

## **How Anthropologists Can Succeed in Business: Mediating Multiple Worlds of Inquiry**

**Robert J. Morais**  
**Weinman Schnee Morais Inc.**

**Timothy de Waal Malefyt**  
**BBDO Advertising and Parsons (New School for Design)**

*Marketing research and advertising strategic planning offer viable and financially attractive career options for anthropologists because many businesses seek deep understandings of consumer lifestyles and brand use. As professionally trained anthropologists operating in the corporate world, we see a bright future for anthropologists, but we believe that there are merits in broadening the typical anthropological approach to incorporate additional theory and methods from other social and behavioral sciences, particularly psychology. The embrace of other perspectives by anthropologists in marketing and advertising is essential because executives in these businesses use principally psychological models of human agency that view consumers as operating on individualistic levels. Although marketing and advertising executives are generally aware of the interaction of culture, behavior, and attitudes, they are often indifferent to this process. This can stoke contentious debates between anthropologists and their clients. We suggest that business anthropologists must learn the language and culture of their corporate clients, as they would learn the language and culture of their informants in the field. In the process, they will better connect with clients' ways of thinking and improve their own chances of business success.*

### **INTRODUCTION**

In a review of two combating books on Captain Cook's life and death in the Pacific, Clifford Geertz notes;

Anthropology is a conflicted discipline, perpetually in search of ways to escape its condition, perpetually failing to find them...fissures within cultural anthropology as such, the heart of the discipline, have proved increasingly prominent and less easy to contain. (Geertz, 1995, p.4)

This paper addresses one such conflict and, not incidentally, the specific cultural/psychological conflict that Geertz describes in his book review. What is curious is how this conflict plays out today, not only in the halls of academia, but also in the world of business.

### **Anthropology in American Business**

The presence of cultural anthropology as a research methodology in American industry has expanded dramatically over the past decade. A range of works now address the rise of anthropology as a methodology for business research and as a way of looking at how businesses function, many with special attention to marketing and advertising (Baba, 2006; Cefkin, 2009; Jordan, 2003; Malefyt, 2009; Malefyt and Moeran, 2003; Malefyt and Morais, forthcoming; McCracken, 2009; Moeran, 1996, 2005, 2006, 2009, 2010; Morais, 2007, 2009a, 2010; Schudson, 1984; Squires and Byrne, 2002; Sunderland and Denny, 2007; Tian, 2005; Tian and Walle, 2009; Wasson, 2000; Zukin, 2005). In the United States, anthropologists can be found in manufacturing companies, advertising agencies, consulting firms and other business enterprises engaged in new product development, communications research, design, and strategic planning, among many job functions. American industry offers a viable and financially attractive career option for anthropologists because many businesses seek deep understandings of consumer lifestyles and brand use. As professionally trained anthropologists operating in the corporate world, we see a bright future for anthropologists, but we believe that there are merits in broadening the typical anthropological approach to incorporate additional theory and methods from other social and behavioral sciences, particularly psychology. Through our own careers in marketing and advertising research, we have experienced the use of psychology as the core method and analytical framework for understanding consumer behavior. In our work at different companies, one a marketing research firm, the other an advertising agency, we integrate both psychological and anthropological approaches. That is what our clients want, need, and expect. Beyond arguing for theoretical and methodological integration of approaches that are psychological and anthropological, we see this tactic as a kind of advanced applied anthropology, working, as it were, between two or more distinct cultures with different perspectives.

The contrasting of perspectives in business, and specifically in the marketing and advertising industries, are represented by anthropologists who think and do anthropology *per se* (often ethnography in business practice) and their clients, manufacturers and advertising and design agencies, who think mainly in terms of psychology (Sunderland and Denny, 2003, p.190-191). We, along with Sunderland and Denny, observe that marketing and advertising executives use principally psychological models of human agency that view consumers as operating on individualistic levels. This perspective corresponds to marketing models of purchase decision-making and the ways that marketers and advertisers appeal to consumers through advertising, package design, price incentives in coupons, retail store shelf placement, and so on. To access consumer attitudes and behavior, marketing and advertising professionals typically rely on psychological tools. This process ranges from the explicit application of psychological theories such as Maslow's *Hierarchy of Needs* (Malefyt, 2003; Maslow, 1968), to questions that are asked of respondents regarding individual perception, intention, and behavior, which rely on methods such as personal histories and projective techniques. As anthropologists, we know that consumers are subject to cultural systems, beliefs, and values that impact their cognition and behavior (McCabe and Malefyt, 2010). Although marketing and advertising executives are generally aware of the interaction of culture, behavior, and attitudes, they are often indifferent to

this process. Their research and strategic planning methodologies are constructed as if consumers select goods for themselves and others from an individualized mode. Even when marketing and advertising companies hire anthropologists to conduct ethnographic studies, as Sunderland and Denny point out, ‘...ethnographic inquiry is too often embraced as a means to obtain a deeper psychological understanding of a target audience’ (2003, p.188). This way of thinking can stoke contentious debates between anthropologists and their clients.

In fact, Sunderland and Denny speak of marketers and anthropologists as ‘talking past’ one another (2003, p.188). We are not surprised. We have experienced the same discursive incongruence and, in our work, we have developed ways to ameliorate the problem. This is the heart of the matter at hand. Business anthropologists must learn the language and culture of their corporate clients, as they would learn the language and culture of their informants in the field. In the case of marketing and advertising, practicing anthropologists should integrate psychology with anthropology to create hybrid research methods and analysis that will serve the business problem and the anthropologist-client business relationship. We will illustrate our argument by showing how, as anthropologists in corporate America, we mediate between and among multiple cultures. We intend to convey that our integrated approach relies on anthropological skills of listening, interpreting, and conversing across and between modalities. As we converge disciplines, we bridge the domains of business and anthropology. In the process of learning about our respondents’ ways of thinking and being, we better connect with our clients’ ways of thinking and being. We contend that anthropologists in business who retain their “pure” anthropological perspectives without regard for their clients’ perspective risk their business jobs and, in fact, are not practicing as anthropologists should – as keen observers and navigators of different cultures.

Despite the penchant in marketing and advertising for psychological analysis, anthropologists seem reluctant to expand their anthropological perspective. These anthropologists, like Sunderland and Denny (2003), frame their work in marketing research as a disciplinary prizefight: psychology versus anthropology. From our perspective, rather than stress disciplinary competition, we propose that difference be seen in terms of complementarity, and have attempted to educate industry in this regard (Morais, 2009b). We also suggest, and will illustrate, that a means to expand anthropology’s contribution to business is to convince industry that anthropology is about more than just ethnography; it entails a way of observing behavior and asking questions, even in a focus group or other research and analytical settings (cf. Morais 2010). As we incorporate both psychological and anthropological modes of inquiry, we find that many business executives, indifferent to academic theory, welcome any perspective that will gain them access to the ways their customers think and behave. Through our convergent methodology and analysis, we secure both consumer insights and client acceptance.

### **Anthropology and Psychology: A Brief History**

During anthropology’s formative years, culture and personality was a dominant sub-field, stimulated by the early work of Mead (1928) and Benedict (1934) and later by Kardiner and his associates (1945), Whiting and Child (1953), Hallowell (1967, org. 1955), and Sapir (1970), among others. By mid-century, culture and personality suffered critical blows (Bock, 1980, p.131). Unbowed, but certainly influenced by critics, anthropologists produced a spate of books during the 1960’s and 1970’s on culture and personality, its successor in name, psychological anthropology, and the related sub-discipline of cognitive anthropology, (see, for example, Barnouw, 1973; Cole and Scribner, 1974; Hunt, 1967; Hsu, 1972; Levine, 1973, 1974; Spradley,

1972; Tyler, 1969; Wallace, 1961). These schools of thought were not immune to additional reevaluation (Harris, 1968; Shweder, 1979a, 1979b, 1980), but evidence that psychological and cognitive anthropology remained vibrant through the 1980's and 1990's is found in publications by Shweder and Levine (1984), Schwartz, et al. (1992) and D'Andrade (1995), among others, and in more recent work by and Shweder (2003) and D'Andrade (2008) along with the enduring vitality of *Ethos*, the journal of the Society for Psychological Anthropology (<http://ethos.anthro.illinois.edu>).

The theories and research techniques of psychological and cognitive anthropology have much to offer business, especially marketing and advertising, as do methods and concepts from psychology that anthropologists have not typically used, e.g., deprivation scenarios, personification as a projective technique, locus of control, mindfulness, cognitive dissonance, and so forth. In our work, we have found that marketing and advertising executives value a close examination of the relationship between culture driven beliefs, rituals, and classification systems and consumer perceptions, attitudes, and purchase motivations. The convergence of disciplines informing this examination is an evolutionary step for psychological anthropology that will help advance the sub-discipline and secure livelihoods for anthropologists who choose to engage in business practices.

#### **ANTHROPOLOGISTS AND CLIENTS: A WAY TOWARD MEDIATION**

For anthropologists to bridge the cross-cultural gap that we have described, they must accept a duality in their role. They must retain their identity as anthropologists able to make contributions in a business setting and they must also incorporate the perspective of their clients who pay the bill for their research. The following case study illustrates the need for duality in an advertising agency-client relationship, one similar to the anthropologist-client relationship.

The president of an American advertising agency was under extreme pressure. He was informed by his agency's largest client the previous day that the account was being placed in review, meaning that the client intended to ask competing agencies to 'pitch' for the assignment. His agency had much to lose, and the president called a meeting with senior account management and creative staff to determine a plan of action to protect their assignment. He explained the conditions of the competitive pitch. All of the participating agencies would present creative work written to the same strategy, the work would be tested among consumers, and the assignment would be awarded to the agency whose creative work achieved the best test scores. He noted, plaintively, that he "saw this coming" because the client had expressed dissatisfaction with recent agency creative work and the interpersonal chemistry between senior agency and client executives was increasingly poor. He said he considered resigning the account, but felt that the future of the agency would be in jeopardy. He contended that the agency had an opportunity to demonstrate their superior understanding of the client's brand and surprise the client with winning work. As he ended his summary of the position the agency was now in, the president said that one of the reasons the agency was in this predicament was because they had been not been sensitive enough to the client's way of doing business. He underscored that agency executives' relationships with the client were tense and creative

presentations had not gone well in recent months; even when creative ideas were sold to the client, the client did not seem happy. Then the agency president said, 'We have to be like them and not be like them'. He meant that, to win back the client's loyalty, the agency needed to do a better job of understanding and adapting to the client's corporate culture, their interactional style, their operational processes, and the kind of creative work that they were most likely to accept. At the same time, he said, the agency must demonstrate a distinctive creative voice; otherwise why would the client retain them? After this meeting, the agency went to work. They tried to deliver on the president's objectives. However, after several months, the agency lost the account to a competitor.

The agency president's phrase – "We have to be like them and not be like them" – expresses the duality that anthropologists engaged in marketing research must practice. Business anthropologists must "be like them" in that they must learn and function effectively within their client's culture or risk alienating them. At the same time, business anthropologists must "not be like them" and retain their distinctive professional identities, which provides value to their clients. We know from our experience that an effective way to attain this duality in marketing and advertising research projects is to accept the notion of a convergence between clients' psychological mode and our own cultural perspective. This duality is not duplicitous; it is a way to mediate the cultural divide that otherwise leads to anthropologist-client contentiousness and, ultimately, incompatibility.

## **CONVERGENCE IN ACTION**

To illustrate our argument, we have selected two case studies from successful projects that each of the authors has managed that demonstrate how ideas and methods from psychology and anthropology offer complementary means of probing how consumers think and feel. We seek to show that blending methods and theories from these two disciplines leads to productive results for marketers and for the researcher-client relationship. We have focused on marketing research, which is our domain, but we have no doubt that, together, psychology and anthropology can benefit other areas of industry.

### **Understanding the "Dinner Dilemma"**

An international client who specializes in a packaged food sought to better understand how middle class American women typically create a family meal for each day of the week. The advertising agency assigned to this project decided to use in-home ethnography conducted by anthropologists (including one of the authors) and observed shopping patterns of consumers to understand the ways in which women thought about, prepared, and created meals for their family. The research methods for the project included a blend of psychological and anthropological methods such as observations and interviews around meal planning, preparation, and meal-time consumption. In addition, before the scheduled ethnographic visit, the anthropologists who conducted the research asked each woman to keep an in-depth journal of her daily thoughts and feelings around meal planning over the course of a week. These combined approaches led to new thinking about the role of women in meal preparation.

The anthropologists discovered that both experienced and novice home cooks receive and share recipes and meal ideas through a social network of other women, including women in their

family, female friends, neighbors, female associates at work, and in the local community. The anthropologists reported that when women searched for meal ideas they typically were informed about a recipe or meal idea from a fellow female worker, female friend or relative, and then carried out the recipe or checked for close alternatives on websites, cookbooks, or magazines. This learning reflected the powerful influence of personal connections in the daily task of generating meal ideas for the family. The idea of a “successful family meal” intertwined both food features (i.e., combination of vegetables, meat, and starch), and the relational outcome of such meals (family enjoyment and socializing). Success was determined by what family members liked to eat, and the resulting shared feelings of happiness and togetherness such meals produced. For example, a sister might strongly recommend a meal idea or recipe that she had used successfully to make a “happy meal occasion,” and pass this “family recipe” to her sibling or other women. Indeed, the anthropologists discovered that the world of food and recipes is highly contextual of lived situations, where food is intertwined with personal stories and social connections. As Harris points out, “Food, so to speak, must nourish the collective mind before it can enter an empty stomach” (1985, p.15). Food is ultimately social and personalized, since face-to-face connections significantly influence meal ideas, choices and outcomes.

The success of this project lay in coalescing an understanding of the range of psychological states that women bring to meal preparation, along with an anthropological perspective on the importance of social exchange in meal ideas and recipes. Especially insightful was the analysis of women’s daily journal logs, since women wrote about their varying emotional states, such as when they felt creative, inspired, bored, and even frustrated, at coming up with meal ideas on a regular basis. In addition, the anthropologists discovered that women resolve such frustrations through sharing information with other women who might be experiencing similar emotional states. As Maslow writes, healthy individuals are motivated by higher order needs in which sharing their “potentials, capacities and talents” helps fulfill a sense of mission (Maslow, 1968, p.25). In this way, a friend or sister with whom recipes are exchanged occupies the same psychological space as another familiar or close woman, and the sharing of meal ideas helps to identify and align women with similar thoughts and feelings about cooking for their families. By blending a psychological perspective on cooking as it relates to the emotional state of the self, with an anthropological perspective on social networking and recipes producing relations of reciprocity, the anthropologists discovered that strong emotions were attached to the idea of recipes as “recreating the family” as a social unit through the family meal.

These insights from the anthropologists helped the advertising agency create a range of strategic and tactical marketing solutions to assist women in planning their weekly meals, beyond just using recipes from the client’s website and magazine. For example, the ad agency recommended that the client’s website could retain a psychologist to offer tips and advice on a website for new and experienced cooks on how to deal with feelings of stress in preparing the family meal, i.e., offering website content that addressed the whole person, responding to her at a moment of need in her particular life stage, and providing her the space to connect with the client’s brand. The advertising agency also suggested ways for women to expand their meal options and offer recipe ideas for friends and advice on how to set up meals for different occasions and events, as well as starting local cooking classes for beginner cooks. Finally, the agency employed a multi-disciplinary approach to cover the range of women’s emotional and activity states in thinking, planning, and creating meals for their family. The agency applied creative ideas that reflected modes of self-identity that Belk spells out as “doing” states and

“being” states (Belk, 1988). The client praised the agency’s findings and recommendations, and has since implemented many of the suggested marketing plans.

### **Breakfast Cereal and High Stakes Experience**

The U.S. cereal market is cluttered with brands that compete for a place on the consumer’s palate. In this case study, the client needed to learn how their brand could increase consumer selection in-store during consumers’ “moment of choice.” Instead of conducting in-store observations, the usual research choice for this kind of inquiry, the client asked the research company to explore consumer responses in a focus group setting. It was agreed between the client and the research supplier that a combination of psychological and anthropological methods would generate insights on the breakfast experience (when most cereal is consumed), the client’s brand and competitive brands, and drivers of brand choice. Ninety minute in-depth one-on-one interviews were arranged with 13 consumers. Prior to the sessions, consumers created collages with images that illustrated how they feel when eating the client’s brand and how they feel when eating other kinds of breakfast foods (non-cereal). The use of images as metaphors to elicit respondent commentary is a technique used by many marketing research companies, championed by Zaltman (2003), and was a tool for early psychologically-driven anthropological studies in the form of the Thematic Apperception Test (TAT) (Bock, 1980, p.96-105). Respondents also kept two-week diaries concerning their breakfast experience and took photographs of home eating and breakfast food storage places, techniques that some marketers consider ethnographic (Malefyt, 2009). During the interview sessions, the respondents were exposed to a model of a supermarket shelf-set with a wide range of brands, tasted the client’s brand and competitive brands, and were asked about their feelings, beliefs, and rituals surrounding breakfast. A variation on life history elicitation was incorporated, mirroring efforts in anthropology dating back to Dyk’s early Navaho work (1967, [1938]) and following a central practice in psychotherapy (Gabbard, 2005; McWilliams, 1999, p.42). Respondents were asked to describe childhood breakfast eating experiences and to imagine their current life without their preferred brand, a deprivation exercise with questions centering on their degree of loss and food substitutions.

This project called for an anthropological perspective on the meaning of food during a specific eating occasion, for a psychological perspective on an eating experience, informed by observed consumption, and additional insights into consumer’s attitudes and feelings about their brand. Analysis revealed that breakfast is a liminal space, an in-between ritual time during which transformations occur (Turner, 1964, 1969). Early morning is a transitional period, when consumers move over a threshold from sleep to waking, from their private to public self. The breakfast cereal brand they consume during the liminal phase is central to the content of their transformational experience. The client’s brand’s sensate attributes of sweetness and crunch made respondents feel happy, optimistic, and even joyful. This finding, first discovered during the interviews, was underscored during observation of consumption of the client’s brand. The positive feelings were expressed when respondents experienced a cascade of enjoyable flavors and textures. Drawing on a psychological definition of mindfulness, it was concluded that eating this brand was mindful because it stimulated a charged awareness of a sensate experience (cf. Bishop et al., 2004, for psychological definitions of mindfulness). The researchers and their clients agreed could this quality of experience could help the client’s brand gain “ownership” of breakfast. Other findings informed an understanding of breakfast and the brand. From a cognitive classification perspective, there was a sharp distinction between weekdays, which entail purpose and preparation, and weekends, which are more relaxed and loosely structured.

Through the discussion of the collages and detailed description of the consumption of the client's brand and other breakfast options, breakfast was revealed to be psychologically linked to ownership, and be territorial, with consumer phrases such as: "My breakfast"; "My time"; "My zone." These findings helped the research and client team realize that breakfast is high stakes; the wrong breakfast, e.g., donuts, can negatively affect eating choices for the remainder of the day, compromising mood, productivity, and self-image.

This research provided the client with a deep understanding of their brand and the means to position it in the marketplace more competitively. The study contributed an anthropologically informed analysis of the transformational nature of breakfast and the psychological attendants of that time. As expressed in the Creative Brief that would serve as a guide for advertising development, the client's brand releases the consumer's best, most optimistic self at the start of their day (paraphrased here for confidentiality). After the study was completed, the client lauded the research team's layering of anthropological and psychological methodologies and analysis, and rewarded the research company with numerous additional projects. When new projects were assigned to the research company, the client Insight Director asked the research company to blend psychological and anthropological approaches. She commented repeatedly that the appeal of the research company lies largely in its ability to engage in this kind of hybrid research.

## **CONCLUSION: FROM MUTUAL EXCLUSIVITY TO MUTUAL BENEFIT**

Epistemologically, the academic disciplines of psychology and anthropology have clear distinctions, but in consumer marketing and research practices, the units of analysis are often conflated. We see this conjoining of methodologies and theoretical approaches as eminently useful for understanding consumer behavior and commodity selection, and for helping to bridge conceptual divides between business executives and the anthropological researchers they hire. We have argued for what Wilson (1998) calls consilience. In this context, it is a convergence of psychology and anthropology toward both heuristic and occupational ends (cf. Belk, 1988, for a multidisciplinary analysis of possessions). As we have contended, the successful application of convergence will require changes in the way business anthropologists think about their work and interact with their research subjects and their clients. We believe that this interdisciplinary synthesis will positively shape the future of anthropologists in corporate work. It merits serious consideration by PhD students who are interested in pursuing a career in applied anthropology.

As Sunderland and Denny (2003) note, the cultural perspective of anthropology has value in and of itself, and the distinction between anthropological and psychological questions should be recognized. We agree, conceptually. However, rather than launch a battle with marketing and advertising executives in an effort to educate them about differences between anthropology and psychology, we believe it is wiser to consider how psychological and anthropological ideas interact in the interest of consumer understanding. We connect individuals to cultural processes and consider how ideas, beliefs, and actions surrounding wellness, shopping behavior, cooking, and food consumption behavior and other domains provide solutions to marketing challenges. This is what our clients ultimately want. They disdain theoretical distinctions but they embrace practical knowledge that can lead to brand growth. In this way, we educate our clients gradually on anthropological concepts, such as rituals, social exchange, and other cultural processes, without engaging in contentious debates about "an anthropological approach."

Being anthropologists in advertising and marketing research affords us a position in which we are able to play with accepted practices of psychology, expanding them to be more

anthropological and to integrate psychological methods and modes of thinking with anthropological ones. We are not alone (cf. Rapaille, 2006, for a popularized approach). In this sense, the business world may provide more freedom than academic settings in which to integrate the two disciplines because business applications are less concerned with purity of theory, method, application, and more about answering questions with marketplace value. Many anthropologists succeed in business while retaining theoretical purity. Other practitioners face clients who find an exclusively anthropological perspective limiting or too arcane to be of value. For the latter segment, convergence between anthropology and psychology will open opportunities in applied anthropology as it makes the work and the working relationships of anthropologists in business more robust.

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