

# Shopping with consumers

## Usage as past, present and future research technique

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**Shopping with consumers, a method that has yielded useful data in the past, is demonstrated as a method that can efficiently and effectively generate naturalistic text. We review how shopping with consumers has been utilized within retailing research, compare this method with other techniques applicable to the study of consumer shopping behavior, and provide a detailed description of how we have used the method in our own research. Recommendations for future use of the method are offered for both managers and researchers.**

Keywords: shopping, *in situ* research, interpretive shopping research

In recent years, more and more researchers interested in prepurchase and purchase behavior have utilized methods designed to capture the true nature of consumers' experience in a variety of retail settings (Belk *et al.*, 1988; McGrath, 1989; Arnould and Price, 1993; Otnes *et al.*, 1993). Furthermore, other studies have focused upon developing and refining the methods to be used by researchers examining shopping behavior. These include 'autodriving' (Heisley and Levy, 1991), ethnography (Belk *et al.*, 1989; Sherry and McGrath 1989), introspective phenomenology (Hirschman and Holbrook, 1992), phenomenological interviewing (Thompson *et al.*, 1989), and projective techniques (McGrath *et al.*, 1993).<sup>1</sup>

One method that clearly holds promise for researchers interested in the study of 'contextuality, texture, native perspectives and outliers' (Sherry, 1991, p 551) within the retail setting is shopping with

consumers. Although accompanying consumers into retail settings is not new to consumer research, until recently researchers in marketing and consumer behavior have done so primarily to generate 'protocols', or 'transcript[s] of the verbalized thoughts and actions of a subject... instructed to think or problem-solve aloud' (Alexis *et al.*, 1968, p 198). As a result, researchers who have shopped with consumers have typically been more concerned with understanding consumers' internal processing of in-store information, than with understanding actual shopping behavior *per se*. Yet this paper will argue that shopping with consumers is an equally appropriate – perhaps even more appropriate – technique for researchers who wish to document naturalistic prepurchase and purchase experiences. Thus, this paper will:

- (1) review past use of shopping with consumers in existing research, discussing the various ways it has been employed;
- (2) compare the advantages and disadvantages of shopping with consumers to other interpretive research techniques applicable to the study of shopping behavior;

<sup>1</sup>We recognize that many of these methods predate the articulation of the interpretive paradigm in consumer research. However, their resurgence in popularity among researchers clearly coincides with the legitimization of this paradigm within the discipline.

**Table 1** Comparison of methods used in shopping-related studies<sup>a</sup>

Method	JCR	JM	JMR <sup>b</sup>	JR	Total
Experiment <sup>c</sup>	86	18	84	30	218
Survey	61	35	74	97	267
Interview <sup>d</sup>	18	23	30	63	134
Panel/diary	13	27	55	11	106
Scanner/sales data	3	13	14	3	33
Observation	7	4	3	5	19
Conjoint analysis	3	0	0	2	5
Focus groups	0	1	0	3	4
<b>Shopping with consumers</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>4</b>
Simulated shopping	5	3	5	5	18
Content analysis <sup>e</sup>	0	0	0	1	1
Garbology	1	0	0	0	1
Q-sort	0	0	1	1	2
Total	200	124	266	222	812

*Notes:*

<sup>a</sup>Totals reflect number of methods employed, not number of articles (812 total methods used in 764 articles)

<sup>b</sup>Includes articles in the Research Notes section

<sup>c</sup>Includes lab and field experiments

<sup>d</sup>Interviews include personal interviews at home and in the store

<sup>e</sup>Materials analyzed were written complaints by consumers

- (3) explicate and evaluate the ways we have used shopping with consumers in our own research; and
- (4) offer future suggestions for use of this method, and discuss the implications of its use for managers and researchers.

### Past use of shopping with consumers in consumer research

As background for this study, we examined descriptions of the research methods in articles that explored consumer shopping behavior. A census was conducted in journals deemed appropriate sources for such articles. All articles in the *Journal of Consumer Research* since its inception in 1974 to 1992 and articles in the *Journal of Marketing*, *Journal of Marketing Research* and *Journal of Retailing* from 1960 to 1992 were examined. Included in the census were articles examining such topics as in-store information search, alternative evaluation and/or product choice. Studies pertaining to the influence of in-store variables upon shopping behavior (eg aesthetics, displays and customer-salesperson interactions) were also included. Excluded were articles that were conceptual, that focused upon cognitive issues such as categorization, that were literature reviews of shopping-related topics, or that focused upon industrial buying and post-purchase activity.

The two main objectives of this census were: (1) to determine which methods were used in these journals by researchers exploring shopping-related behaviors; and (2) to serve as a bibliographic tool

from which to locate other articles employing shopping with consumers.

*Table 1* enumerates the methods used in a total of 764 articles that specifically examined some aspect of consumer prepurchase and purchase activity, with a total of 13 different methods employed 812 times.<sup>2</sup> Interestingly, only five studies in these journals utilized shopping with consumers as a means of studying prepurchase or purchase behavior (Bettman, 1970; Bettman and Zins, 1977; Iyer, 1989; Park *et al*, 1989; Sherry, 1990).<sup>3</sup> Even when the number of stores incorporating in-store observation is taken into account, methods for examining shopping *in situ* were employed only 23 times in these journals. In addition, our bibliographic search revealed two other studies using this technique (Alexis *et al*, 1968; King, 1969).

A few researchers employed methods in which they attempted to capture actual shopping behavior without accompanying consumers into stores. For example, Pennington (1968) enlisted the aid of salesmen, who wore wireless microphones while completing transactions in the store. Hills *et al* (1973) transported shoppers to grocery stores, waited for them to complete their shopping, and then immediately interviewed them about these trips. Olshavsky (1973) recorded complete verbal transactions that involved actual purchases of refrigerators and color televisions. Griffin and Sturdivant

<sup>2</sup>Of these studies, 721 used one method, 39 used two methods, three used three methods and one used four methods.

<sup>3</sup>Bettman (1971) describes a model he developed using data gleaned while shopping with consumers. The actual description of this method is found in Bettman (1970).

(1973) employed consumers as 'test' couples who pretended to shop for mobile homes and collected information from dealers for researchers. Houston and Stanton (1984) had two researchers record the travel times from neighborhoods to different locations of a convenience store, to develop a 'retail site model for convenience stores' (p 125). Frenzen and Davis (1990) provided demonstrators, hostesses and guests of home shopping parties with two surveys: one completed before they attended these parties and one completed while they were actually at the parties. Likewise, Gainer and Fischer (1991) visited home shopping parties to explore the female rituals that occurred at these events. While these studies demonstrate many creative ways of examining shopping behavior, they stop short of actually accompanying consumers into retail settings and examining shopping behavior from the consumer's perspective.

### Studies of shopping in other disciplines

Besides the studies in marketing and consumer behavior described above that have examined consumer shopping experiences, there has been a fair amount of work conducted by anthropologists and sociologists that has explored aspects of marketplace activities.<sup>4</sup>

Much of this work has examined the plight of the 'vulnerable' consumer – in particular, those who are at an economic disadvantage. For example, Caplovitz (1963, 1973, 1974, 1979) has examined how consumers cope with economic turndowns, as well as how those who live in low-income areas are discriminated against through unfair pricing or credit practices. However, in all of these studies, Caplovitz has employed a single research technique: that of interviewing.

Another type of retail context that has been of interest to sociologists is the 'alternative' marketplace – or the buying and selling activities that have occurred in such venues as flea markets (Maisel, 1974; Miller, 1988), secondhand shops (Wiseman, 1979), craft shows (Prus, 1984, 1985, 1986, 1989), and shopping parties (Prus and Frisby, 1990). Interestingly, however, these sociologists have primarily focused upon understanding the perspectives of vendors versus consumers at these events. For example, Prus employed the methods of interviewing, observation and actually working at craft shows to gain an understanding of how vendors interact and influence each other at these events. Only a few (eg Clark and Halford, 1978; Prus and Frisby, 1990) have examined the perspective of both buyers and sellers, and have used the traditional methods of interviewing and observation to do so.

<sup>4</sup>We are indebted to an anonymous reviewer of this manuscript for reminding us of this fact, and leading us to explore the work that sociologists and anthropologists have conducted in this area.

Finally, two recent studies report on an in-depth ethnographic project conducted in Trinidad by Miller (1993, 1994). The author describes immersing himself in the lives of his informants in order to explore their consumption patterns. And while he never specifically states that he shops with consumers, it is apparent that he acted as a participant observer in arenas where the buying and selling of goods occurred. However, because his study was so broad in its perspective, his focus upon shopping activities *per se* is limited to a relatively small part of his analysis.<sup>5</sup>

Thus, few studies from consumer behavior, sociology and anthropology feature the method of actually shopping with consumers as a way to generate naturalistically based text in retail contexts. And rather than evaluate the results of the studies that do employ this method, we will concentrate upon what each article revealed with respect to using this research technique.

### How have studies employed shopping with consumers?

The earliest uses of the method were designed to help researchers develop models of in-store consumer decision-making. Alexis *et al* (1968) sought to explain why price did not predict the choice of women's clothing in a laboratory setting. To examine this issue and to model choice behavior, the authors collected in-store protocols. Interviewers accompanied two subjects into stores, observing them as they made clothing purchases. Subjects were given specific amounts of money to spend, and were informed that they could shop for items in five product categories. The authors reported no difficulty recruiting subjects for this type of research. Furthermore, consumers were willing to have researchers accompany them on several shopping trips. Thus, few logistical problems arose through the use of shopping with consumers.

This method proved illuminating in explaining why price was not predictive of purchasing behavior. The authors observed that, in stores, price was often one of the last attributes considered. Issues of fit, style and color emerged as more salient in terms of determining whether a garment was purchased. Thus, shopping with consumers helped these researchers realize that

the laboratory studies, by not being consonant with the subjects' usual decision processes, forced them into an unusual and unreal situation (Alexis *et al*, 1968, p 205).

However, the authors also acknowledged that in terms of modeling choice from protocol data,

<sup>5</sup>Specifically, Miller (1994) describes shopping activities four times in his 322-page discussion of consumption behavior in Trinidad.

the most difficult aspect of this research is the determination of whether the resulting protocol is a valid reflection of the subjects' decision-making processes (p 198).

King (1969) also examined information retrieval while shopping. He elicited taped protocols from four consumers, who were asked to explain their choices while they shopped. King gave some subjects a microphone and asked them to articulate all thoughts fully and completely while shopping. The author used the most complete protocol acquired to create a flow diagram of choice behavior.

King's study differs from that conducted by Alexis *et al* (1968) by eliciting protocols without imposing external constraints upon shopping behavior. Furthermore, King's study reveals that consumers seemed willing to discuss their choice behavior with researchers *in situ*. Yet it also illustrates the reactance that can emerge when employing this method, especially when subjects are personal acquaintances of the researcher. The following excerpt revealed the level of King's influence over the decisions of a shopper who was a close friend:

[She says] 'Let's get some champagne to have later on Christmas Eve, huh? Do you like pink or white best? Or the red? Or what?' (King, 1969, p 29).

Bettman (1970) also wished to model shoppers' decision-making strategies, by examining the types of cues (eg product versus environmental) elicited from memory while shopping. To create this model, Bettman conducted a study with a convenience sample of five grocery shoppers, accompanying them into stores over a six- to eight-week period. Bettman taped the protocols elicited on these trips, and modeled two shoppers' behavior.

Bettman's use of shopping with consumers revealed that the factors influencing decisions for low-risk products were different from those used for high-risk products. Furthermore, shopping with consumers proved to be an excellent way of examining contrasting shopping styles. For example, one shopper was highly price-oriented, while the other typically only bought previously purchased items. Bettman demonstrates consumers' willingness to be accompanied into stores during a longitudinal study. Finally, Bettman observed that the models created by shopping with consumers closely matched the data acquired solely for validation purposes.

Bettman and Zins (1977) focused upon how consumer choice heuristics are actually implemented – in particular, whether consumers use

heuristics... stored in memory [or] construct the rules they use on the spot, during the actual course of selecting an alternative (p 75).

The authors employed the protocol data generated by Bettman (1970). They categorized this data into

individual 'episodes', each of which represented a choice made in the store. Judges coded episodes for the heuristics employed.

The authors noted that the in-store protocols

appear [to feature more constructive heuristics] than might be the case if the protocols were taken when the shopper list was being prepared outside the store (Bettman and Zins, 1977, p 82).

Further, the protocols reflect that consumers often offer retrospective explanations of why they purchased certain brands, rather than listing thoughts actually occurring while in the store. Finally, there was a high level of disagreement across judges as to which choice heuristics consumers actually employed. These limitations led the authors to agree with Alexis *et al* (1968) in concluding that

protocol data, however detailed they may be, are still relatively ambiguous and in many cases uninformative as to the nature of internal processing (Bettman and Zins, 1977, p 1983).

Park *et al* (1989) conducted a controlled field experiment, where they examined how level of store knowledge and time available for shopping affected unplanned grocery purchases. The authors transported subjects to stores, then informed them of the amount of time they had to shop in a familiar or unfamiliar store. The authors asked consumers to verbalize all thoughts and describe all actions into a microphone while shopping. Rather than actually accompanying consumers, the researchers followed 'at a discreet distance [approximately three to four feet away] that allowed the subject to talk freely but not feel alone while talking' (Park *et al*, 1989, p 426).

The authors report less disagreement among coders than Bettman and Zins (1977). Overall, they had fewer problems employing shopping with consumers in a study measuring external behavior rather than internal information-processing. However, they acknowledged that these trips might not reflect 'situations in which consumers know in advance... that they will be under situational constraints' (p 431).

Using data collected during these same shopping trips, Iyer (1989) measured conformity between a purchasing sequence described in an interview and the actual sequence observed under the different conditions of store knowledge and time pressure. The author reported no problems in employing the method of shopping with consumers as a means of testing hypotheses.

### Using the method to generate naturalistic text

With the exception of the work by Iyer and his colleagues, the studies described above were more concerned with understanding how the information stored and retrieved in the consumer's 'black box'

affected shopping behavior. Yet more recently, interpretive researchers have employed shopping with consumers when generating actual experiential understandings of consumer shopping or retail settings. While some of these studies imply the use of shopping with consumers (eg Belk *et al.*, 1988, 1989), only Sherry (1990) specifically refers to using this technique.<sup>6</sup>

Sherry's study focused upon acquiring an understanding of the

sociocultural significance of the flea market... as an alternative marketing system that complements and articulates with more commonly understood marketing systems (p 13).

To fulfill this goal, Sherry engaged in

participant observation and both directive and nondirective interviewing... I shopped with consumers, sold with dealers and made rounds with managers and retailers (p 15).

While some of Sherry's insights might have been acquired through a more passive-observer stance, his full enrollment as an 'accomplice' while shopping with informants gave him access to aspects of the flea market that might otherwise have remained hidden or ambiguous.

For example, Sherry observed consumers engaging in three main patterns of behavior in the market: 'searching, dickering and socializing' (Sherry, 1990, p 23). The following passage illustrates how shopping with consumers illuminated these three behaviors:

[Shopping with young mothers in their early 30s] The women enjoy searching for bargains and rummaging through the various wares on display. They use their shopping time to 'catch up on gossip', and to savor 'the feel' of the market... The women 'love' to 'bargain' and to 'find things', and often function as a team in their interactions with dealers. Each acts as a 'spotter' for the other, so that everyone's personal preference in items is incorporated into each shoppers' search. When an item is 'discovered', one partner will express some interest in the piece. Taking this interest as her cue, another partner will step in and attempt to dissuade the prospect by disparaging the object... Frequently, a dealer will discount merchandise in the face of such feigned resistance (Sherry, 1990, pp 23-24).

Although brief, this example illustrates how shopping with dealers helped Sherry to unpack the underlying behaviors at the flea market and achieve a deeper understanding of these behaviors.

<sup>6</sup>McGrath (1989) shopped with store owners for gift-shop inventory, but does not explicate shopping with consumers while constructing an ethnography of a single retail setting.

## Summary of literature employing shopping with consumers

The above studies reveal several germane findings with respect to the potential for using shopping with consumers as a means of collecting data or generating text. First, no researcher employing this method appeared to have difficulty recruiting consumers to be accompanied while shopping. Furthermore, consumers seem amenable to being 'rigged' with such equipment as microphones and tape recorders in the store, and to participating in longitudinal shopping studies.

However, some researchers who employed shopping with consumers suspected that protocols generated in the store may not accurately represent when consumers actually process and retrieve information in the store. Moreover, other researchers concede that consumers who are subjected to experimental conditions in the retail setting might have shopped differently if they had known of these conditions in advance. Moreover, these experimental conditions might be different from any actual constraints faced by consumers on 'everyday' shopping trips. These limitations do not necessarily imply that shopping with consumers is always inappropriate for use by researchers interested in information processing, or for those interested in conducting field experiments. However, they do affirm that all data collected in naturalistic retail contexts are not necessarily 'natural', and thus that shopping with consumers has not always, or even often, been used to study 'real-world' consumer behavior.

In contrast, Sherry's (1990) study seems to indicate that shopping with consumers is an effective means of studying consumers' actual shopping behavior as well. Our own use of the method in interpretive studies lends support to this assumption, and we believe that an argument can be made as to the value of this method for researchers, especially those operating within the interpretive paradigm. Since the advantages and disadvantages of shopping with consumers have not been articulated for interpretive researchers in particular, we now compare it with other methods that have been used to gain an experiential understanding of shopping.

## Shopping with consumers: comparison with other ways to generate text

When used by interpretive researchers, shopping with consumers involves accompanying informants into retail settings in order to generate contextually based, experientially bound text. As such, interpretive researchers would not:

- (1) require consumers to complete specific shopping tasks;

**Table 2** Comparison of shopping with consumers with other interpretive methods

Criteria	Shopping with consumers	Interviewing	Observation
Type of data generated	Immediate, informant-driven experiences in retail settings	Recollections of in-store experiences; attitudes and opinions about shopping	Recordings of in-store behavior
Proximity to consumers	High	Low	Moderate
Access to shopping agendas	Yes	N/A	No
Potential to enhance future interactions	High	Moderate	Low
Potential to enhance trust	High	High	N/A
Costs:			
Time	Moderate-high	Moderate-high	Moderate-high
Money	Moderate-high	Moderate-high	N/A
Effort	High	Low-moderate	Moderate-high
Potential for informant reactance	Moderate	Moderate	N/A
Need for researcher/informant similarity	High	Moderate	N/A

- (2) attempt to manipulate conditions in the retail setting while consumers shop; or
- (3) strive to maintain a physical or emotional distance from consumers in the store.

While some might argue that shopping with consumers is merely a specialized form of observation, we believe it is important to distinguish this type of participatory activity from the more passive form often employed in retail settings. In those cases, researchers are typically stationed at one or a few vantage points, and record the actions of consumers who are unwitting participants in the research project. Furthermore, because interpretive researchers who shop with consumers interact and converse with informants, researchers cannot only observe behavior, but can also request clarification about such behavior immediately, while still in the field.

In order to illustrate precisely what shopping with consumers contributes in terms of explicating shopping behaviors and motivations, we compared it with two other popular methods employed by interpretive researchers – namely, interviewing and observation – across a number of evaluative criteria. *Table 2* suggests that shopping with consumers has both advantages and disadvantages when compared with these methods. Where appropriate, we offer examples from our own research to illustrate these benefits and drawbacks.

### Advantages of shopping with consumers

#### *Type of data generated*

The first benefit of shopping with consumers is the type of data generated. In short, we believe shopping with consumers best enables the interpretive researcher to *record, accurately and thoroughly,*

*informant-driven experiences in the retail setting.* As such, the researcher is able to observe consumer shopping as it unfolds. In contrast, the text generated through interviewing tends to represent recollections of experiences. Likewise, passive in-store observation may not capture motivational and behavioral detail obtained when accompanying consumers in retail settings. Moreover, passive observation typically cannot capture the consumer's itinerary with any validity, because researchers employing this method do not often accompany consumers from store to store, from site to site, or on a number of shopping trips. Therefore, for researchers interested in capturing detailed accounts of consumers' shopping strategies in a variety of settings and those interested in processual issues, the text generated by shopping with consumers should prove to be more thorough and credible than that secured via other methods.

#### *Proximity to consumers*

The second important benefit offered by shopping with consumers is that researchers could potentially be provided with unrestricted proximity to the consumer in the retail setting. Because informants explicitly permit researchers to accompany them, and because researchers act more as accomplices (and sometimes as companions, helpers and friends), they can accompany the shopper to areas of the store that may be physically inaccessible to, or ethically inappropriate for, researchers engaging in passive observation. For example, one can accompany consumers into checkout lines, customer service departments, and perhaps even dressing room waiting areas.

Second, as previously mentioned, shopping with consumers often provides the researcher with unrestricted proximity to consumers when they are in transit. This opportunity provides researchers

with the ability to question informants about shopping behavior that they have witnessed, and to verify the types of shopping strategies that appeared to emerge. As a result, the text generated via this method is characterized by a high degree of credibility (Wallendorf and Belk, 1989). In contrast, recollections of shopping trips acquired via interviews may or may not be reliable portrayals of actual shopping activity. It is also possible that consumers may omit details about shopping trips that they may deem unimportant, or that they may have forgotten altogether.

Granted, there may be occasions (such as when consumers have performed illegal activities in the marketplace) when it is more important to gain perspectives *of* action via interviews, rather than perspectives *in* action via heightened participant observation such as we are advocating here (Snow and Anderson, 1987; Wallendorf and Belk, 1989). Yet most of the time, the increased proximity that will be available to researchers can yield valuable information that the consumer may dismiss as insignificant. To illustrate this fact, consider the following examples from field notes created after two shopping trips. One topic under study was the role of values in consumers' shopping tasks (Lowrey *et al.*, 1995). These examples from our text illustrate how two distinct values – bargain-consciousness and environmental concern – influence consumers' interactions with personnel, even at the checkout counter. Such interactions may be overlooked by consumers in a recollective interview, and may not be accessible to the passive observer. Moreover, the issue of how consumers' shopping experiences were affected by their interaction with checkout personnel might not have arisen had the researcher not accompanied the shopper in the first place:

When the sales clerk rang up Anne's<sup>7</sup> purchases the total seemed a little high. Anne mentioned that the lap blanket was on sale and pointed out the sale sticker. The clerk had to call someone to figure out what to do, since the electronic eye had rung it up incorrectly. Anne didn't seem impatient about this at all (the lady behind us did!). The incorrect amount was about \$1.00 too high.

Liz was ready to check out. She always brings her own plastic bag with her. The sales clerk said he had to put her things in a T J Maxx bag. Liz said, 'Call the manager if you want, but I don't need another plastic bag'. It was kind of awkward. [The clerk] was a little flustered because he messed up the sales transaction.

Thus, shopping with consumers enabled researchers to acquire information about retail experiences that were salient to consumers, but that may not be

accessible through passive observation or interviewing.

#### *Access to shopping agendas*

The third benefit of shopping with consumers for interpretive researchers is that informants *themselves* establish agendas for all shopping trips, and also point out aspects of their shopping behavior that they perceive to be pivotal or noteworthy. Therefore, the resulting text should be more reflective of consumers' actual shopping behavior – and of the priorities that emerge in the field – than either the text gleaned from interviews or observations. Thus, shopping with consumers alleviates what Jorgensen (1989) describes as the failure to

apprehend the meanings people attach to their existence... [through involvement] the researcher gains... direct access to what people think, do, and feel from multiple perspectives (p 56).

In contrast, even the most informant-driven, phenomenological interviews about shopping (Thompson *et al.*, 1989) generally yield information that consumers perceive to be important at the time of the *interview*, rather than what may have emerged as important in the retail setting. Likewise, researchers who passively observe from stationary locations have little or no access to the agendas of shoppers whom they are observing.

#### *Potential to enhance future interactions*

The fourth advantage that shopping with consumers offers is that because it enables the researcher to record informant-driven experiences, future interactions with informants tend to be more relevant and enlightening. Specifically, when coupled with in-depth interviews, researchers' abstractions and interpretations of various shopping behaviors can be tested on key informants to see if they ring true. Shoppers who agree to participate in this type of long-term study tend to be interested in both shopping and human behavior. Their agreement to participate in a research project begins a process of introspection that helps them define their own activities and rationales, and motivates them to be acute observers not only of their own behavior in the retail setting, but of the behavior of other shoppers as well.

Thus, the potent combination of shopping trips and interviews provides the informant with the opportunity to reflect and expand upon his or her own actions and comments. In contrast, researchers who employ only passive observation in stores probably will have no further interactions with focal shoppers. Therefore, the method cannot explore longitudinal changes. Likewise, researchers who employ a series of interviews will not witness real-world shopping experiences that can provide them with relevant and current topics to stimulate future discussions.

<sup>7</sup>The names of all informants have been changed to assure their anonymity.

One such example of how shopping trips introduce salient issues, and how interviews allow for elaboration upon these issues, occurred in text we generated while shopping with one informant we call Laura. During the first shopping trip, Laura clearly seemed apathetic about buying a gift for her father's girlfriend:

[In the store] I asked her what the next item was that she wanted to get. She said she and her sister had decided that morning they had better get her father's girlfriend something this year [Note: She didn't seem too thrilled about it]. She said Target had some women's sweaters on sale for \$8.99 and she wanted to look at them.

We got to the sweaters, and most of the ones remaining were red and black striped. Laura said that the girlfriend had red hair, and she didn't think they would go with her hair... There was one green sweater left, and she looked at it. She was trying to decide whether to get it or not, because it was a Medium... She said, 'Oh heck, I'll just get it and she can always take it back if she wants'. She put it in her shopping cart.

During the next interview, the researcher probed Laura on whether she was as apathetic as she had seemed about selecting a gift for her father's girlfriend. The result was a detailed outpouring about Laura's disapproval of this woman:

I: [Talking about her father's girlfriend] You didn't seem too thrilled about buying her something.

L: No, because he's gone with her since April. [Talks about how much younger she is and how her father spent a lot of money on her on diamond earrings and other gifts]. I just feel like he was getting used.

I: So did you feel obligated to buy her something?

L: Yeah, because for [her daughter's] birthday, she came over with him... Her name's Lois. We call her 'Low-Ass'. My mom's been gone seven years. I can't expect him to go through life alone... And I heard too many things about the way she was. From people who knew her, how she lived.

### *Potential to enhance trust*

Our experience reveals that the fourth benefit of shopping with consumers is its ability to expedite the process of building trusting relationships with informants. Building relationships via shared behaviors in common contexts accelerates the move from what Wallendorf and Belk (1989) describe as a 'conflict paradigm between researcher and informant to a cooperation paradigm' (p 80). Jorgensen (1989) also stresses the importance of shared researcher/informant experiences:

Perhaps the most effective general strategy for solidifying sympathetic field relations is to engage

in joint activities. By participating together, people create shared experiences... [They] serve as the cement for feelings of mutual interrelationship and friendship (p 77).

Our informants provided many indications that they viewed us as trustworthy. For example, after accompanying consumers in the field, we were often invited into their homes. Additionally, informants often asked us to supervise their children while they performed quick errands in the field. But perhaps the strongest evidence of our informants' trust was the fact that every informant whom we could locate for a longitudinal study two years later readily agreed to participate.

In summary, shopping with consumers offers many advantages to interpretive researchers, in that it enables them to record accurately informant-driven experiences occurring in the retail setting, it can potentially provide unrestricted proximity to consumers in stores, it yields a detailed understanding of informant-driven agendas, it provides for the potential of enhanced validity in future interactions, and it enables researchers to quickly and easily build trusting relationships with informants. However, as with all research methods, shopping with consumer does have some disadvantages as well. Specifically, we will discuss four potential problems with this method.

### **Disadvantages of shopping with consumers**

#### *Effectiveness as stand-alone method*

As previously discussed, the sole use of shopping with consumers to generate interpretive text would probably not be sufficient to allow researchers to acquire a true understanding of consumers' experiences, nor to generate a true 'thick description' of prepurchase or purchase behavior under study. In fact, it is probably *best* used in conjunction with other techniques, especially personal interviews. Logistically, the method does not provide the researcher with the luxury of uninterrupted in-depth conversation with informants while in the retail setting. Rather, our conversations in the field tended to be fragmentary and spontaneous, reflecting the way people converse while completing tasks. Thus, deliberate reflections upon observed shopping activity are best elicited in a structured or phenomenological interview, rather than in the retail environment itself.

#### *Costs*

Interpretive studies are often demanding in terms of the amount of time and money required in generating and transcribing text. Moreover, because intense participation is often required by informants, financial incentives may be greater than in more experimental or survey-oriented studies. And while

interviewing and observation may be equally demanding in terms of time and costs, researchers may need to exert more sheer effort when employing shopping with consumers than is required with those methods. Simply put, accompanying consumers through stores is a highly kinetic (and often frenetic) activity, and the researcher may find the shopping styles of some consumers exhausting. In addition, patience is often required when accompanying consumers who spend large amounts of time evaluating alternatives. As an example, consider the time and effort expended by one informant examining napkin rings:

The bins contained several round napkin rings in solid colors. Liz began to look at the black ones, which had a matte finish instead of a shiny finish... Liz said she was concerned about the quality of some of the napkin rings, noting some of them were 'pretty banged up after being in the bin'. She said sometimes she was picky about the way things looked that she bought. [She almost seemed to be apologizing for taking up my time.] She spent several minutes, probably five, picking out the four napkin rings she wanted to buy.

In short, researchers should ponder whether they have the time, energy and temperament to employ a research method in which the consumer rather than the researcher typically dictates the agenda and flow of text generation procedures.

#### *Potential for informant reactance*

Earlier, we argued that one of the potential benefits of shopping with consumers is that it enables researchers to accurately assess 'real' shopping behavior. Yet especially at the early stages of the research project, when the psychological distance between researcher and informant may be the greatest, the issue of how consumers' shopping behavior might be influenced by the researcher's presence must be addressed. Our own experience with the method reveals that consumers' anxiety over being a 'good' shopper quickly dissipated after the initial shopping trip. Indeed, several of our informants later expressed their relief over the fact that they did not feel their shopping behavior was being judged. Moreover, we witnessed many situations that convinced us that consumers did not self-monitor their in-store behavior. Two instances involved informants expressing dismay at the fact that no 'white' dolls of a particular brand were available. The third instance involved an informant's excitement over finding a stuffed doll that she thought her daughter would love, because its main selling feature was that it loudly 'passed gas'. Therefore, while the potential for reactance must be recognized, we believe consumers' tendencies to be inhibited or influenced by researchers decrease as the number of encounters and the level of trust increase.

One other issue that needs to be addressed with regard to informant reactance is the possibility that accompanying consumers into stores might alter their behavior. Researchers in marketing have specifically addressed the issue of how shopping companions are utilized in order specifically to share the psychological risk of making bad purchases. Solomon (1986) describes how 'surrogate consumers' are often employed when individuals lack the self-confidence to make particular purchasing decisions. Likewise, Feick and Price (1987) observed that consumers can identify 'market mavens' in their social circles, and often report tapping into their expertise when making purchasing decisions. We will discuss how consumers' behaviors can be slightly altered by the presence of researchers on shopping trips in the next section of the paper. However, because researchers are not in the employ of consumers as shopping or marketplace 'experts', we believe their influence probably does not extend to actually helping them select items for particular people on their lists. In short, we have found that researchers may be used for moral support by shoppers, but not necessarily to minimize the risk of making any particular purchases.

#### *Need for researcher/informant similarity*

Closely tied to the issue described above is the need to minimize the psychological distance between researcher and informant at the outset, by requiring members of the research team who shop with consumers to be demographically similar to the informants they study. Indeed, the proximity of the interaction between shoppers and researchers means that this issue may be even more important when researchers shop with consumers than when they merely interview them. In our own research, we observed that male and female researchers tended to have different experiences while shopping with female consumers. Especially at the initial stages of our project, more female consumers tended to include a friend or relative when a male researcher shopped with them than when both consumers and researchers were female. In addition, the male researcher/female informant dyads tended to be characterized by less familiarity and candor by the end of the project. Thus, researchers must carefully consider the issue of demographic (and especially gender) similarities among researchers and informants.

In summary, the most effective way to evaluate whether shopping with consumers would be appropriate and useful for interpretive researchers is to determine whether the temperaments of the researchers, the composition of the available research team, the topics under study, and the time frame available are compatible with the method. If such compatibility exists, we believe shopping with consumers can be an effective and enlightening research technique.

## Present use of shopping with consumers as interpretive technique

We have employed shopping with consumers as a means of generating experiential text in our own research, most notably in studies of Christmas shopping (Otnes *et al*, 1992, 1993). We have consistently used this method in conjunction with a series of personal interviews and have developed a process that we detail in this section. To illustrate the value of this method, we now discuss how we have used it in our research, and also offer a frank evaluation of the benefits and drawbacks of shopping with consumers at each stage of the research design.

### Stage 1: Recruitment of informants

We began by soliciting volunteers for our study through ads in city and university newspapers. The copy explained that we wished to interview informants twice and accompany them on two Christmas shopping trips. We offered \$30 per informant for participation. Given that informants devoted between five and seven hours to the project, we believed this amount would ensure commitment to the study.<sup>8</sup>

During our initial telephone contacts, we stated explicitly to informants that we wished to accompany them while shopping. We also asked questions to help us determine whether they had completed the bulk of their Christmas gift selection. We eliminated consumers from consideration if they had finished most or all of their shopping, or if they would not be shopping within the time frame of the project. The remaining informants were assigned to a specific researcher for the duration of the project.

We assigned five informants each to three researchers across a six-week time frame. In more recent studies (Otnes and Lowrey, 1994; Lowrey *et al*, 1995), we have reduced this ratio to three informants per researcher. Because of the time-consuming nature of shopping with consumers, assigning more than five informants per researcher may result in problems of scheduling and fatigue. We recommend that longitudinal shopping studies feature at least one researcher for every five informants, although optimally a researcher/informant ratio of 1:3 is probably more desirable.

### Stage 2: Initial interviews

We scheduled initial interviews with informants within one week after contacting them. This procedure was implemented so that all team members were in the same stage of the project and could

discuss problems related to each stage at weekly meetings. Our initial interviews with informants lasted between 45 minutes and 1 hour and were taped and transcribed.

We sought to accomplish two goals in these initial interviews: (1) to generate text related to Christmas shopping; and (2) to establish initial rapport between the researcher and informant, in order to alleviate any discomfort or psychological barriers that would interfere with the quality of text generated on any upcoming shopping trips. Initial interviews followed a schedule (McCracken, 1988) that included questions relating to shoppers' preferred information search, alternative evaluation, purchase and payment strategies. Researchers also asked consumers about their attitudes and opinions on various issues relating to Christmas shopping.

We concluded our preliminary interviews by arranging the first shopping trip with informants, to occur during the following week. We also arranged to either provide transportation for our informants, accompany them in their own vehicles or meet them at the retail site. One serendipitous result of this research design is that the time spent traveling with informants provided us with additional opportunities to interact and build rapport before and after the trip. So that informants would not regard these shopping trips as out of the ordinary, we assured them that they could bring anyone who might normally accompany them while shopping. As a result, our informants' companions ranged from infant children to parents and friends. While we were not always sure how informants explained our presence, we suspect the adult companions knew us to be researchers. We did not study their shopping behavior, because we had not established the same history of interactions with them. We also asked permission of informants to write down information about how they shopped, as well as any comments they might make about their potential or actual purchases. All informants were informed of this procedure in advance, and were amenable to it.

We believe these preliminary interviews helped us generate a baseline understanding of our informants' attitudes and opinions toward the type of shopping under study, and established a 'comfort zone' between researcher and informant. They were also pivotal in allowing us to reveal, discuss and interpret any ground rules of the study, and in helping sensitize us to the wishes of our informants before we actually accompanied them *in situ*.

### Stage 3: Initial shopping trip

Either while in transit with informants, or when we met them at the retail setting, we initially asked them a few questions to set the stage for the shopping trip. These questions were often quite general: eg, 'What are you shopping for today?' We accompanied informants to a variety of retail

<sup>8</sup>During a follow-up study with five of these informants, we discovered that many enjoyed participating in this type of research. Several revealed they would have participated in the follow-up study without any financial incentive. Thus, while some monetary incentive may be initially required, informants who participate in longitudinal work appear to find the project intrinsically rewarding.

locations, including discount stores, department stores, drugstores, hardware stores and specialty shops such as antique stores and boutiques.

Once we entered the retail setting, our role was to accompany informants as they shopped, walking alongside them, observing and making frequent, abbreviated written notes such as: 'Looked at baby sleepwear for nephew: "I don't want to spend more than \$6.99".' We used these notes to help us create detailed field notes immediately upon the conclusion of the shopping trip. When possible, we wrote down comments that informants made in stores word for word, and included comments made to others (such as salespeople or strangers). We chose not to tape these shopping trips, because we believed such action would be viewed as inappropriate and conspicuous, and might cause retailers consternation. However, we recognize that taping informants' comments might enhance the reliability of the text.

In accordance with recommendations for fieldwork made by Bogdan and Taylor (1975), we limited our time in the retail setting to one to two hours per trip. Often, if we drove with informants after the trip was complete, we reviewed our notes with them. Informants were quite helpful in reminding us of any items we overlooked, and we believe such auditing also contributed to the spirit of cooperation between researcher and informant. At this point, however, we did not offer any conclusions to informants about the kinds of behavior we observed. At the close of the first shopping trip, the researcher and informant scheduled a time to conduct the second interview during the next week.

Immediately after this shopping trip, each researcher created detailed field notes. We then crosschecked these notes with our notations made in the field, making any necessary corrections. The process of generating field notes typically required two to three hours for every hour spent in the field. Prior to the second interview, we each reread our field notes, using the material to create questions and issues for the interview.

In retrospect, we believe our first shopping trips successfully enabled us to acquire naturalistic data on Christmas shopping in a manner that was only minimally intrusive and was characterized by low levels of reactance. Furthermore, consumers were perfectly willing to clarify their purchasing behavior on these trips.

#### *Stage 4: Second interview*

As previously mentioned, one of the advantages of shopping with consumers is that it contributes to making later interactions with informants increasingly more meaningful. As such, several issues that arose during our first shopping trips were subsequently incorporated into the schedules for our second interviews. Similar to what Heisley and Levy

(1991) report when employing autodiving, we acquired more revealing information from consumers when we asked questions stemming from their own activities on shopping trips than when we asked more 'generic' questions. Therefore, we devoted the bulk of the second interview to ensuring that we had gained a valid and thorough understanding of what had actually transpired during the initial shopping trip.

We used the second interview to delve into issues that seemed to motivate specific shopping behaviors in the field, but that had not arisen during the first interview. The previous example of Laura's apathetic selection of a sweater for her father's girlfriend is one such example. Finally, we made sure we asked consumers to provide an honest assessment of whether and how we had influenced their shopping. All assured us that we had not influenced the types of goods purchased, although a few admitted that they typically did not always begin their shopping so early in the Christmas season. At the close of the second interview, we arranged the time for the second shopping trip during the following week.

#### *Stage 5: Second shopping trip*

The procedures we employed on the second shopping trip were identical to those used on the first. We did, however, notice some differences in the ways our informants acted on these trips. After three interactions, informants began to view us more perhaps as companions, perhaps as friends and perhaps as what Solomon (1986) has termed 'surrogate consumers', or agents 'retained by a consumer to guide, direct and/or transact marketplace activities' (p 208). When we found ourselves being consulted about purchases, we were careful to give neutral responses that would neither influence our informants, nor make them feel we were uninterested in their shopping. This withholding of judgment was a decision agreed upon in advance by all members of the research team. Furthermore, we noticed that more than on our first shopping trips, informants relied upon us to help them with their shopping tasks. For example, we held or carried items, watched baby carriages, and otherwise made our informants' shopping easier. Thus, by this second shopping trip, informants seemed more comfortable with the research project in general and with our presence in particular.

#### *Stage 6: Follow-up interview*

Because we were examining Christmas shopping, we employed telephone follow-up interviews with informants after the Christmas season. These interviews typically lasted between 10 and 15 minutes. Their purpose was to ascertain how well our informants' gift purchases had been received, and also to ask them to reflect upon the overall level of satisfaction with their Christmas shopping.

In retrospect, we believe more in-depth interviews would be desirable after the second shopping trip, to allow both our informants and ourselves to reflect upon the issues and topics that emerged during that trip. Therefore, our recommendation when shopping with consumers is to begin the project with an in-depth interview, and make sure each shopping trip is followed by this type of interview.

## **Future benefits of shopping with consumers**

### *Benefits for researchers*

We have shown how shopping with consumers has been used by researchers in the past, and we have explained how we have more recently used the method to successfully examine Christmas shopping from an interpretivist perspective. In this section, we argue that the method can prove useful in the future, in generating information pertaining to a variety of research topics. For in addition to examining shopping for particular types of goods such as Christmas gifts, this method could clearly be used to study more global issues related to consumer prepurchase and purchase activities.

Several of these issues have surfaced as we have used this method ourselves. For example, issues such as gender, ethnic and economic differences between shoppers clearly emerged in our Christmas data, and in studies of how brides of different ages and social classes planned their weddings (Otnes and Lowrey, 1993, 1994). Moreover, the influence of values upon shopping behavior also emerged in these studies. In addition, the influence of extrinsic factors such as store atmospherics and the interaction of shoppers with strangers (McGrath and Otnes, 1995) or salespeople in the retail setting could also be explored in a more in-depth manner than has been possible with other methods. Finally, shopping with consumers could be used to study the 'dark side' of consumer purchasing behavior such as compulsive buying (cf O'Guinn and Faber, 1989).

Furthermore, as was discovered by Alexis *et al* (1968), shopping with consumers could also be used to debunk researchers' initial assumptions about the shopping behavior of subjects participating in lab studies, or even of informants participating in more qualitative efforts. For example, our use of this method revealed how one informant's perceived level of intimacy with recipients clearly affected the amount of time, money and effort expended during gift selection, although this issue had not emerged during previous interviews.

Thus, the method of shopping with consumers, when combined with personal interviews in the context of longitudinal studies of shopping, may advance our theoretical and conceptual understanding of shopping-related issues that currently remain imperfectly understood.

### *Benefits for managers*

Detailed understanding of how, when and why different consumers shop and what their expectations are for retailer interactions and settings holds direct implications for store design, staffing and promotional activities. Future uses of shopping with consumers in specific marketplace settings can help separate and highlight the significance of the amalgamation of consumer activities of browsing, buying, returning, resting, and socializing. Studies of the context of shopping also reveal motivations and affect associated with amusement, distraction, under- and over-stimulation and frustration in retail settings. The current competitive retail environment offers shoppers the effortless option to retreat when they encounter a situation that is less than optimal. The accumulation of detailed understandings of consumers' shopping experiences through focused research efforts conducted with consumer informants in retail contexts can therefore provide astute retailers with a competitive edge.

Consumer-oriented retailers frequently rely on customer surveys to flag blatant problems. But today's successful retailers must strive to eliminate all potentially negative experiences in the marketplace for the consumer and must also differentiate themselves from merely adequate establishments. The route to such successful positioning – and to successful levels of sales – involves a process, much of which takes place *in situ*. We suggest that the factors and feelings that particular target groups associate with particular retail settings can be captured with detail and contextual richness, by establishing relationships with key informants over time and by shopping with them in conjunction with personal interviews.

## **Conclusion**

With over 2.4 million retail stores in the USA and retail sales in 1987 (the most recent retail census) just over \$1.5 trillion (*Census of Retail Trade*, 1990), issues related to consumer behavior in the retail setting acquire an economic importance that should place them at the top of both managers' and researchers' agendas. We believe the method of shopping with consumers, once articulated and legitimized, can be of benefit to both. In particular, it allows for the exploration of a wide variety of topics related to shopping behavior from the perspective of the shopper in a naturalistic context.

This paper represents one attempt to heed Sherry's (1991) call for 'enthusiastic, rigorous and playful exploration of... alternatives by novices and veteran [consumer researchers] alike' (p 568). A review of how shopping with consumers has been used in the past has is provided. Our explanation of how we have put the method to good use in our own interpretive studies argues that the technique currently has more potential than has been recognized. Although

researchers from all paradigms have benefited from employing this method, we would expect that both research objectives and empirical findings (as well as their means of accompanying shoppers in stores) will differ. Findings from both perspectives, however, hold promise for all parties involved in modern retailing.

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