

Studying complex marketing phenomena: a multi-phase, multi-method qualitative market research framework

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Abstract

Purpose – Studying complex phenomena in marketing requires robust multi-method qualitative designs. This paper aims to develop and present a multi-phase, multi-method qualitative market research framework for studying complex phenomena in marketing.

Design/methodology/approach – Details are given of a four-phase multi-method design used to study a complex phenomenon in marketing – how sustainable brands and consumers co-create sustainability – culminating in the development of a framework.

Findings – The development and implementation of a four-phase multi-method design illustrates how systematic, meticulous and multi-angled qualitative research can contribute to understanding complex phenomena such as sustainability and can progress theory in this critical space. Three research design principles – layering, coordination and multi-method integration – are identified as essential for theory building when examining complex phenomena.

Practical implications – Recommendations guide both academics and practitioners to enhance research outcomes in research related to complex phenomena such as sustainability.

Originality/value – This study offers a multi-phase, multi-method qualitative market research framework designed to support scholars studying complex marketing phenomenon characterised by relational complexity, multiple actors and multi-platform dynamics, or where scholars seek to build theory in this domain.

Keywords Qualitative methods, Multi-methods, Complex phenomena, Marketing

Paper type Research paper

Introduction

There is an increasing desire for qualitative research that captures complex phenomena in marketing, so nuances can be explored and theoretical understanding advanced (Fischer and Guzel, 2023; Valtakoski, 2020). This reflects a shift in marketing from viewing markets and consumer behaviour as predictable and deterministic, to understanding them as complex adaptive systems, driven by dynamically distributed value creation in a global context, and characterised by relational, emergent and evolving market phenomena (Vargo *et al.*, 2023). Addressing this shift therefore requires qualitative research methods that are flexible, process-oriented and capable of capturing the emergent, relational and dynamic nature of



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marketing phenomena within complex dynamic systems, to elicit quality data and support theory building (Crick, 2021; Dodds *et al.*, 2018; Eisenhardt, 2021; Lim, 2025).

Although qualitative researchers in marketing do implement “multi-method and multi-phase” design, usually via case study research and ethnography, their methods and results are not commonly reported, and single methods (e.g. interviewing) still prevail (Crick, 2021; Fischer and Guzel, 2023; Levitt, 2021). However, while traditional qualitative methodologies (e.g. Gioia *et al.*, 2013; Spiggle, 1994; Strauss and Corbin, 1990) provide robust tools for sense making and theory building, they do not explicitly incorporate multi-method, multi-phase designs that are deliberately scaffolded to understand complex phenomena.

In marketing, a complex phenomenon refers to dynamic, interconnected systems where outcomes emerge from nonlinear interactions among multiple actors, technologies and institutional forces. These phenomena are adaptive, context-dependent and relational – defying reductionist cause-and-effect models and requiring methods that capture emergent patterns and co-created value within evolving market ecosystems (Giesler and Fischer, 2017). This necessitates a research design that can integrate diverse perspectives and methodologies to generate actionable knowledge (Ferraro *et al.*, 2015; George *et al.*, 2016; Wuelser *et al.*, 2012). Furthermore, theory building shows that qualitative, phenomenon-driven inquiry remains essential to capture the rich contextual details and diverse stakeholder perspectives (Eisenhardt, 2021; Eisenhardt *et al.*, 2016) critical to the marketplace.

Traditionally, marketing has drawn heavily on theories from other disciplines such as psychology and economics. However, recent scholarship emphasises the need for “homegrown” theories that address issues central to the marketing domain Kohli and Haenlein, (2021); Ulaga *et al.*, (2021). More systematic, meticulous and multi-angled methods are needed in marketing theory building. The multi-phase, multi-method research design presented in this paper focuses on the complex marketing phenomenon of sustainability marketing and shows how marketing practices and activities enable the co-creation of sustainability and transformation towards sustainable futures. While sustainability is now a major focus of business, its implementation is increasingly recognised as being a co-created service underpinned by a series of reinforcing and balancing feedback loops within complex adaptive ecosystems, such as collaborative networks involving firms, consumers and public institutions (Saviano *et al.*, 2025). Sustainability marketing and service ecosystems exemplify complex phenomena, which emerge through nonlinear, dynamic interactions among consumers, brands, institutions and technologies across global networks (Field *et al.*, 2021; Grewal *et al.*, 2024; Sheth and Parvatiyar, 2021). This suggests that traditional, simpler forms of analysis may no longer be adequate to capture this increasing complexity.

To address this potential shortfall in studying complex marketing phenomena, we propose a multi-phase, multi-method qualitative market research framework, which is designed to support scholars engaged in theory building across domains where marketing phenomena are relational, emergent and dynamic. The framework introduces three guiding principles – layering, coordination and multi-method integration – which together offer a structured yet flexible design logic for scaffolded, multi-phased inquiry. Unlike conventional qualitative designs that often treat qualitative methods as standalone tools, our framework operationalises methodological integration across phases to capture evolving interactions among actors, contexts and constructs, enabling richer theorisation in areas such as sustainability marketing, value co-creation and service ecosystems. While the framework is adaptable, we acknowledge that it is not universally applicable to all marketing contexts, and so marketing scholars may need to tailor its scope, depth and methodological combinations

to meet specific contextual, cultural and ethical constraints. Nonetheless, the core principles we articulate remain broadly relevant as transferable design considerations for studying complex marketing phenomena across diverse settings.

The paper is structured as follows. Firstly, we discuss the literature pertaining to researching complex phenomena and qualitative multi-method, multiple-phase methodology. A detailed description and discussion of our four phases of research follows. We then present and discuss the framework and its three principles through our reflections on developing and implementing our methods, before offering some concluding remarks.

Researching complex phenomena

Complex phenomena in marketing

A complex phenomenon refers to a system or issue characterised by multiple interacting elements, nonlinear relationships and emergent outcomes that cannot be fully understood through reductionist analytical approaches (Byrne and Callaghan, 2022). Complexity implies that phenomena are inherently dynamic, adaptive and context-dependent, with behaviours emerging from the interactions between components rather than from the various components in isolation (Byrne and Callaghan, 2022; Cilliers, 1998). These systems often exhibit feedback loops, self-organisation and unpredictability, making them difficult to model or control (Richardson, 2004).

Complex marketing phenomena cover a very broad range, including the market systems, consumer behaviours and brand dynamics that emerge from the nonlinear, adaptive and contextually embedded interactions of multiple stakeholders, technologies and sociocultural forces (Giesler and Fischer, 2017). The examples we present in this paper demonstrate just some of the types of nonlinear and emergent dynamics that qualitative market research must account for. Understanding complex marketing phenomena often requires systems thinking, acknowledging that outcomes are co-created and are seldom solely attributable to those actions a business can control (Gummesson, 2017). Because marketing emerges out of multi-actor service ecosystems, markets are conceptualised as service ecosystems where value is co-created through dynamic resource integration among actors (Chandler and Vargo, 2011; Vargo and Lusch, 2016). These ecosystems exhibit nested structures, where micro-level interactions (e.g. consumer-brand engagement) influence and are influenced by meso- and macro-level institutional logics (Akaka *et al.*, 2013). This recursive and interdependent interplay creates emergent outcomes that cannot be predicted by analysing isolated components, defying reduction to linear cause-and-effect relationships (Vargo *et al.*, 2023).

Moreover, contemporary marketing environments are increasingly shaped by technology-driven, sociopolitical and culturally embedded forces, all of which introduce the nonlinear interactions, unpredictability and emergent patterns characteristic of complexity. One example of this is the rise of AI-mediated consumer behaviour, with algorithmic curation, personalised recommendations and automated decision environments creating feedback loops that shape preferences, reinforce biases and influence consumption in ways that are difficult to anticipate or control (Oğuz, 2024; Ribeiro *et al.*, 2025). Similarly, when capturing online consumer behaviour, recognition that digital interactions are fluid, multi-platform and socially networked means that any emergent patterns cannot be reduced to isolated individual decisions (Appel *et al.*, 2020).

In addition, complex marketing phenomena increasingly intersect with geopolitical dynamics. Issues such as consumer animosity within geopolitical blocs, cross-border tensions and global political events influence market sentiment and brand meaning in unpredictable ways (Koehn, 2025). These geopolitical tensions operate across multiple levels – from macro-level international relations to micro-level psychological responses –

creating volatile and context-dependent patterns of consumer behaviour (Sarfraz, 2025). Crucially, culture itself is a major source of complexity. As a multifaceted construct operating at societal, community and individual levels, culture shapes value systems, identity performances and interpretations of marketplace signals in ways that are rarely stable or homogeneous (Arnould *et al.*, 2023). Cultural norms and symbolic structures evolve over time, interact with global influences and vary across contexts, making an appreciation of cultural dynamics central to understanding consumer behaviour and global marketing (De Mooij, 2019).

In our research context, sustainability-related preferences exemplify complexity in marketing because they often evolve through cultural narratives, peer influence and technological affordances such as recommendation algorithms, which reinforce eco-conscious choices and create self-reinforcing behavioural patterns (Giesler and Fischer, 2017; Lambertson and Stephen, 2016). Such dynamics challenge traditional models premised on rational, independent choice and underscore the need for methodologies that capture emergent, recursive and socially embedded consumer behaviours.

Qualitative marketing research to study complex phenomena

Studying complex phenomena presents unique challenges for researchers, who act as one group of observers attempting to make sense of multifaceted relationships (Wenzel *et al.*, 2016). As is commonly acknowledged, qualitative inquiry is particularly well-suited to investigating complex phenomena, as it allows researchers to explore issues more deeply and develop insights that contribute to broader theoretical and practical understandings (Levitt, 2021). The aim of qualitative research is to achieve a rich, contextualised understanding of social dynamics, and to produce analytical generalisations rather than statistical ones (Eisenhardt, 1989; Yin, 2014). Qualitative methodology acknowledges the inherent ambiguity and “messiness” of complex phenomena, capturing their evolving nature by “moving from a shapeless data spaghetti towards some kind of theoretical understanding” (Langley, 1999, p. 694). Through this lens, qualitative methods serve as valuable tools for unpacking the “black box” of complexity, offering insight into the underlying processes and logic at play (Langley *et al.*, 2013).

Qualitative research that emphasises reflexivity and interpretive depth is essential for understanding complex contexts such as services, and systemic and societal issues (Valtakoski, 2020). As a result, scholars increasingly advocate for the incorporation of particular methodologies, such as ethnographies or case studies, to better address the nuances of societal and marketplace issues (Kistruck and Shantz, 2022). Qualitative methods facilitate a more holistic understanding by integrating multiple stakeholder perspectives, capturing evolving processes and enabling pragmatic action in complex settings (Ferraro *et al.*, 2015; George *et al.*, 2016).

Multi-method qualitative designs have been implemented in marketing and business research over the past two decades, combining case study research with standard sources of data, such as interviews and secondary data from the target firm (Palakshappa and Gordon, 2006; Spanjaard *et al.*, 2014). More recently, the field is also considering multi-actor perspectives (e.g. Godefroit-Winkel and Peñaloza, 2024) and including other data sources, such as social media platforms (Cavusoglu and Belk, 2024; Kondakciu *et al.*, 2022). Nevertheless, relatively few marketing-related studies implement multi-method and multi-phased research design, with the exception of some ethnographic research projects. Despite recognition that multi-methods and phases are needed, single qualitative method design still predominates in marketing (Crick, 2021). However, to advance marketing research on complex phenomena we argue that it is necessary to embrace methodological diversity and

incorporate multi-phased, multi-method research that can adequately reflect the multifaceted nature of critical societal issues and the changing marketing landscape.

Table 1 provides an overview of the qualitative designs used to examine complex issues in marketing – single-method, multi-method and multi-phase, multi-method – highlighting the strengths and limitations of each. Due to the scope and nature of our paper, the examples we include of marketing and consumption research are given for illustrative purposes only. We acknowledge the limitation of this and suggest that future research could conduct a systematic review of the qualitative designs used to address complex phenomena in marketing. However, what the table here does highlight is a progression of qualitative designs for studying complex marketing phenomena. Single-method designs provide deep contextual insights yet lack triangulation and generalisability (Crick, 2021). Multi-method designs combine complementary techniques for richer understanding, although integration and theoretical alignment can be challenging (Davis *et al.*, 2011). Finally, multi-phase, multi-method designs – such as the design in our study – deliver the most comprehensive perspective by layering methods across phases, enabling triangulation and theory development, albeit with higher resource demands. Although multi-method, multi-phased designs are not new to marketing, they are not widely implemented, and to the best of our knowledge no frameworks exist that can guide qualitative market researchers considering implementing such designs.

Developing a qualitative multi-phase, multi-method design

In this section, we outline the context and process we used to develop a qualitative multi-phase, multi-method design for our research on how sustainable firms (sustainable fashion brands) and their consumers co-create value around sustainability through marketing practices, leading to potential sustainable transformation. The primary purpose of this research project was to build theory in sustainability marketing. Specifically, we were interested in understanding how marketing practices contribute to the co-creation of sustainability by leveraging the transformative potential of actors, relationships and business practices within an interconnected ecosystem, thereby offering a pathway to meaningful societal change (Enquist *et al.*, 2015; Gardiazabal and Bianchi, 2021; Leo *et al.*, 2019).

Theory building in challenging areas such as sustainability needs to be underpinned by a rigorous approach to data collection and analysis (Huq and Stevenson, 2020). In particular, the assurance of trustworthiness rests on the availability of (and access to) quality data sources, and opportunities to triangulate data sourced via different collection methods (Kapoulas and Mitic, 2012). However, sustainability research related to marketing is often still conceptual (e.g. De Ruyter *et al.*, 2022; Field *et al.*, 2021; Vink *et al.*, 2021), or relies predominately on one source of data, such as interviews with the managers of businesses about their experiences and opinions on sustainability (e.g. Feri *et al.*, 2024; Kaur *et al.*, 2024), or with consumers about sustainable consumption and their lived experiences (e.g. Ansari *et al.*, 2023; Ritch, 2020).

During the development of our research design, we became aware that very few studies in marketing have adopted a multi-phase, multi-method design, which prompted us to reflect further on the design and execution of our own research process. Our reflection involved examining how each phase contributed unique insights, and how layering methods enhanced theoretical depth and contextual understanding. By analysing the complementarities and tensions between methods – such as interviews, netnography and focus groups – we identified principles for coordinating diverse approaches that would capture emergent, relational dynamics in sustainability marketing. An iterative evaluation revealed that a structured, yet flexible design is essential for studying complex phenomena, as it enables

Table 1. Overview of qualitative research designs to address complex phenomena in marketing

Research design	Description	Examples of research within the context of marketing and consumption	Strengths	Limitations
Single method design	Exploratory, in-depth interviews, focus groups, ethnography and netnography to understand meanings, experiences and contexts	In-depth case studies of consumers and their relationships with brands (Fournier, 1998) In-depth interviews with consumers discussing their experiences of fashion (Thompson and Haytko, 1997) Content analysis of greenfluencers on Instagram (Hoek et al., 2025) Analysis of Instagram sustainability brand posts and follower comments (Bulmer et al., 2024) Analysis of dominant anti-consumption discourses on websites (Cherrier, 2009)	Provides rich, contextual insights; captures complexity and nuance	Data are less trustworthy and dependable (no triangulation); single methods; subjective analysis; limited generalisability
Multi-method design	Design combining two or more qualitative methods (e.g. interviews and visual methods; interviews and observations)	Netnography, multi-method observation and qualitative depth-interviews investigating engagement in online consumer brand communities (Brodie et al., 2013) Digital ethnography, visual narrative analysis and in-depth interviews investigating visual narratives on the environmental crisis on Instagram (San Cornelio et al., 2024) Visual stimuli and interviews to investigate consumer motivations to post brand content (Nanne et al., 2024)	Combines strengths of multiple methods; provides holistic understanding; comprehensive insights; ensures rigour	Analysis complexity due to various data sets and difficulty synthesising data; theoretical misalignment
Multi-phase, multi-method design	Design that involves multiple methods across multiple phases	The Consumer Odyssey project involved mobile ethnography, participant observation, depth interviews, artifact and visual documentation and team-based interpretive analysis (e.g. sacred and profane possessions and consumption, Belk et al., 1989) Ethnography, interviews and staged fieldwork to understand extraordinary consumption experiences (Arnould and Price, 1993) Ethnographic research design, combining immersive fieldwork and analysis of social-media storytelling to understand digital stories and the process of market innovation (Cayla et al., 2025)	Comprehensive; captures different perspectives; triangulation; flexible and adaptable; enables theory development	Resource- and time-intensive, synthesising diverse types of qualitative data across methods and phases

Source(s): Authors' own work

triangulation, accommodates evolving research questions and supports theory building. These insights informed the development of a framework that emphasises coordination, layering and adaptability as the core guiding principles for qualitative inquiry in complex marketing contexts. We now outline in detail our four-phase process, providing insights and reflections.

A four-phase research process

The four phases of our research were carefully developed to ensure each step built on the last and allowed for relevant qualitative multi-methods to be implemented, promoting greater theory development in marketing practice around sustainability (Crick, 2021). Refer to Figure 1 for an overview of the four phases. Each phase is now discussed in detail. We present some key findings from each phase to provide background on how our research evolved, and to illustrate how our design enabled theory building.

Phase 1 – Sustainable fashion brand secondary case analysis. *How did we decide what this phase involved?*

Phase 1 was guided by our goal of understanding how marketing can be used to co-create sustainability and transformation towards sustainable futures. It was important to select and examine cases that highlight best marketing practice and identify promising tactics for co-creating sustainability to gain the new insights needed to promote theory building (Eisenhardt, 2021). Cases were selected using five key criteria: (1) each case was an established fashion apparel/footwear brand with retail outlets; (2) brands had sustainability embedded in their core values and marketing practices, including offering sustainable products, ensuring transparency in marketing practices and actively promoting sustainability

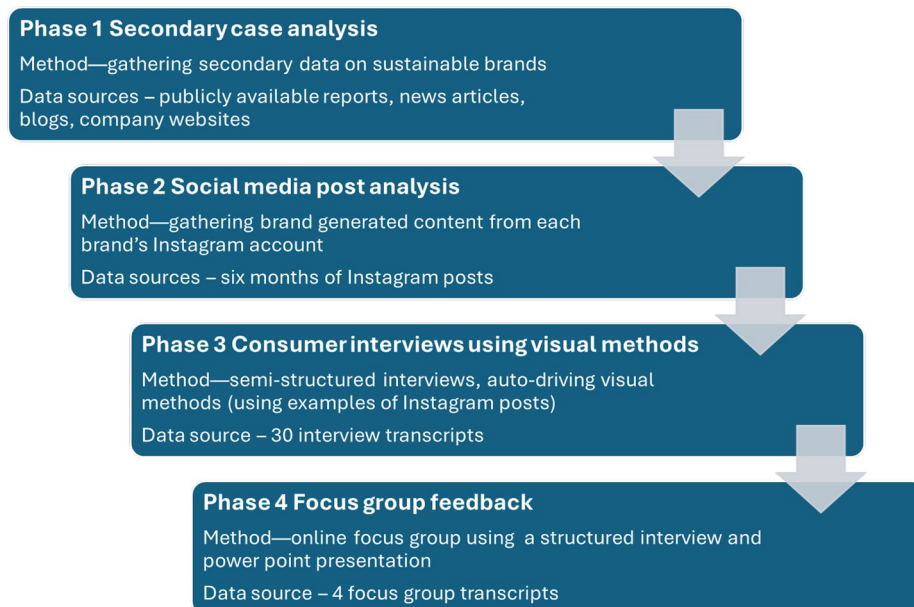


Figure 1. Overview of the four phases

Source: Authors' own work

on digital platforms; (3) brands demonstrated a mix of different sustainability pillars and issues (i.e. environmental, social, wellbeing) underpinned by strong purpose; (4) brands posted content regularly on their Instagram accounts about sustainability issues; and (5) there was a mix of global and local retailers among the selected brands. [Table 2](#) highlights how our three brands exemplified the five criteria.

Data were collected from multiple sources. Firstly, we undertook a Google Scholar search for the selected sustainable fashion (SF) retail brand names to identify case material that had been previously collected and published in scholarly publications. This involved a brand-name search to find relevant articles published between January 2019 and January 2020 (the period prior to phase 2 data collection, which started in January 2020). This search yielded 10 relevant academic articles. Then, we deployed a broader search of our institution's library databases within the same date range, using the brand names as keywords to find publicly available reports and news articles. This identified three reports and 20 news articles. Finally, we looked at the brands' own official Webpages and social media platforms – Instagram and Facebook.

Why was this phase important?

Using well-considered selection criteria was a critical step to ensure we had exemplary SF brands that were homogenous in their commitment to sustainability but also represented a mix of sustainability pillars, especially environmental and social. Accordingly, these three cases were chosen because they had what [Eisenhardt \(2021\)](#) refers to as “common antecedents” that influence the focal outcome. In this research, the primary common antecedent was that each case had embedded values relating to sustainability and to sustainability marketing practices (including posting on Instagram), and the focal outcome was the co-creation of sustainability.

The secondary sources of data on each of the three SF brands were analysed to determine key sustainability brand marketing practices that potentially lead to the co-creation of sustainability. In this phase we identified three key sustainability marketing practices that are important for a brand to co-creating sustainability: (1) offering sustainable products or consistently working towards using sustainable materials (e.g. certified organic cotton); (2) commitment to being “transparent” about their marketing practices (e.g. transparent supply chain, commitment to environmental/social causes); and importantly, (3) actively promoting sustainability issues and sustainable consumption, especially on social media platforms like Instagram.

What did we learn in this phase?

Phase 1 made it very obvious that the brands we had selected were using Instagram more strategically than we had previously imagined. Although one of the selection criteria was that each brand needed to be actively posting about sustainability, the extent and breadth of this was not apparent until we completed Phase 1. Brands were not only posting about sustainability as a sales or marketing tactic, they were also using the platform to promote sustainability issues for the greater good of people and planet. This learning highlighted the need for further research to better understand the sustainability messaging in these SF retail brands' Instagram posts. Identifying this gap provided the foundation for Phase 2 and the next layer of insights, where further research was conducted into each brand's use of Instagram as a platform to engage with consumers about sustainability.

Reflection

Phase 1, guided by the Eisenhardt Method ([Eisenhardt, 2021](#)), provided a critical foundation for our research design. By engaging in multi-case theory building, we confronted the complexity of sustainability marketing through iterative construct development and theoretical integration. This process revealed that employing a single

Table 2. Case brands and key selection criteria

Criteria	Brand A	Brand B	Brand C
(1) Each brand was an established fashion apparel/footwear brand with retail outlets	Headquarters: Vancouver, Canada Retail stores: 670 globally	Headquarters: San Francisco, USA Retail stores: 20 USA 4 UK/Europe 1 New Zealand 4 China 2 Japan 1 South Korea	Headquarters: New Zealand Retail stores: 2 New Zealand Markets: global
(2) Sustainability embedded in their core values and marketing practices	Embraces social, environmental and economic health to create opportunities to lead “happy and fulfilling” lives	“Better business” specifically designed to reverse climate change – “making better things in a better way”	To leave the planet better than it is now by creating ethically made products using sustainable fabrics with a circular design focus
(3) Mix of different sustainability pillars and issues (i.e. environmental, social, wellbeing) underpinned by strong purpose among the selected brands	Primarily social sustainability and wellbeing (individual and community) Embraces environmental and economic aspects	Primarily environmental sustainability – certified B Corp Includes some social and economic aspects and Committed to transparency	Primarily environmental Committed to fair and ethical practices for all stakeholders
(4) Brands posted content regularly on their Instagram accounts about sustainability issues	Yes Personal wellbeing Social wellbeing Global	Yes Environmental sustainability	Yes Environmental sustainability
(5) There was a mix of global and local retailers among the selected brands	Global	Global	Local
Source(s): Authors’ own work			

method could not adequately capture the relational and emergent dynamics across cases. Instead, insights from Phase 1 highlighted the need for a coordinated, layered, multi-method design, where subsequent phases could build on initial constructs, triangulate findings and incorporate diverse perspectives. The flexibility inherent in the Eisenhardt Method – which emphasises theoretical sampling and construct refinement – reinforced the importance of sequencing and integrating multiple qualitative methods to achieve depth, rigour and theoretical robustness in studying complex phenomena.

Phase 2 – Social media (Instagram) post-analysis. *How did we decide what this phase involved?*

The objective of Phase 2 was to understand in detail what consumers were seeing on the SF retail brands' Instagram accounts that might be contributing to their engagement with those brands' sustainability messaging. Data collection involved one of this paper's authors recording all of the publicly available brand generated content (BGC) Instagram posts by each brand over a six-month period (1 January 2020–30 June 2020), including the date of each post and descriptions of the text and images in each post (including video, still shots and multiple still shots in a loop). Text descriptions of the images and text were analysed using content analysis and a code-recode procedure (Krefting, 1991), whereby initial codes, particularly around sustainability, were generated by one author and subsequently independently checked by the other two co-authors. All data were open-coded, looking for patterns, similarities and differences within and across the three brands (Miles and Huberman, 1994). Inter-coder reliability was supported through a cross-checking process in which all three co-authors compared decisions about the initial codes, resulting in high agreement across the research team. The use of multiple researchers enhances the creative potential of the study, and the convergence of multiple researchers enhances confidence in the findings, according to Eisenhardt (1989). Together, all three authors generated key themes using a deductive approach to analyse the data based on the initial codes and informed by the literature, particularly regarding the key pillars of sustainability (social, environmental, economic) and sustainability marketing.

Why was this phase important?

Instagram is the most used platform among consumers, with over 2 billion active monthly users by 2024 (Zote, 2024). Given that consumers use the platform extensively to research brands, Instagram's visual functionality/presence makes it particularly important to fashion retailers (Bonilla *et al.*, 2019). Consequently, we considered Instagram to be an important social media marketing platform to study in relation to sustainability messaging. As clothing and footwear retailing is highly seasonal (Tyler *et al.*, 2006), a six-month sampling period was chosen to avoid short-term effects and to capture a wide variety of post content.

What did we learn in this phase?

We found that the SF retail brands offered content and messages relating to four key areas: (1) sustainability issues, both environmental and social sustainability (personal and social wellbeing); (2) brand values; (3) transparency related to sustainability; and (4) conscious consumption. Phase 2 findings were critical to the development of Phase 3, enabling us to develop a more refined method that ensured we gathered appropriate and relevant information related to each brand. Our plan for Phase 3 was to conduct interviews with enthusiasts of each brand to gain insights into how consumers co-create sustainability. When thinking about the design of the next phase, we reflected on the importance of choosing certain types of posts as stimuli, given the different types of messages and post content that had been revealed in the analysis of Phase 2.

Our progression in Phase 2 highlighted how imperative it is for research teams to be open to emergent ideas when developing a phased qualitative research process that aims to build

theory. Significantly, the results of Phase 2 empowered the research team to drill more deeply into the influence of Instagram on the participants' sustainability behaviours. With these insights, we were then able to focus Phase 3 on real posts that participants had seen (and were mostly likely to be able to recall) and could provide responses to.

Reflection

Phase 2 demonstrated the value of incorporating visual and textual analysis to capture how sustainability messaging is communicated through social media. By systematically analysing Instagram content, we uncovered nuanced patterns in brand narratives – such as transparency, conscious consumption and sustainability values – that would have been difficult to identify through interviews alone. This phase highlighted the importance of using multi-methods in addressing different dimensions of complex phenomena; while Phase 1 provided theoretical constructs, Phase 2 offered empirical insights into the mediated context in which consumers engage with sustainability. The findings informed the design of Phase 3 by enabling us to select relevant stimuli for interviews, ensuring alignment between observed brand practices and consumer interpretations. Reflecting on this process reinforced that a coordinated, multi-phased design is essential for theory building, as each phase adds depth, triangulates insights and adapts to emergent findings.

Phase 3 – Consumer interviews using visual methods. *How did we decide what this phase involved?*

The third phase of our research was designed to investigate how consumers engage with SF brands on Instagram, and how this influences their attitudes and behaviours around sustainability, enabling co-creation of sustainability and a move towards sustainable futures. We decided to conduct semi-structured interviews with consumers who were followers of the brands' Instagram accounts, using an auto-driving interviewing technique to collect data (Heisley and Levy, 1991).

Thirty self-confessed enthusiasts of our three brands (i.e. 10 participants per brand) were recruited in New Zealand in two major cities, Auckland and Wellington. Convenience sampling was adopted by drawing on the researchers' existing professional networks, as this approach provides rapid access to information-rich participants, and subsequent snowball sampling enabled these initial participants to identify further relevant respondents, a strategy commonly recommended for hard-to-reach or specialised populations (Obilor, 2023). Recruiting participants who were enthusiasts of sustainable brands and active followers maximised the chances of uncovering insights into how consumers engage with SF brands on Instagram and how this influences their sustainability-related attitudes and behaviours.

Hour-long interviews were carried out between September 2020 and February 2021 via Zoom. Zoom proved to be a useful technique for qualitative research during the COVID-19 pandemic, overcoming the restrictions of lockdowns and social distancing, and was an appropriate way to obtain data easily (Dodds and Hess, 2020). Our interview discussion guide started by asking participants about their shopping and social media habits. The interviews then proceeded to focus on the brand enthusiasts' experience and knowledge of their chosen brand and its social media activity. The next part of the interview protocol used a visual method, and finally participants were given the opportunity to offer their vision for the future of sustainable consumption. Formulating the interview questions in an hour-glass approach (Kriner and Goulet, 1983) was effective. We deliberately started with broad, easy questions, and then narrowed to focus specifically on their chosen brand and its social media activity, before finishing with a broad question that prompted consideration of a future "vision".

The interviews were recorded and resulted in 393 pages of transcripts. A standard qualitative inductive-deductive iterative process of analysis was implemented to identify key

themes in the interview data (Fereday and Muir-Cochrane, 2006). Data analysis firstly involved an iterative inductive process that included multiple readings of the transcripts by the researchers, followed by individual open-coding and axial-coding to identify themes in the data. Subsequently, the researchers deductively compared notes and consulted key literature to produce a single set of theoretically sound themes from the data set (Spiggle, 1994; Strauss and Corbin, 1990).

Why was this phase important?

In preparation for the visual auto-driving interview method, the researchers selected four “typical” sustainability-orientated Instagram posts for each brand using the data and findings identified in Phase 2. It is important to note that the posts chosen were “real” Instagram posts from each of the brands and not posts made up by the research team for manipulation purposes. In a study such as this, where qualitative research aims to build theory while having strong foundations in “real-world” sustainability marketing, it is important the data are derived from actual brand consumers and examine a range of actual brands and their recent marketing communications.

A visual method was introduced to the interview protocol to help us understand more about the influence of social media messaging on sustainability behaviour, following on from Phase 2 where we identified that Instagram was used extensively by all three brands to communicate messages about sustainability issues and promote sustainable consumption. The chosen posts were shared via PowerPoint on-screen by the interviewer, who asked the participants about their opinions and feelings and what they thought each post was trying to communicate. The four sample posts from each brand were purposely selected as auto-drivers to explicitly inspire participants to reflect on their consumption of the posts and to encourage them to explain their responses (Heisley and Levy, 1991).

The use of a visual technique was especially appropriate in a study of consumer engagement with a visual social media platform, and it enabled research participants to articulate richer insights than might have been elicited using other interview techniques (Rokka and Canniford, 2016; Rose, 2016). Furthermore, combining visual imagery and an auto-driving task with other interview techniques had the potential to create new knowledge in a previously unexplored area (Pink, 2007). This step enabled us to gain deeper insights into sustainable consumption behaviours that would potentially lead to co-creating sustainability from the consumers’ perspective.

What did we learn in this phase?

In Phase 3, we identified three overarching ways that consumers co-create sustainability: (1) reorientating for a sustainable future – the participants reorientated towards sustainability through knowledge co-creation which involved both the brands disseminating information on Instagram and the consumers acquiring knowledge from the brands, and the brands encouraging consumers to be active regarding sustainability; (2) aligning values – the participants, through engaging with the brands, were consciously aligning their personal values with the brands’ values around sustainability, and were belonging to a brand community that espouses sustainability; and (3) consuming consciously – the participants were making conscious choices, e.g. buying less, being aware of where products come from, self-educating about being sustainable and developing a renewed focus on sustainable brands.

Phase 3 provided us with the final impetus to begin building theory around how brands and consumers co-create sustainability leading to sustainable futures. The findings from this and the previous two phases were used to develop a framework through an iterative process, going back and forth between the literature and the findings. The first iteration involved the research team brainstorming how the findings from each phase linked together cohesively.

The second iteration involved one of the researchers building a visual diagram to show the key findings, depicting the interrelationships between brand sustainability co-creation, consumer sustainability co-creation and the role of Instagram. The third iteration involved the team critiquing and making small refinements to the diagram. The fourth and final iteration was Phase 4 of our research: the model validation process.

Reflection

Phase 3 reinforced the value of integrating visual methods in interviews to gain deeper insights into consumer engagement with sustainability messaging. Using real Instagram posts as auto-driving stimuli enabled the participants to articulate nuanced interpretations and behaviours that would not necessarily have emerged through conventional questioning. This phase demonstrated how layering methods enhances richness and theoretical depth, while coordination across phases – drawing on insights from Phase 2 – ensured relevance and continuity. Ultimately, Phase 3 confirmed that a multi-phased, adaptive design is essential for capturing the relational and co-creative dynamics of sustainability marketing.

Phase 4 – Feedback focus groups. How did we decide what this phase involved?

The objective of the final phase of our study was to introduce an additional measure designed to build trustworthiness, rigour and quality in the theory development process.

Fourteen of the original 30 participants agreed to participate in Phase 4, resulting in four focus groups. Feedback was gathered from the 14 participants, who reflected on their earlier contributions and elaborated on what they had previously discussed regarding how brands had the power to create sustainable futures. Although we would have liked to have gained feedback from all of the participants, we are confident that feedback from almost half of the initial participants was sufficient to refine our framework. However, Phase 4 did highlight how difficult it is to engage research participants in multiple phases, particularly due to time constraints. Despite offering some compensation (a NZD50 voucher), recruitment was a challenge, especially for this final phase which required a greater amount of thought and reflection on the part of the interviewee.

Two researchers conducted the focus groups together, with one researcher presenting the framework, and the other researcher acting as a moderator to ensure all participants' voices were heard and no points were missed. The moderator was also able to interpret body language and, if necessary, message the main facilitator via private chat on Zoom. However, moderating in a Zoom environment also posed challenges, such as managing delayed audio cues, and the reduced visibility of non-verbal signals when participants had their cameras off, requiring the moderator to be more deliberate in inviting contributions. The structure of the focus group followed a specific format using a discussion guide. The participants were first advised of the focus group's purpose and re-briefed on the research phases. Given that the participants had only been involved in Phase 3, it was essential at this point to explain the overall process of the research to them so that they could comment on the entire framework which had also been built from insights gathered in Phases 1 and 2. Subsequently the moderator presented and explained each aspect of the framework (see [Figure 2](#)), and then the groups discussed each "piece" in turn, until the complete framework was revealed. Findings relating to each element of the draft theoretical framework were outlined, and then the groups were asked questions relating to each element.

Careful decisions were made about the structure and flow of the focus groups, particularly relating to the revelation of the framework and which parts to start with first. The presentation began with "messaging on digital platforms" – the findings from Phase 2. Our decision to start here was because this element formed the centre of our framework, and we also believed it would be a relatively simple and accessible place to begin discussion. The participants were asked to comment on whether the four categories represented how they

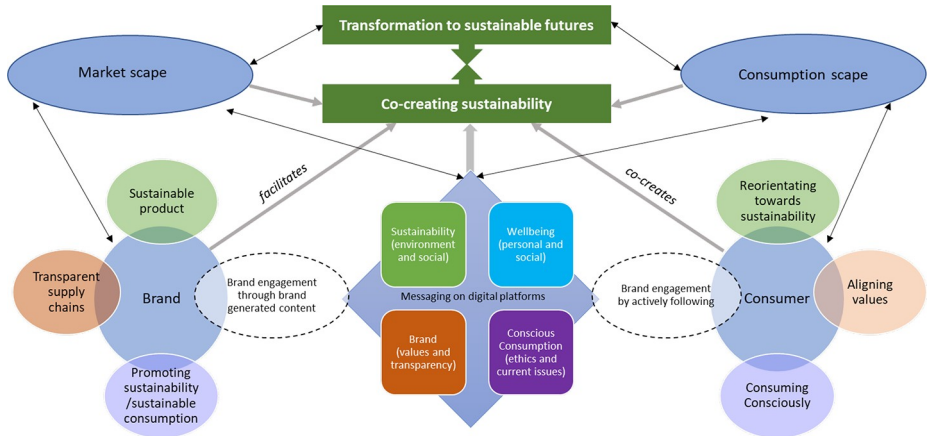


Figure 2. Draft framework presented in Phase 4

Source: Authors' own work

experienced the brand posts on Instagram, and if there were any categories missing. They were also asked what their thoughts were about the power of a brand (that has sustainability at its core) to generate change (transformation) towards sustainable futures through social media platforms like Instagram. This final question provided us with deeper insights regarding the transformative nature of brands and enabled us to understand more clearly the link from co-creating sustainability to transformation towards sustainable futures.

The “consumer” element of the framework was then presented and discussed. We intentionally chose this next, because the participants had been involved in this phase and it was a natural progression to move to findings of direct relevance to them. The participants were asked to comment on whether the categories represented how they experienced engaging with SF brands, and whether there were any other ways sustainable values and behaviours could be facilitated through engaging with a SF brand. Then, we encouraged the participants to reflect on how they contributed to sustainable futures by engaging with sustainable brands. As above, this question helped us gain deeper insights regarding the link from co-creating sustainability to transformation towards sustainable futures.

We then introduced the “brand” element and findings. This element was introduced here as it made sense to complete the consumer–brand engagement connection of the framework. The participants were asked whether the three brand co-creation marketing practices represented how they experienced sustainable brands. They were also asked whether there were other ways that brands could facilitate the co-creation of sustainability and progress towards sustainable futures.

After presenting the three key elements – digital platforms, consumer and brand – we introduced the consumer and market consumption scope elements. We explained how the framework operates within an ecosystem with two important “scapes”: consumer and market scapes. We elaborated on the “scapes” analogy to ensure the participants understood it. A market scape considers all of the various aspects of operating within a complex market (political, legal/regulatory, economic, socio-cultural), while a consumption scape considers all of the aspects relating to consuming (socio-cultural, consumption trends, values/beliefs, ethics/morals). We then asked the question: “Given these two scapes, when making decisions

about what brands/products and services to consume/purchase what other aspects influence you?”

Next, we displayed the co-creating sustainability element, and arrows depicting consumer co-creating and brands facilitating sustainability. We elaborated on our proposal that consumers can co-create sustainability through reorientating, aligning and consuming consciously, and that brands facilitate the co-creation of sustainability through having a sustainable product and transparent supply chains, and promoting sustainability/sustainable consumption, particularly through messages on digital platforms. The following question was then asked: “What are your thoughts so far about these relationships and our proposal?”

Finally, we presented the transformation to sustainable futures element, revealing the entire framework – co-creating sustainability leads to a transformation towards sustainable futures, in turn influencing market and consumption scapes, which influences brands and consumers. We then asked the questions: “What does a sustainable future look like to you? Now looking at the framework as a whole, what are your thoughts? How could it be improved?”

Why was this phase important?

Phase 4, the final layer of our study, was particularly important in verifying our findings, synthesising our framework, and thus ensuring solid theory development. A crucial component in implementing the last of the multiple methods involved presenting the key findings and draft theoretical framework “Co-creating sustainable futures” (Figure 2) to the Phase 3 participants. The focus groups’ feedback supported a form of member-checking and follow-up. According to Lincoln and Guba (1985, p. 314), “the member check, whereby data, analytic categories, interpretations and conclusions are tested with members of those stakeholder groups from whom the data were originally collected, is the most crucial technique for establishing credibility”. However, in marketing and consumer research studies this procedure is rarely reported.

Reflection

Phase 4 was pivotal in validating our emergent framework and enhancing trustworthiness through member-checking. By engaging the participants in the focus groups to critique and refine the model, we ensured that our theoretical propositions resonated with lived experiences and captured the complexity of consumer–brand co-creation. This phase reinforced the importance of incorporating feedback loops within multi-phased designs, not only to strengthen credibility but also to adapt and refine theory iteratively. Despite recruitment challenges, the process confirmed that coordinated, layered designs – culminating in participant validation – are essential for building robust theory in complex marketing contexts.

As Supphellen (2000) notes, some of the biggest challenges with qualitative elicitations are gaining access to hidden meanings, helping respondents verbalise their ideas, mitigating response censoring and validating reported meanings. The advantage of focus groups over face-to-face interviews is that each speaker provides a platform for another to contribute, with opportunities for ideas and views to snowball and develop more depth (Blackburn and Stokes, 2000). It was with this in mind that focus groups were chosen as an alternative data-collection setting to individual participant interactions.

This fourth phase was critical for both member-checking and theory building. It served to ensure the correct portrayal of the participants’ voices by allowing participants to comment on the accuracy and interpretations of data (Candela, 2019). The audio-recorded sessions were used to refine the framework, and text units from the focus groups were analysed as part of the overall data set for the study. Importantly, Phase 4 was an essential step that enabled the development of the key constructs that were part of our framework. As a result of the

Phase 4 findings, small refinements were made to the visual framework, primarily revolving around simplifying the relationships between the elements (see Figure 3).

What did we learn from this phase?

Theory development around the construct of “co-creating sustainability” leading to a “transformation to sustainable futures” was a significant component of this phase. Although the prior phases provided some indication of the link between co-creating sustainability and transformation towards sustainable futures, this phase offered an in-depth understanding of that link which had previously been missing in our data.

Multi-phase, multi-method qualitative market research framework

Based on reflections across all four phases of our research design, we developed a multi-phase, multi-method qualitative market research framework for studying complex phenomena in marketing (see Figure 4). This framework emerged from the iterative evaluation of how each phase contributed unique insights and highlighted the need for methodological strategies that capture relational, emergent and dynamic processes. From this reflection, we identified three guiding principles essential for qualitative inquiry in complex contexts: coordination (ensuring alignment across phases and methods), layering (sequencing methods to build depth and theoretical richness) and multi-method integration (combining complementary methods to enhance rigour and triangulation). These principles provide a foundation for marketing scholars seeking to design research that addresses the complexity of contemporary marketing phenomena.

Coordination

Coordination advocates for a structured design that is systematic (Gioia et al., 2013). This is particularly critical when researchers are designing research to generate theory from the data (Eisenhardt, 2021). The principle of coordination ensures that the research design: clearly defines the context and constructs it is examining; develops well-defined research questions;

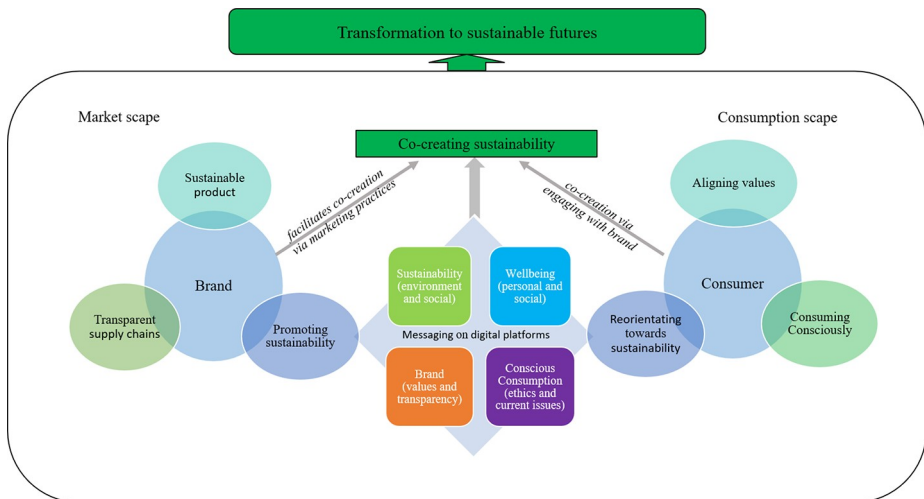


Figure 3. Final framework after refinement

Source: Authors’ own work

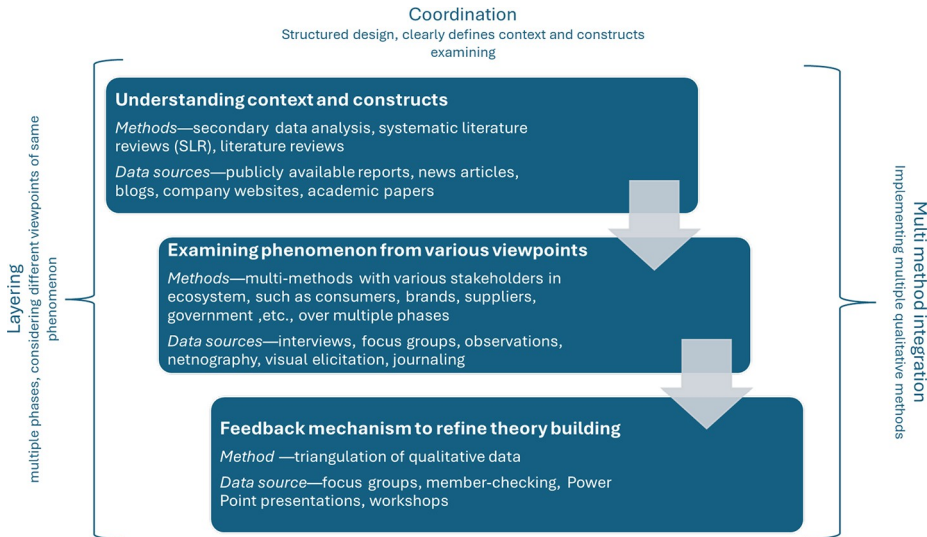


Figure 4. A multi-phase, multi-method qualitative market research framework for studying complex marketing phenomena

Source: Authors' own work

has clear criteria for case and participant selection; considers carefully the methods and techniques employed; develops theory/constructs throughout the research process; and has feedback mechanisms to refine theory development (Eisenhardt, 2021).

When researching complex phenomena, coordination provides a systematic and structured framework that manages complexity with rigour (Gioia *et al.*, 2013). It ensures that the research clearly defines the context and the key constructs, which is essential for unpacking multifaceted issues. Focus is maintained within the complexity by having well-articulated research questions and precise criteria for case and participant selection. The careful selection of methods and techniques leads to appropriate data collection strategies that are tailored to the nuanced nature of complex phenomena. By developing theory iteratively throughout the research process and incorporating feedback mechanisms, coordination supports a dynamic refinement of conceptual frameworks, enabling deeper understanding and robust theory generation in the face of complexity. Scholars recognise the importance of this type of qualitative inquiry in investigating complex phenomena and big challenges (Kistruck and Shantz, 2022; Levitt, 2021).

Layering

Layering is a principle that encourages the research process to unfold in multiple phases, each addressing different perspectives or aspects of the focal phenomenon. In this design, each phase builds on the foundations established in the previous phase. Studying complex phenomena benefits from such a sequential, multi-perspective process, as it allows insights from diverse viewpoints to be integrated, leading to a richer understanding of complex ideas and constructs.

Layering begins by building a solid foundation through understanding the context and key constructs, using methods such as secondary data analysis, systematic literature reviews

and broader literature reviews. Central to the principle of layering are phases that engage diverse stakeholders across the ecosystem – such as consumers, brands, suppliers and government representatives – over several qualitative stages, depending on the context and research aims. Scholars have called for qualitative methods that consider various perspectives, which can then be used to study challenges involving multiple stakeholders and characterised by inherent complexity and uncertainty (Ferraro *et al.*, 2015; George *et al.*, 2016). We recommend at least two phases, including macro-level actors (e.g. government, policymakers, business network organisations, etc.), meso-level actors (e.g. organisation founders/managers, suppliers, non-government organisations) and/or micro-level actors (e.g. consumers, families, employees). Importantly, we propose incorporating a dedicated feedback mechanism phase to validate the findings and strengthen any concept development.

Layering offers several key benefits. Firstly, by engaging diverse stakeholders across multiple qualitative phases, it captures a wide range of perspectives, ensuring a holistic view of the phenomenon. Secondly, it allows researchers to adapt their methods and focus as new insights emerge, enabling a nuanced exploration of complex constructs. Thirdly, implementing a feedback mechanism for theory refinement allows iterative validation and adjustment, improving the accuracy and relevance of the developed concepts. Overall, this principle provides flexibility, depth and credibility through a layered inquiry.

Multi-method integration

Qualitative multi-methods that combine two or more qualitative methods – such as interviews, focus groups, observations and document analysis – can capture diverse perspectives and thus generate a richer, more nuanced understanding of a phenomenon (Crick, 2021). With qualitative research often criticised for not being reliable, credible and dependable, qualitative researchers must ensure that any data they produce are of high quality data, and address these criticisms and potential shortcomings (Sinkovics *et al.*, 2008). Incorporating multiple methods can help achieve this goal by addressing issues about subjectivity and the adequacy of data in terms of the quantity and quality of information (Morrow, 2005). Methods can include using secondary data alongside primary methods, which include interviews, focus groups, observations and using techniques such as visual elicitation, diaries etc. Also of note in a marketing context are data collected and analysed from social media platforms.

Specifically, using multi-methods can aid triangulation, with collecting and analysing data from multiple primary and/or secondary sources producing richer information, reducing bias and ensuring the credibility of the data set (Crick, 2021; Gioia *et al.*, 2013). Triangulation through the use of multi-methods can also help develop a comprehensive understanding of the phenomenon being studied (Patton, 2001). Although single qualitative methods have their place in social science research (Crick, 2021), we argue that for exploring complex issues like sustainability and sustainable ecosystems, multiple qualitative methods be used because of the stronger results that flow from drawing on multiple perspectives.

Researcher implications

For qualitative researchers investigating complex phenomena, implementing the principles of coordination, layering and multi-method integration offers significant methodological advantages. *Coordination* provides a systematic framework that keeps the study focused, ensures conceptual clarity and supports rigorous theory development, even when the research setting is multifaceted and dynamic. *Layering* enables researchers to progressively build understanding – starting with contextual and theoretical grounding, moving through successive phases of stakeholder engagement and culminating in

feedback-driven refinement – thereby capturing both breadth and depth over time. *Multi-method integration* enriches the data by drawing on complementary techniques that reveal different dimensions of the phenomenon, enhancing validity through triangulation. Together, these principles equip researchers to manage complexity, adapt flexibly as insights emerge and develop well-founded, contextually grounded theories that can advance marketing scholarship and practice.

Conclusions, limitations and future considerations

Our *multi-phase, multi-method qualitative market research framework* for studying complex phenomena in marketing is intended to offer guiding principles for qualitative marketing research. Its value lies in providing a structured yet adaptable design that can be tailored to diverse empirical domains – particularly those characterised by relational complexity, multiple actors and multi-platform dynamics, or where scholars seek a multi-angle perspective on marketing phenomena. By highlighting both its transferable strengths and its limitations, we present this framework as a practical and reflective set of design principles – one that supports scholarly inquiry into complex marketing issues without claiming to offer a one-size-fits-all solution.

While a multi-method, multi-phased qualitative design offers rich insights and methodological rigour, it also presents several limitations. Such studies are resource- and time-intensive, requiring careful planning, coordination and analytical effort. Integrating diverse types of qualitative data across the various methods and phases can be complex, and there is a risk that the depth of individual methods may be compromised if resources are stretched. Additionally, repeated or varied interactions with participants may increase participant burden and raise ethical considerations. We also acknowledge that modifications may need to be made when applying this framework across different settings, such as research involving marginalised communities or cross-cultural marketplace dynamics. Finally, communicating and reporting a complex, multi-phased design can be challenging, requiring careful structuring to ensure transparency and reader comprehension.

Nevertheless, the framework we present provides a platform for developing research designs for complex phenomena. We encourage qualitative researchers attempting to study complex phenomena to use the three principles of layering, coordination and multiple method integration as a foundation for developing their own research, albeit adapting them to their own contexts and research problems. Although our research focused on sustainability, we believe our framework is versatile and can be applied in a variety of other marketing and business-related contexts where rich, complex and layered understanding is needed. We conclude by offering some examples of potential areas of application.

Consumer behaviour: Using the framework when studying brand engagement, co-creation or lifestyle practices in emerging markets or new product categories enables iterative, in-depth exploration of evolving behaviours and preferences. By combining multiple qualitative methods across iterative phases, researchers can capture evolving consumer behaviours, motivations and preferences in rich detail. The phased design supports exploring how consumers interact with brands over time, uncovering both explicit actions and underlying attitudes that may shift across contexts or stages of adoption. Additionally, the design facilitates the identification of emerging trends, patterns of behaviour and nuanced differences across consumer segments, providing insights that can inform strategy, product development and marketing communications in dynamic or complex markets.

Technology adoption and digital innovation: When trying to gain an understanding of how users interact with new technologies, platforms or services, using our framework

enables researchers to capture user interactions and experiences over time, providing a rich, longitudinal perspective on how engagement evolves. By combining multiple qualitative methods, such as interviews, observations and netnography, researchers can uncover both explicit behaviours and underlying motivations, as well as the contextual factors influencing adoption. The phased design also enables iterative refinement of data collection and analysis, helping to identify emerging patterns, barriers and opportunities for improving user experience, product design or platform functionality.

Social, cultural and community issues: Future research could extend our framework to better address complex social issues, such as social inclusion, marginalised communities and culturally diverse marketplace dynamics, by incorporating participatory or community-engaged methods that ensure cultural sensitivity and local relevance. Individual phases could be adapted to include culturally-embedded data-collection techniques, such as using community-based conversations, storytelling traditions, culturally-mediated interviews or observation within everyday cultural settings. Co-design with cultural intermediaries may help researchers capture diverse perspectives and underlying community dynamics more effectively. Studies across different cultural or geopolitical contexts could identify which aspects of the design transfer well and which require modification. Comparative applications may further reveal ethical considerations and context-specific constraints, helping refine the framework for use across varied marketing contexts.

Ecosystems: The framework could be used in investigating how organisations adapt to change, implement new policies or co-create knowledge across ecosystems. Capturing multiple perspectives across iterative phases would provide insights that could support more effective collaboration, innovation and strategy development.

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