally coherent, and that are conceptually distinct from one another (Grodal et al., 2021). These categories ultimately become the concepts, the relationships, and the proposed explanations for relationships that form the foundation for theory building. However, at the outset, they will vary in their level of abstraction, and the extent to which they are specific to the context.

Initial data analysis usually involves open coding, and often involves a priori coding as well. Open coding refers to looking for conceptual categories that emerge from the data that were not anticipated a priori (Strauss & Corbin, 1998). A priori coding refers to seeking data

that fit into categories that are relevant to the conceptual matters specified in the research question, and to constructs that might be expected to be related to it based on prior literature, or on abductive reasoning (Miles et al., 2018).

In Fischer, Otnes and Tuncay's project, the a priori codes related to consumer persistence were well supported by the initial interview data, though subcategories related to “persisting with the same method” versus “trying different methods” emerged, as did codes related to “stopping” and “restarting.” Moreover, open coding revealed several unanticipated categories. For example, some related to the role of others (such as extended family members, friends, and medical service providers) in the persistence process. Other emergent codes pertained to rationalizations for sticking with some methods, trying different methods, stopping, and restarting.

## Revise research questions and review more literature(s)

Learning from the initial stage of data analysis routinely allows the researcher to understand whether the initial research question is something that can be addressed using data from the context under consideration. Almost invariably, initial research questions must be revised. Even when researchers are inspired to formulate questions based on some degree of familiarity with a context, analysis of initial data can reveal that the theoretical matter originally of interest is not central to what consumers are doing or thinking about in the setting or is not the most interesting thing emerging from the data.

If the first round of data analysis shows that the initial research question likely cannot be addressed by studying the context under consideration, the researcher may in principle choose to switch to studying some other context in the hopes that the theoretical matter they initially decided to investigate will be more salient in a different empirical context. More often, researchers find that some of the open codes that emerge during initial data analysis point toward refining or revising completely the research question (Arsel, 2017; Belk et al., 2013). Often, this happens because initial coding leads researchers to pay attention to something that is puzzling or paradoxical in their data (Grodal et al., 2021). Equally often, initial coding leads researchers to rethink what their empirical context is conceptually “a case of” (Ragin, 1992). For example, Arsel (2017) recounts that when she collected the initial data for her thesis, she thought her focal construct would be “indie consumption.” However, after gathering and analyzing initial interviews, she realized that her context was better seen as case of a marketplace in which myths interfere with consumers' identity projects, and she repositioned her work to address questions regarding how marketplace myths can pose obstacles to consumers pursuing particular identities.

The task of refining initial research questions also typically entails setting some boundaries regarding what concepts and relationships will and will not become focal as the research process unfolds. Researchers usually come to realize that there is more than one consumer phenomenon that could be studied in the context they have chosen to investigate, and it is practically impossible to investigate all of them. Judicious choices must be made about what is inside and what is outside their scope of interest and about how to direct subsequent efforts accordingly.

These choices will be guided in part by the other activity that occurs at this stage: reading more literature. If the central concepts in the research question change, entirely new literatures on the emergent concept(s) of interest will need to be reviewed. And even if the original concepts remain central to the research question, more reading of the related literature is usually helpful.

One purpose of reading additional literature is to ensure that the evolving research question is not something that has already been fully answered by existing literature; research question refinements may ensue to ensure that answering the refined research question will contribute novel theoretical insights. Arsel (2017) provides an example of refining a research question in order to ensure that a novel theoretical contribution could be made. She explains that in work that ultimately resulted in a theoretical contribution to the literature on how mundane consumer practices are connected to taste (Arsel & Bean, 2013), she and her co-author had originally thought their contribution would focus on how media narratives shape taste; this initial theoretical focus was revised because initial data analysis revealed that “there was not much new to add to the existing theory” (Arsel, 2017, p. 942).

Another purpose of reading additional literature is to help the researcher refrain from invoking early intellectual closure on their understanding of the phenomenon of interest. Wide reading can help challenge assumptions about the nature of constructs, the ways they inter-relate, and the reasons they might do so. A cautionary note must be sounded here though: there will always be more reading one can do, and too much reading can paralyze the research process. There are no hard and fast rules about how much reading is enough; however, spending weeks (vs. months) doing additional reading at each stage might be a helpful rule of thumb.

In the case of Fischer et al. (2007), initial data analysis suggested a good fit between the context (consumers using ART) and the general topic of consumer persistence. These analyses also indicated that something potentially novel about the construct could be learned by continuing to gather and analyze data from the context. This encouraged the authors to read more deeply in both psychological and sociological literatures on goal setting and goal striving. It was at this point that they recognized the patterns they were seeing in their data fit well with some of the constructs in the model of

goal striving that had been introduced by Bagozzi and Dholakia (1999), since that model explicitly recognized both cognitive and cultural influences on goal striving: this influenced slight revisions to original research question to include the concept of goal striving. Reflection on the initial data analysis also encouraged the authors to read more deeply both academic literature and popular press books related to the cultural valorization of biological parenthood. This, too, helped the authors revise their interview guide.

## Gather additional data

Once the researcher has refined or revised their research questions and read additional literature related to the conceptual matters central to their project, they proceed to gather additional data. However, reflection on the initial data analyzed typically leads to refinements to data collection procedures. One common refinement is to interview protocols. Examining the first few consumers' responses to interview questions often leads to rewording existing questions to elicit richer data (Arsel, 2017). Revised research questions and exposure to additional literature typically lead to adding additional questions to tap into aspects of the conceptual matters not previously examined (Belk et al., 2013).

Another common refinement is to sampling strategies. During the second stage of data collection, sampling typically becomes more purposive (Lincoln & Guba, 1985), that is, more driven by the specific theoretical questions of interest; the term “theoretical sampling” (Glaser & Strauss, 1970) is often used to characterize this search for interviewees, observational opportunities, and/or archival data sources that will allow the researcher to examine the conceptual terrain of interest more fully. When the main type of data being collected is interviews, this is likely to mean seeking interviewees who differ in some potentially conceptually relevant way from the initial interviewees. When the main type of data being used is observational, this may mean seeking to observe events or interactions that seem likely to be revelatory contrasting cases (Ragin, 1992). A point to note here for those more familiar with the sampling strategies associated with deductive research is that the goal of theoretical sampling is to ensure that a comprehensive theory can be created. There is nothing random about theoretical sampling; indeed, a frequent used synonym for theoretical sampling is “purposive sampling” (e.g., Figueiredo et al., 2017). And the purpose served is to ensure that the theory being generated is sufficiently comprehensive to account for variation in the matter of interest. One strategy that researchers often use in the process of theoretical sampling is to seek out “negative cases,” a term which refers to cases that do not conform to the patterns thus far detected during data

analysis (Fischer & Otnes, 2006); seeking out negative cases can help researchers to identify new properties of a construct, to recognize the existence of neglected constructs, or to specify hitherto unrecognized relationships. It can also help to set boundary conditions on the emerging theory.

Compared with the initial phase of data collection, a larger volume of data is often collected at the second stage. However, it is common, and advisable, to limit the amount of additional data collected at a second stage so that insights can be gained from another round of data analysis. Indeed, in an ideal world, analysis should ensue after every new interview or observational period; in practice, it is more realistic to gather a small set of additional data and then to update the analysis.

Fischer, Otnes, and Tuncay's second round of data collection entailed interviewing an additional 10 consumers. Before doing so, they updated their interview guide. In part, they did so because the first round of interviews had taught them more about the various vocabularies that were prevalent in the context, including the names of certain drugs and certain therapeutic techniques. They also updated the interview guide to ensure that questions relevant to all aspects of the goal-striving model were included, and to probe further on codes related to rationalizations for actions during the first round of data collection. Consistent with theoretical sampling, the researchers also purposely diversified their sample, seeking interviewees who varied in the extent to which the technologies they used entailed some violation of the norms associated with biological parenthood, and who varied in the number of "failed" attempts they had experienced.

## Reanalyze all data

Once additional data have been gathered, a new round of analysis begins. In this round of coding, new categories inevitably emerge based on insights gained from reading additional literature, updating the research question, amending interview and/or observational protocols, and expanding and diversifying the sample. Thus, while the second round of coding may begin by working with the new data collected, eventually the initial data will also need to be recoded. If coding software has not yet been used to this point in a study, it is likely to be useful to adopt some commercial package (popular options include NVIVO and Atlas.ti) to aid the researcher in managing the increasingly large volume of data that is accumulating and requiring coding and recoding. Note also that coding software of this kind is extremely useful for ease of collaboration between co-investigators or assistants involved in coding. It is common for most if not all members of a research team to code all data, though trained assistants (often

graduate students) who are not co-authors may also sometimes be recruited to code subsets of data. In either case, coding software is useful for ensuring consistency among coders and for making updates across the database when codes are revised.

At the second (and subsequent) phases of data analysis, several categorical "moves" are typical (Grodal et al., 2021). One is merging coding categories to create superordinate ones that are more conceptually abstract. Strauss and Corbin (1998) refer to this as creating "overarching" categories, and Miles et al. (2018) characterize it as a clustering process in which researchers move from lower-order to higher-order categories.

Another data analytic move is to split categories apart. As additional data are analyzed, it often happens that conceptual distinctions can be made between elements of data that have been grouped together. Splitting categories results in the creation of two or more subordinate categories. Miles et al. (2018) refer to this as "partitioning" and "unbundling." One form this process often takes in consumer research is "unbundling" consumers from one another and "partitioning" them into types who differ in conceptually significant ways. For example, the familiar expert/novice difference (Alba & Hutchinson, 1987) may be important to the emergent theory; this was the case in a recent study by Dinnin Huff et al. (2021), who found that marketing tactics geared to legitimating a previously stigmatized product (cannabis) worked differently depending on consumer's level of expertise.

Other analytic moves that may be possible at this stage of data analysis include "relating" and "sequencing" (Grodal, Anteby & Holm, 2014). Relating refers to comparing and contrasting categories that co-occur to understand the relationships among them. These relationships can vary in nature. For example, two categories might prove to be different levels of the same construct, such as lower versus higher cultural capital (e.g., see Henry, 2005). As another example, two categories might have some unidirectional or reciprocal shaping relationship (e.g., a consumer's cultural capital may influence consumer choice, because some options will seem to "fit-like-a-glove" [Allen, 2002]). Sequencing, as an analytic move, refers to identifying a temporal ordering between categories, some of which may be action categories, others of which may be object or event categories. This type of analysis is fundamental to building process theories (Giesler & Thompson, 2016).

Fischer, Otnes, and Tuncay's second round of data analysis entailed all of the analytic moves outlined above: merging, splitting, relating, and sequencing. The sequenced codes represented cycles of trying: appraising means, planning actions, and maintaining or altering goal intentions. The relational codes that began to surface at this stage were categories of rationales that appeared to have different influences on cognitions relating to means, actions, and goal intentions.



## Develop answers to research questions and write up, or continue the cycle of refining RQs and literature search, collecting data, and analyzing data

In principle, it is possible that a research process could end with two rounds of data collection and data analysis; in a best-case scenario, the writing up stage could then begin. In practice, after a second round of data collection and analysis, research questions continue to evolve, and more reading of relevant literatures is required prior to additional rounds of data collection and analysis.

At this stage, it is not uncommon for the qualitative researcher to seek out an “enabling lens” that might be useful for subsequent stages of analysis and theory building. The term “enabling lens” refers to an existing theory the researcher uses to make sense of the patterns that have emerged during data analysis; while it is not a requirement that an enabling lens be introduced, many consumer researchers have found it useful to do so (Dolbec et al., 2021). If an enabling lens is adopted, the researchers must engage in extensive reading about the theoretical lens if they are not already familiar with the constructs and assumptions it entails. Attempting to use an enabling lens without understanding its nuance and details will undermine theory-building efforts. And while researchers *may* find ways of refining or extending the enabling lens itself, this should not be regarded as necessary or ideal (Dolbec et al., 2021).

Whether or not the researcher adopts an enabling lens at this point, they are likely to proceed through multiple additional cycles of data collection, data analysis, research question adjustment, and literature reading before they are in a position to write up answers to research questions in a manner that satisfies the criteria by which qualitative research is appropriately judged. The section immediately below elaborates on these criteria. Before turning to evaluative criteria, however, it may be worth noting that Fischer et al. (2007) went through numerous additional cycles of data collection and analysis before arriving at the theoretical account of goal striving that was ultimately published. This many-phased, somewhat lengthy, the process is completely typical. A number of those cycles occurred during, and were much aided and abetted by, the review process.

Along the way, at the encouragement of reviewers, they adopted Foucault's concept of “discourses” as an enabling lens: the term discourse refers to historical, social, and political aspects of language and hence of subjectivity that shape the ways individuals make sense of their experiences. The final version of the research question in this paper was influenced by the enabling lens. It reads: “How do cultural discourses influence key cognitions about goal striving...?” The authors find that there are diverse culturally pervasive discourses that have quite distinct influences on goal striving processes; they make the case that variability in consumers' attunement

to different discourses helps to explain why goal striving behaviors and cognitions vary so much among consumers pursuing comparable goals.

## CRITERIA FOR EVALUATING QUALITATIVE RESEARCH

It would be misleading to suggest that all traditions of qualitative research share one common set of evaluative criteria: they do not. Moreover, there has been a steady evolution in the criteria that are regarded as applicable even within a given qualitative research tradition. With these caveats in mind, we outline a set of criteria that are, in our experience, now routinely being applied to qualitative research among consumer researchers publishing in journals that co-exist in JCP's academic ecosystem. We distill these criteria into five categories: conversational clarity; procedural transparency; contextual grounding; contribution caliber; and conceptual transferability. We elaborate on each below.

### Conversational clarity

This criterion refers to the extent to which it is clear what conceptual “conversation” the research is engaging with. Qualitative research that fails to pose research questions that speak to theoretical concepts or debates salient to consumer researchers rarely survives the first round of review in our journals. Spiggle (1994, p. 500) framed this as a “usefulness” criterion, indicating that qualitative research is not “useful” unless investigators make connections between their work and central issues, problems, and debates in the field they seek to contribute to. When qualitative research lacks conversational clarity, reviewers tend to dismiss it as being merely a vivid description of a unique context. At the same time, qualitative research that attempts to join too many conversations risks being dismissed for being unfocused.

### Procedural transparency

A second criterion concerns disclosure regarding the data collection and analytic procedures have been fully and clearly described. Methods sections need to explain why a study was done in a particular empirical context, what conceptual matters the researchers studied and why, and how they collected and analyzed the data (Glaser & Strauss, 2017; Pratt, 2008). Transparency is important not because there is any expectation of replicability, but rather because it helps to ensure the trustworthiness of the research which refers to “the degree to which the reader can assess whether the researchers have been honest in how the research has been carried out and reasonable in the conclusions they make” (Pratt et al., 2020, p.2).

## Contextual grounding

A third criterion that routinely surfaces in the evaluation of qualitative research is whether the analysis is well grounded in data from the context under investigation. Contextual grounding serves two purposes: it reassures the reader that the researcher has an authoritative understanding of the setting from which insights are being drawn, and it provides evidence that supports theoretical claims being made. Contextual grounding may be demonstrated through a combination of “thick description” (Geertz, 1973) of the context, field notes from observations, quotes from interviews, and/or excerpts from archival data sources. Of course, the data that is shown must be analyzed and interpreted, but analysis without data to support it will raise concerns about whether “evidentiary claims” are adequate (Spiggle, 1994, p. 501). A trend that has emerged in recent years to ensure that sufficient evidence is offered is to supplement data that is embedded in the text of the article with a table offering additional data to illustrate concepts and/or support claimed relationships (see, e.g., Tables 2, 3, and 4 in Gopaldas, 2014).

## Conceptual caliber

A fourth, critical criterion is whether informed peer reviewers see the theoretical account produced through the analytic process to be of an appropriate conceptual caliber. Accounts of appropriate caliber must be “insightful” (Holt, 1991); they must offer a transformed conceptualization of the constructs under consideration and/or of the relationships among them. Put differently, they should make the reader rethink some assumptions about the theoretical domain under investigation (Spiggle, 1994). They should provoke the response “that’s interesting!” in that they “deny certain assumptions [held by] their audience” rather than merely affirming the audience’s assumptions (Davis, 1971, p. 309).

Included in the criterion of conceptual caliber is the consideration of whether the account is plausible, in that it makes sense to the academic audience (Locke & Golden-Biddle, 1997). Other facets of conceptual caliber

include the clarity, coherence, and comprehensiveness of the conceptual account. These attributes have routinely been identified as those associated with good theories in general (e.g., Whetten, 1989), and are applicable to qualitative research methods.

## Conceptual transferability

A final criterion that is considered contestable by some qualitative researchers, but that is often raised by reviewers, is the extent to which the theoretical account is conceptually “transferable.” Transferability refers to whether the theoretical insights generated from analyzing data in the context under consideration can be generalized to other contexts that have similar characteristics (Spiggle, 1994). To be clear, this does not mean that the theoretical insights need to be generalizable to *all* other contexts. Rather, it means that there should be some clarity regarding a family of comparable contexts to which insights can be transferred.

As mentioned, not all qualitative researchers concur that this criterion should be applied. Some suggest that the “burden of proof” for transferability rests with those who want to compare one context to other contexts more than with the originator of the insights (Pratt et al., 2020). Others (e.g., Burawoy 1998) hold that theoretical insights are sufficient if they illuminate the limits of an extant theory in a given context, thereby expanding that theory so it better addresses the context. However, it is not uncommon for reviewers in our field to expect those seeking to publish qualitative researchers to convince reviewers that their insights transfer to a delimited set of contexts. Often, qualitative researchers refer to this as setting the boundary conditions within which their work is relevant.

Taken together, these five criteria—summarized in Table 1—can serve as guideposts by which those conducting qualitative research, and those reviewing it, can assess a paper that is grounded in the methodological approach outlined above. When researchers are writing up their analysis for initial submission, they may want to ask friendly readers to examine the working paper in light of these criteria. When reviewers are evaluating

**TABLE 1** Suggested criteria for assessing qualitative research

Criteria label	Conversational clarity	Procedural transparency	Contextual grounding	Contribution caliber	Conceptual transferability
What to look for in applying criteria	Is it clear what conceptual conversation the paper is joining? Is the paper trying to join too many conversations?	What context was studied and why? What data were collected and why? How were the data analyzed, and why?	Is there evidence that the authors are deeply knowledgeable about the context? Are conceptual claims supported with convincing data?	Do the theoretical claims transform pre-existing understandings? Is the theoretical account offered plausible, clear, coherent, and comprehensive?	Does the research specify the types of contexts to which the new theory is conceptually relevant?

submissions, they may both judge the extent to which the paper meets the criteria and consider how they might provide feedback to coach the paper to come closer to doing so.

This discussion of criteria that are used to evaluate qualitative research would not be complete without a brief discussion of criteria that should *not* be applied. There have been both historic and contemporary attempts to impose criteria that ultimately are inappropriate. When qualitative research was first introduced to the field of consumer research, those attempting to legitimate it often invoked Lincoln and Guba's (1985) treatise on "naturalistic inquiry" to suggest that adhering to certain methodological practices would ensure that high-quality interpretations emerged from data analysis. Examples of these practices include doing such things as "member checks" (which refers to sharing interpretations with those being studied to see if they agree) and engaging in "audits" (wherein a peer reviews all research materials to check the plausibility of the interpretation). Over time, those who routinely conduct, publish, and review qualitative research within the field of consumer research have tended to align with Holt's (1991) view that "the use of specific techniques, such as those proposed by Lincoln and Guba (1985) ... does not necessarily lead to more trustworthy research and thus they should not be used as criteria for evaluation." (p. 61). This is not to discourage researchers from engaging in these techniques if they see some value in doing so; rather it is to discourage reviewers from insisting on practices that in the end cannot ensure the theory built through the research process is an insightful, transferable one.

More recently, in the wake of the "replication crisis" in experimental psychology, some scholars (e.g., Aguinis & Solarino, 2019) have argued that open-science practices should be applied to qualitative research as well as quantitative research. This review reflects a profound misunderstanding of qualitative research, as has recently been argued by Pratt et al. (2020):

[T]he Association for Psychological Science outlined three "open practices"...: preregistration, publicly sharing one's protocols (e.g., survey items), and publicly sharing one's data. Of these three, the first is often inappropriate, the second can be problematic, and the third is potentially unethical when applied to [qualitative research]. Moreover, rigid application of the three badges is liable to put obstacles in the way of insightful and valuable qualitative research. (p. 6)

As Pham and Oh (2021) have explained, pre-registration is completely inappropriate for qualitative research: pre-registration is antithetical to the inherently open, unfolding, and iterative nature of theory building via qualitative research. With regard to sharing data collection protocols,

this is difficult for qualitative research since data collection procedures are often, appropriately, improvised in situ (Arsel, 2017). With regard to publicly sharing data, most institutional review boards and similar ethics review processes insist that the public cannot link data to particular individuals' identities; thus, sharing qualitative data publicly is likely to contravene ethical guidelines. In general, then, criteria that might be adopted to help ensure the replicability of some forms of quantitative research should not be applied to qualitative research.

A question that can also be raised is whether replicability per se is a valid criterion by which qualitative research can and should be judged. Pratt et al. (2020) have argued that the criterion of replicability is inapplicable for qualitative research since it "misses the point of what the work seeks to accomplish [namely] theory building and elaboration rather than theory testing" (p. 3). We agree. While replicability is a valid criterion if one is claiming to have deductively tested a theory, it is not valid for a research approach that involves a mix of induction and abduction with the goal of theory development. Theories that are insightful, plausible, clear, coherent, and comprehensive can be developed even though the inductive and abductive steps in an analysis are not replicable (Pratt et al., 2020). Moreover, it is possible that two researchers studying precisely the same dataset could develop quite contrasting theories, because they focused on different focal concepts and relationships that can be inductively/abductively derived from that data. This underscores the inapplicability of replication as a relevant criterion when it comes to qualitative research.

## THE WAY FORWARD FOR QUALITATIVE RESEARCH AT JCP

As we have argued above, qualitative research can be an invaluable approach to developing and refining theories pertaining to consumer psychology. And although relatively little qualitative research has appeared in the pages of JCP, we believe the conditions are in place for a change in this historical pattern. The mere fact that a dialogue on qualitative research methods was invited by the current team of editors is one strong signal in this regard. And while it can be challenging for journals to broaden the range of research they publish (Dahl et al., 2015), the groundwork is in place at JCP thanks to the thoughtful institutional efforts of the journal's leaders.

Specifically, if a journal is to be able to appropriately adjudicate qualitative research, senior members of the review team must have extensive expertise with the methodology. In line with this requirement, JCP has successfully recruited an Associate Editor (AE), Craig Thompson, who is deeply skilled in the methods and who has extensive experience as an AE shepherding qualitative work through the review process.



Beyond AEs with relevant methodological expertise, it is important for a journal that seeks to fairly and frequently review qualitative research to have members of its Editorial Review Board (ERB) with similar skills. Again, JCP has set itself up for success by appointing seasoned scholars such as Samantha Cross, Markus Giesler, David Mick, and Aric Rindfleisch to its ERB. Over time, it will be necessary to maintain such a competent cadre and it may be helpful to expand it.

What is required now is for both seasoned qualitative researchers and those who are less familiar with this approach to submit their work to the journal. Equally, those called upon to review qualitative research submitted to JCP must take on the work with good will, patience, and open minds. It may be that as more qualitative work makes its way into JCP, the journal may develop some distinctive characteristics. For example, it is possible that JCP, with its history of focusing on deductive research, will particularly welcome qualitative research that rhetorically couches its theoretical insights in terminology that takes the form of propositions suitable for subsequent theory testing. Alternatively, given its commitment to understanding consumer psychology, JCP might become a particularly welcoming home for more phenomenological accounts of consumers that help us better understand consumers' experiences. Other novel possibilities doubtless exist. Whatever they may be, we look forward to watching qualitative research gain ground at JCP.

## ORCID

Eileen Fischer  <https://orcid.org/0000-0002-8212-0414>

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## APPENDIX: SELECTED READINGS ON COLLECTING QUALITATIVE DATA

### Readings on conducting interviews

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### Readings on gathering observational data

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### Readings on gathering archival data

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