

## Not Lost in Translation: Maximizing Impact in Marketing Ethnography through Bivocality

AMY MAISH

MAGDA WESOLKOWSKA

*in-sync*

*The bivocal approach is a systematic research and strategy framework that leverages marketing professionals' and social scientists' unique perspectives in order to develop brand, consumer and cultural insights relevant to the business challenge. Thus allowing all voices to be heard equally and clearly: that of the social scientist and the marketing professional, that of culture, consumer and brand. It results in an explanation for the forces at play on the brand or business questions and acts as a cultural GPS for the brand. The explanatory nature and consistent connection between brand, consumer and culture allow for a highly grounded, and we would assert, more powerfully informed set of actions, including, when, how, and why brands/products are used or could be used by consumers.*

### INTRODUCTION

“What’s wrong with ethnography?” Martin Hammersley (1991) asked this question as a double-entendre in the context of academic research, and we see the need to revisit his question due to the current dramatic interest in ethnography in marketing environments<sup>1</sup>. Dimensions of this question in our context might include: Why do clients sometimes feel ethnography under-delivers? Why do they have such great difficulty judging what ‘good’ ethnography looks like? As social scientists in a marketing and branding strategy consultancy, we routinely engage these questions and want to share some problems identified with ethnography in a conventional marketing model and provide a possible solution we call the bivocal approach.

The bivocal approach is a systematic research and strategy framework that includes ethnography (among other methods) and integrates marketing professionals’ and social

---

<sup>1</sup> We define marketing ethnography as ethnography carried out to solve business problems such as brand strategy (e.g. positioning, communication, etc) and brand innovation (e.g. platforms for innovation and opportunity areas for brand growth).

scientists<sup>2</sup> unique perspectives at each project phase, from project proposal to client debrief. The bivocal approach involves a marketing professional<sup>3</sup> and a social scientist actively collaborating throughout a project. Each of their distinct perspectives are heard and understood. The marketing strategy relationship to culture<sup>4</sup> is created by the deep and consistent shared experiences and responsibilities throughout a project. In our environment, we focus on meeting the challenges of marketing within the context of human understanding. Marketing research and strategy is about gathering insights on consumers' unmet needs no matter how created (i.e. culture, functional needs, etc), and identifying insights that provide solutions to marketing problems.

Accepting the primacy of culture is a central tenet for powerful marketing solutions in the bivocal approach because it envisions the consumer as embedded in cultural forces (e.g. changing notions of masculinity or tensions around image). The brand interacts with, and is susceptible to, the same cultural forces. Brand managers can, in-turn, use cultural knowledge to connect with or provide a compelling point-of-view reassuring to the consumer. Marketing ethnography marked by bivocality is a strategic framework that enables and shapes powerful brand opportunities by acting as a 'cultural GPS' for the brand that results in highly actionable insights. It also induces clients to become consumer advocates and share our passion for human cultural understanding.

In this paper, we first discuss the limitations of conventional approaches to marketing ethnography, then the framework of the bivocal approach and its underlying processes, and finally, some benefits and challenges.

## EMERGING LIMITATIONS OF CONVENTIONAL MODELS OF MARKETING ETHNOGRAPHY

Beginning in the 1980's, marketing departments began harnessing ethnography as a consumer insight tool in the hopes it would enable them to overcome the limitations of more conventional marketing research such as focus groups and surveys<sup>5</sup>. These methods'

<sup>2</sup> At our consultancy, both roles are called Strategists.

<sup>3</sup> The term marketing professional includes roles such as Brand Strategist, Consumer Insights Strategist, etc.

<sup>4</sup> In anthropology, culture is a contentious concept. It is usually accepted as either 1) "...[as] that complex whole which includes knowledge, belief, art, morals, law, custom, and any other capabilities and habits acquired by man as a member of society" (Tylor, 1871: p 1); or 2) "... [b]elieving that man is an animal suspended in webs of significance he has spun, (...) culture [is] those webs, and the analysis of it to be therefore not an experimental science in search of law but an interpretive one in search of meaning" (Geertz, 1973: p 3). We agree with Tylor's and Geertz' classic definitions, and add that it is an understanding of how disconnections between cultural norms, values and the sociopolitics of everyday life create cultural tensions and opportunities for unmet needs (Holt, 2004).

<sup>5</sup> Parallel shifts were seen in the product development and design environments.

main limitation was they did not explore the actual lived experience of consumers, something ethnography did. However, in the past thirty years, little consensus emerged as to what great ethnography looks like, and who should be doing it in the context of market research and strategy. Ante and Edwards (2006) summarize the disarray in the field in the often-cited *Business Week* article, “The Science of Desire,”

“Practitioners caution that all the attention ethnography is getting could lead to a backlash. Many ethnographers already complain about posers flooding the field. Others gripe that corporations are hiring anthropologists to rubber-stamp boneheaded business plans.”

Clearly ethnography has not yet reached full maturity in this context. In its current adolescent phase, ethnography is seen as a palliative for poor consumer understanding. Clients often see it more as a marketing research method or tool that brings “Aha!” in-home consumer insights, and less as a theoretical approach able to garner understanding about consumers and the cultural processes in which they are embedded. These issues point out three inherent problems with conventional marketing ethnography models where social scientists are part of the research team<sup>6</sup>: 1) marketers and social scientists use very different conceptual frameworks to inform their ethnographic work; 2) marketers and social scientists use different analytical approaches to ethnographic data; and 3) marketers and social scientists are often siloed in most marketing-centered organizations.

### Differences in conceptual frameworks

Due to their vastly different training and experience, marketing professionals and social scientists draw on unique conceptual disciplinary frameworks to inform their ethnographic work. In marketing ethnography, the marketing professional seeks unmet needs and possible solutions to problems people tackle themselves, while the social scientist looks for behavior that reflects culture and in turn shapes that culture. For most social scientists, it is rather a leap to understand culture in terms of people’s unmet needs. For the marketing professional, it is an equal leap to link consumer behavior to broader cultural theories.

These divergent perspectives create a series of inherent biases and assumptions, which underlie how each role approaches a problem using ethnography, as well as how they conduct and analyze research. In a conventional marketing ethnography model, ethnography is typically primarily envisioned as an observational technique, where social scientists are expected to deliver on one goal – providing the ‘real picture’ on consumers’ lives. They answer questions such as what happens at the dinner table or while families watch television. The social scientist is virtually confined to creating discrete data sets about how to reach a new market segment, or find a solution to an observed problem if the social scientist is invited to participate in the creation of a solution at all. In this model, where ethnography

---

<sup>6</sup> More and more marketing research companies are now employing social scientists, but many still do not, thus this is not a given situation.

privileges situational observation over larger cultural explanations (and where marketing management limits ethnography to glorified storytelling about the consumer), the social scientist's unique training<sup>7</sup> and experience as experts in culture is not leveraged. In the end, the social scientist is mostly isolated from larger strategic project goals. Thus they may find patterns across informants, but be stymied from reaching beyond the immediate data sets.

Meanwhile, the search and identification of unmet needs (or problems people tackle themselves), brand insights, the articulation of brand strategy, brand meaning and the definition of brand attributes that guide strategic brand opportunities informs the conceptual framework of the marketing professional. Their role in ethnography is to identify and select the insights that provide the best solution for the client. Most of the time, even if the marketing professional participates as a member of the research team, they only go so far to extrapolate findings to potential unmet needs and strategize solutions solutions. The issues we mention above show that in a conventional marketing research context, the conceptual frameworks are divergent and not shared, and communication between the two voices can be difficult. This type of isolation greatly limits the power of ethnography in a marketing research context.

### Differences in analytical approaches

A second problem with a conventional marketing ethnography research model is marketing professionals and social scientists use different analytical approaches when looking at ethnographic data. Although the consumer's voice might be heard by these two distinct roles participating in a project, this voice might not be heard accurately if the ethnographic data is not analyzed against the context of brand and the cultural forces within which the consumer and brand are embedded. This raises three issues. First, finding meanings behind consumer behavior requires systematic and rigorous analysis of the highly detailed observational and interviewing data about consumers generated by ethnography. Social scientists are trained in the analysis of large data sets and are adept at applying and understanding cultural theory. This provides them with the ability to draw patterns from the data sets and across projects, and to relate these beyond the immediate data sets to other observations. (e.g. their own theoretical and academic knowledge). However, social scientists working in other corporate environments to whom we spoke note that all too often current ethnographic marketing models leave those skills largely untapped. Marketing professionals coming from other work settings also observe that ethnographic data is usually left in the hands of practitioners who simply do not have the skills that naturally orient them to relate data to cultural theory. Thus, it is not about being a social scientist *per se* to perform this type of analysis, but about having their conceptual and analytical framework.

Second, finding strategic implications in the course of a project requires a different type

---

<sup>7</sup> Social scientists train both to bring understanding to the cultural underpinnings that influence people's perceptions and behaviors, and to be self-reflective (recognizing their own biases and assumptions).

of analytical and strategic skill. Marketing professionals are able to bring together what seem like disparate elements of a project, relate them to clients' needs and the brand, draw out strategic implications and provide clear business opportunities. Social scientists on the other hand are not academically trained to solve business problems and thus to prioritize insights and draw strategic implications from these. Sometimes all insights might seem relevant to a project and a business opportunity might simply not be visible to them. Usually, this means that in a conventional marketing model, as mentioned above, social scientists are not heavily involved in providing solutions.

Third, ethnography in a business context is generally used as a tool for generating single-use insights about consumer behavior. However, most ethnographic research generates what Grant McCracken (2006) called "extra data." One limitation of the conventional approach is this data frequently is not revisited once the project is finished because brand managers (or marketing professionals in consultancies) focus on solving immediate problems. They are not necessarily thinking broadly about the information they generated or beyond immediate project needs. Often this means little acknowledgement of how this extra ethnographic data may fuel other opportunities for the client's brand. Furthermore, insights identified through the analysis of cultural and social theory (which is in the public domain) also are not revisited, even though they could become foundational knowledge for a consultancy, preventing it from reinventing the wheel each time they receive a project on a related subject or consumer group<sup>8</sup>.

If either analyzes the data poorly or in isolation from the other, they will fail to fully account for the social norms that produce the behavior or perceptions identified during the ethnographic study (the voice of the consumer and culture is misunderstood), and hence they might come away with missed strategic opportunities (the voice of the brand is misunderstood). Thus, differences in analytical approaches by these two roles create a risk of misinterpretation of data and thus missed strategic opportunities for both the social scientist and the marketing professional. That is a risk we are not willing to accept.

### Organizational silos

The third problem with a conventional approach to marketing ethnography is marketing professionals and social scientists are usually siloed within organizations. In typical marketing research environments where ethnography is used, the marketing professional and social scientist are created as discrete roles, which only communicate at certain key project specific phases or moments of translation of the ethnographic data. Organizational silos create two problems for marketing ethnography. The first is isolation of knowledge, expertise, and ideas. The second is not having a common language, which may produce a

---

<sup>8</sup> We acknowledge that who owns the insights at the end of a project or what can be repurposed project to project may be a contentious issue with most clients and consultancies. We think insights obtained through the analysis of information found in the public domain (e.g. academic research) can be repurposed from project to project. Insights that are brand specific belong to the client.

lack of confidence on the part of the marketing professional and anxiety on the side of the social scientist.

The effects of this lack of confidence can be manifold. For example, social scientists possess valued social and cultural knowledge pertaining to the consumer, but marketing professionals and clients may not have confidence in them to translate complex socio-cultural theory into brand-specific or strategically relevant and usable insights that apply to the marketing problem, and realistically, they may not be good at it. This lack of confidence might be borne out of meetings where the marketing professional did not know what to do with the insights identified by the social scientist, finding them legitimate but not usable. The opposite is true of the marketing professional. Social scientists have anxiety towards them to deliver around issues relevant to the brand and translate those to clients, but social scientists do not have confidence in them to deliver around issues pertaining to the socio-cultural context of the consumer and the brand. Further, the social scientist may feel anxiety that the opportunity they see (through the cultural lens) might not be realized because the marketing professional is being too tactical. It is easy to imagine a cross-functional team meeting where the marketing professional thinks, “Get to the point!” because they inherently believe the social scientist failed to distinguish business from non-business-building insights. It is just as easy to imagine the social scientist thinking, “They are missing the point!” Thus organizational or project related silos can negatively affect communication between the marketing professionals and the social scientists. Arguably, and most important in this context, organizational silos limit the predictive and actionable capabilities of marketing professionals’ strategic recommendations (what is driving behavior) because these strategies cannot be placed in explanatory cultural models or frameworks. This may inhibit the potential of marketing ethnography to bring fresh new insights about what drives behavior, and thus limit marketing opportunities. This is controversial, but it is what every brand manager wants, to understand human behavior and be more predictive.

These three problematic areas forced us to ask ourselves, how do marketing professionals and social scientists ensure they leverage the power of ethnography to its greatest potential? What specifically can each bring to marketing ethnography? How can the field of marketing ethnography maximize insights and consider the cultural context in which consumers and brands are embedded? How does the discipline take a strong perspective on where ethnography can most powerfully inform strategic brand positioning and/or overall business strategies? The existence of EPIC implies a need and desire to find answers to these questions. We assert that a bivocal approach is a key way to overcome both internal/role-related struggles and allow marketing ethnography to reach a more complete potential.

## THE BIVOCAL APPROACH

### Defining the bivocal approach

Traditional uses of the term bivocal are found in the disciplines of logic, linguistics and music. In each instance, the term refers to a relationship that exists between two different

classes and shares each other's elements. For example in music, bivocal refers to two accapella voices creating harmony and dissonance as they follow each other along the storyline. Here we use it similarly, to refer to the relationship between marketing professional and social scientist, and take it further to refer to a specific approach integrating the two perspectives. As defined earlier, the bivocal approach is a research and strategy framework that employs ethnography and other social science research methods, and leverages marketing professionals' and social scientists' unique perspectives and conceptual frameworks at each project phase, from project proposal to client debrief. The marketing professional and social scientist actively collaborate throughout a project in the bivocal approach. The collaboration between the two roles allows each one to build on the other's core area in order to find strategy/innovation.

## Project challenges and brand opportunities

While any marketing project has unique goals and quirks, for our consultancy a positive outcome typically depends on successfully meeting four distinct challenges. First, we must hear the client's needs (including their goals and means to achieve them, such as internal commitment and brand equity). Second, we must hear the voice of culture, if you will, through a detailed initial analysis of relevant anthropological and sociological studies and then through the collection of informants' voices via fieldwork. Third, we interpret informants' voices against the backdrop of identified cultural processes. Fourth, we must collaborate internally, and then externally with the client, to develop brand and innovation based on the voice of the brand, consumer and culture.

At our consultancy, we have a strong set of beliefs that inform and underpin our bivocal approach. We believe brand opportunities stem from three key needs areas: unmet human needs originating from everyday life (e.g. Swiffer and the elimination of pail and mop); enduring or functional human needs (e.g. build a better mousetrap); and needs originating from cultural tensions, such as for example the dissonance caused by fluctuating social norms and values (e.g. new spaces for the expression of masculinity).

## The bivocal ethnographic process

The bivocal framework finds answers to the typical four project challenges by allowing both the social scientist and the marketing professional to contribute differently but complementarily to each project. In order to maintain consistency project-to-project as well as to manage expectations and aid project efficiency and efficacy, we developed and implemented internal processes to outline the *primary* responsibility for each role throughout a project<sup>9</sup>. Figure 1 shows how in our bivocal model the responsibilities of the marketing professional and the social scientist are divided during the application of these eight typical project phases. Multiple individuals might embody each role.

<sup>9</sup> This means that each is sensitive to collective project goals however, each ensures s/he delivers on his/her areas of responsibility.

**Figure 1. An overview of the roles of the marketing professional and social scientist in a bivocal ethnographic approach at different project phases**

<b>Project Phase</b>	<b>Approach/ Template</b>	<b>Social Scientist</b>	<b>Marketing Professional</b>
<b>1. Proposal response and creation of research design</b>	<ul style="list-style-type: none"> <li>• Collaborative meeting/ brainstorm</li> <li>• Research design framework</li> </ul>	<ul style="list-style-type: none"> <li>• Recommends research design and cultural themes and hypothetical implications that best address the strategic research questions</li> </ul>	<ul style="list-style-type: none"> <li>• Translates business questions into strategic research questions</li> <li>• Participates in research design</li> </ul>
<b>2. Desk-based research</b>	<ul style="list-style-type: none"> <li>• Written report filtered through series of analytical question templates</li> </ul>	<ul style="list-style-type: none"> <li>• In-depth research by mining sociological, anthropological and historical literature</li> <li>• Analyzes this information by asking several key questions: is this new? So what? Have we seen this elsewhere? What is the underlying core social science concept? What is the opposite view?</li> <li>• Distills this information into template and shares with other social scientists for feedback</li> <li>• Uses the insights to generate tentative hypotheses and research questions for fieldwork</li> </ul>	<ul style="list-style-type: none"> <li>• Gives feedback and redirects</li> </ul>
<b>3. Selection and prioritization of cultural insights</b>	<ul style="list-style-type: none"> <li>• Collaborative meeting/ Brainstorm</li> </ul>	<ul style="list-style-type: none"> <li>• Defends, where needed, the relevance of the cultural insights</li> <li>• Develops hypotheses to take into the field</li> </ul>	<ul style="list-style-type: none"> <li>• Challenges and helps refine cultural insights</li> <li>• Considers exploration of hypotheses in other research areas beyond ethnography if relevant</li> </ul>
<b>3. Fieldwork</b>	<ul style="list-style-type: none"> <li>• Loose field guide template</li> <li>• Topline phone-in or notes</li> </ul>	<ul style="list-style-type: none"> <li>• Writes field guide</li> <li>• Conducts fieldwork <i>mostly</i> with eye to socio-cultural issues and consumers' lived experience.</li> <li>• Shares with lead strategist right after each field an insights topline or notes</li> </ul>	<ul style="list-style-type: none"> <li>• Reviews/refines field guide</li> <li>• Conducts fieldwork <i>mostly</i> with eye to strategic brand issues and consumers' lived experience.</li> <li>• Shares with social scientist right after each field an insights topline or notes</li> </ul>
<b>5. Analysis</b>	<ul style="list-style-type: none"> <li>• Field report template filtered through highly relevant analytical questions</li> </ul>	<ul style="list-style-type: none"> <li>• Analyzes data using standard qualitative methods</li> <li>• Selects and prioritizes insights as relevant to strategic business questions</li> <li>• Begins to consider list of unmet needs/strategic opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Analyzes data using standard qualitative methods</li> <li>• Selects and prioritizes insights as relevant to strategic business questions</li> <li>• Begins to consider list of unmet needs/strategic opportunities</li> </ul>



<i>Project Phase</i>	<b>Approach/ Template</b>	<b>Social Scientist</b>	<b>Marketing Professional</b>
<b>6. Collaboration</b>	<ul style="list-style-type: none"> <li>• Collaborative meeting/brainstorm</li> </ul>	<ul style="list-style-type: none"> <li>• Actively collaborates with marketing professional (lead strategist and other project team members) in order to elevate and prioritize insights through several iterative meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Actively collaborates with social scientist, explaining and challenging each other, in order to elevate and prioritize the insights as they relate to strategic brand issues and the other insights generated through the other methods</li> </ul>
<b>7. Strategic opportunity ideation</b>	<ul style="list-style-type: none"> <li>• Integration brainstorm with project team</li> <li>• External collaborative meeting/brainstorm with client</li> </ul>	<ul style="list-style-type: none"> <li>• Ensures there is a consistent powerful connection between the marketing professional's emerging strategic direction and culture</li> <li>• Is a powerful advocate for the consumer</li> </ul>	<ul style="list-style-type: none"> <li>• Brings together full project team beyond just ethnography</li> <li>• Creates list of opportunities to be discussed in a larger brainstorm</li> <li>• Tells the client what we found and solicits participation in the suggested framework</li> <li>• Draws on client expertise and knowledge to elevate the strategy</li> </ul>
<b>8. Strategic exchange with client</b>	<ul style="list-style-type: none"> <li>• Debrief Template</li> </ul>	<ul style="list-style-type: none"> <li>• Is advocate for culture and the consumer as they relate to brand opportunity</li> <li>• Makes sure the client takes those insights without decoupling them from culture</li> <li>• Helps create deliverables</li> </ul>	<ul style="list-style-type: none"> <li>• Reviews insights from all methods to date</li> <li>• Selects and refines hypotheses and implications for business questions</li> <li>• Ultimately creates overall strategy</li> </ul>

## THE BENEFITS OF THE BIVOCAL APPROACH

A bivocal approach brings multiple benefits because it creates real synergy and translation between the unique perspective and conceptual frameworks of the social scientist and marketing professional. There are four classes of benefits. The first class of benefits is process related. From the outset, as we create the project research design, we find that if we factor in knowledge of cultural processes, then we reach a new place with our proposal. For example, a healthcare client wanted to explore the patient relationship with a recurring condition associated with the kidney. The social scientist proposed an exploration of the historical and culture nature of indulgence also associated with the illness. Such an approach deepened the scope of the project and provided greater understanding, meaning and depth to the research and strategic output of the project resulting in a suggestion to reframe current thoughts of the illness and focus more on the role of the kidney. Bivocality also contributes critically to fieldwork itself as often both a marketing professional and a social scientist are in the field, or at least one or the other helps shape the fieldwork guide and/or analysis. For example, a client wanted to reposition their snack brand. Both the marketing professional and the social scientist conducted fieldwork simultaneously, however they diverged in what they heard and observed and how they analyzed the data. Thus, the

marketing professional observed and heard mothers lament their family situations, specifically noting in their behavior a fragmentation of what constituted family, and family time. The social scientist saw and heard a struggle between old and idealized definitions of family togetherness and what was actually happening in these women's lives. If the marketing professional were alone on this project, they might simply provide a strategy mainly based on their fieldwork data and analysis, where mothers are given more moments of family togetherness. However, with the social scientist on board, through collaboration and sharing of fieldwork data and analysis, they were able to leverage the social scientist's insights that allowed a redefinition of togetherness and quality family time based on socio-cultural theory. In this case, the simultaneous fieldwork as well as subsequent collaboration around the analyses produced a more rounded perspective, which eventually led to a more precise strategy.

The second benefit is better solutions for projects. The bivocal approach consistently reinforces the centrality of ethnography as a business method. It allows businesses to understand why consumers do what they do or don't do. Rather than just asserting something "is" it provides an explanation for the forces at play on the brand or business questions. The explanatory nature and consistent connection between brand, consumer and culture allows for a highly grounded, and we would assert, more powerfully informed set of strategic recommendations, including, when, how, and why brands/products are used or could be used by consumers. Perhaps it is more eye-opening to clients to embed their brand in a world of norms, and values, etc. Thus, bivocality fosters a precision of strategy that is valuable especially considering how much brand strategy tends to the generic.

Clients find this highly attractive and it allows them to get excited about the socio-cultural underpinnings in the business problem areas where they are either currently acting or seeking to operate in. For example, during a brand-positioning project, a marketing professional and social scientist conducted fieldwork in physicians' offices and both recognized temporality (i.e. how informants engage with short versus long-term effects of a chronic illness) as a key physician-patient exchange issue. However, each perceived and analyzed temporality differently. The marketing professional "heard" this behavior was at odds with the client's current brand strategy; the social scientist "heard" the primacy of the present over the long-term was unlikely to shift, given current cultural precepts around pain and immediate gratification. Taken together, the two perspectives created significantly different strategic recommendations than a single perspective could, or even two, operating in relative isolation.

Third, a bivocally informed strategy may also anticipate market changes by identifying how the contexts in which their consumers, products, brands (and even employees) are changing. Again, this goes beyond trends and looks to emerging patterns in culture (e.g. consumption, work, family, identity, etc). This provides longevity to immediate strategies for brand managers, even though these may emerge from socio-cultural theory and cultural contexts that seem removed, distant and or even difficult to grasp.

Fourth, there are benefits that accrue to the organization which relate to institutional relationships and to internal and external communications. In terms of the institution, the bivocal approach creates an internal respect for the value of answering why observed behaviors occurs, and ultimately fosters institutional belief that one needs to understand the cultural underpinnings to understand behavior. For the social scientist and marketing professional it creates an environment warm to both perspectives and that values the voices they represent enough to make them equally central to business practices. Furthermore, the social scientist is routinely exposed to business, innovation and strategic questions and the marketing professional is exposed to ethnographic theory and practice, ultimately creating better skills on both sides and allowing for a more strategically sound application at each project stage. Moreover, it ensures everyone on the project truly digests the needs of the client and understands the client's brand or service is the means through which human needs are addressed.

In terms of internal and external communications, the marketing professional and the social scientist work together to ensure the insights are analyzed and communicated in a consistent manner and in language the client "gets." We find this particularly important in light of the way ethnographic stories permeate a team or an organization. On many occasions new clients within an organization for which we previously worked refer excitedly to previous ethnographic observations from other projects. In our opinion, ethnographic fieldwork creates highly tangible facts and pieces of information and one must manage these pieces of information carefully to avoid misperceptions or insights easily taken out of context. By using the bivocal approach, we ensure these stories allow understanding of the insights' greater cultural context and brand relevance rather than interesting quips for happy hour. Overall, we believe these multiple benefits confer a competitive advantage to companies who use it.

## **BIVOCAL CHALLENGES AND PITFALLS**

The bivocal approach is not without its challenges. Multiple voices at each project means more to hear, learn and digest while reaching for a common goal. The chorus of voices heard throughout the bivocal process is sometimes more time-consuming and may require more resources. We typically find that project-to-project we must tackle new questions. We do not answer these questions and their resulting issues perfectly, but we develop strategies to minimize problems and maximize benefits.

For example, how can we successfully create a common understanding and how do we manage this issue? In a project-based environment strapped for time, creating a common understanding between social scientist and marketing professional where each retains their disciplinary knowledge but also reaches into each other, is an immense challenge. In the bivocal approach, it becomes more problematic with more to understand, and truthfully, typically asks more of the social scientist, as they are "on the hook" to deliver insights and their implications distilled into concise client-friendly language. The organizational structure of the bivocal approach creates and embraces an open intellectual exchange, but the social

scientist frequently enters the environment with minimal marketing knowledge and, initially, their contributions may be a pastiche of Marketing 101 and a doctoral thesis. The marketing strategist and social scientist need assistance and the initial communication gap creates frequent impasse points, especially in the data analysis phase. We manage this difficulty by creating a common understanding through recruiting, exposure and education. We recruit people with one dominant perspective but an ability and interest in the other. External marketing training courses and copious exposure to internal processes and templates through partnered participation with another social scientist are powerful for quick learning on the marketing and consulting environment. This in turn enables the social scientist more nimbly to educate and expose the marketing professional to the social sciences. The marketing professional becomes empowered with principles of social science (e.g. insider/outsider view, etc) and receives direct training (e.g. shadowing in the field, lunch and learn sessions). To manage these issues, we created templates for each project phase application, whether during proposal and research design or the analysis of insights. Templates ensure accurate translation of information between the marketing professional and the social scientist. The templates act more as guidelines to help frame insights or questions in a similar manner rather than fill-in-the-blank tools (See Fig.1).

Second, how do we retain knowledge between projects so we do not continually reinvent and repetitively explore the same territory? We try continually to build upon and improve our strategic output, as well as streamline our internal processes. In our efforts to do so, we have created a Knowledge Bank. It is an internal searchable project database that allows quick access to completed projects. This internal project is ongoing and ultimately we would like to be able to search for cultural areas previously explored as well as academic references tied to these, since we find that the necessary social science information is not easily searchable or traceable and much time and energy is wasted when it could be easily avoided. The idea will be to index key references and make note of the main reasons they were helpful for the marketing strategy or innovation it informed. This type of database will allow insight layering and create additional depth or contrast for a new project or with which to seek patterns across a diversity of projects and ultimately yield depth to strategic outcomes. However as we work towards this end, this database raises questions around the repurposing of insights and cultural knowledge, especially if two different clients want to explore key information on the same group or cultural issue. Presently, insights generated from the public domain (i.e. academic anthropological, sociological theory, historical interpretations) may remain with our consultancy, however specific insights related to a project belong to a client. Our ultimate goal is to be able to own all insights generated from a project while the client owns the strategy.

Third, we have to ask ourselves: can one person fulfill both roles successfully? And what would this person be? Would they require a different type of work experience and training than traditional social scientists and marketing professionals already receive? Do they require a specific type of instinct for solving business specific problems? Seemingly, the answer to the first question is yes, as there are clearly examples of such persons in the EPIC audience. There are big challenges to learn the ropes on the opposite side of the fence and

one must be willing and ready to jump into unfamiliar territory and balance the demands of a discipline different than their own while not losing sight from where they came. But even if the same person can fill both roles, should they in the bivocal approach? Our answer here is most likely no. Complete fluency in the two areas allows for quicker elevation and determination of results during each project phase and eliminates the aforementioned translation difficulties. Such bilingual individuals are highly valuable, but two individuals in the two roles add intellectual rigor and balance to the approach. Without it the approach loses its checks and balances and assumptions may create dissonance in the project process or outcomes. Moreover, it may not be the goal or interest of a marketing strategist or social scientist to become the other. Rather, we recognize their individuality, and their mutually complementary value.

## CONCLUSION

The bivocal ethnographic approach consistently reinforces the centrality of ethnography as a business method valuable to strategic outcomes. In this paper we present the bivocal approach as a systematic research and strategy framework that leverages marketing professionals' and social scientists' unique perspectives at each phase of a project in order to develop brand, consumer and cultural insights relevant to the business challenge. Thus, the bivocal approach allows all the voices to be heard equally: that of the social scientist and the marketing professional, that of culture, consumer and brand. Furthermore, the bivocal approach ensures that biased assumptions (created by either marketing or social science) are called out. The bivocal approach allows the strength of each to thrive through an ethnographic process that mandates inclusion, communication and collaboration at all stages while bringing out what is strategically important to the brand or key business questions. The bivocal approach allows businesses to understand why consumers do what they do (or don't do) and how they make sense of their world in relation to their brand. Rather than simply asserting something "is", it provides an explanation for the forces at play on the brand or business questions acting as a cultural GPS for the brand. The explanatory nature and consistent connection between brand, consumer and culture allow for a highly grounded, and we would assert, more powerfully informed set of actions, including, when, how, and why brands/products are used or could be used by consumers.

*Acknowledgments* – We wish to acknowledge Janet Winkler and Lisa Reichenbach for critically reviewing our drafts and our many colleagues at in-sync in Toronto, for their various insights and contributions while crafting this paper. We want to also thank Rich Radka for his judicious comments and editing suggestions that helped us greatly along the way.

## REFERENCES

- Ante, S and Edwards, C.  
2006 "Science of Desire." *Business Week*, June 5, 2006.  
[http://www.businessweek.com/magazine/content/06\\_23/b3987083.htm](http://www.businessweek.com/magazine/content/06_23/b3987083.htm) (last

*Harmony*

accessed September 2007)

Geertz, C.

1973

*The Interpretation Of Cultures*. New York: Harper Collins.

Hammersley, M.

1991

*What's Wrong With Ethnography?* London: Routledge.

Holt, D.

2004

*How Brands Become Icons: The Principles of Cultural Branding*. Cambridge, MA: Harvard University Press.

Mariampolski, H.

2006

*Ethnography for marketers*. Thousand Oaks, CA: Sage.

McCracken, G.

2006

“Keynote Address; Ethnography and the “Extra Data” Opportunity.” *EPIC 2006 Conference Proceedings*. Sep 2006, Vol. 2006, No. 1: 1-3.

Tylor, E.B.

1871

*Primitive Culture: Researches into the Development of Mythology, Philosophy, Religion, Art and Custom*. 2 vols. London: John Murray.