

Netnography research - community insights in the cosmetic industry

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The article describes 'Netnography', an innovative research approach to extract and use online community dialogue for research and innovation purposes. It has four main aspects or research: qualitative, customer integration (extracting insights from social networking conversations), relevant online communities, web information retrieval. A case study is described from cosmetics (sunless tanning). There were five methodological steps: 1) definition of research field; 2) identification and selection of online communities; 3) community observation and data collection; 4) data analysis and aggregation of insights; 5) translation into product and service solutions. The role of researchers in the process is discussed.

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INTRODUCTION

"Markets are Conversations" is a widely discussed statement based on the fact that historically the marketplace was not only a location where people met to trade goods, but also a place where they talked about their needs and problems. In doing so, people connected to each other. These classical marketplaces rarely exist today, as most people shop in specialized stores where they interact only with sellers. The Internet is an advancement in mass media that recreated such "old" marketplaces on a large scale. It hosts and provides access to virtual marketplaces, where consumers can once again easily connect to each other. There is little doubt that the internet has also changed the way consumers communicate. An increasing number of consumers actively gather together online and communicate in web forums, blogs and various kinds of user generated content platforms. They exchange personal experiences and opinions about products and their usage and talk about opportunities for solving product-related problems (need-information). Some even develop product modifications and innovations, which they post online and share with other community members (solution-information). This makes

online communities' interaction platforms where highly involved consumers exchange existing needs, wishes, experiences, motivations, attitudes and perceptions towards products and brands. In literature most authors refer to Consumer Insights as a rather fuzzy concept. The notion includes statements based on a deep understanding of the target consumers' attitudes and beliefs and apprehending the inner nature of things. It is about an extended understanding of products within their context and scenario of usage. Based on various research studies conducted in different industries and branches (e.g. sports, personal care/cosmetics, media, food, electronic goods, telecommunication, etc.), the authors differentiate four levels of Consumer Insights accessible in Online Communities which are illustrated in Figure 1.

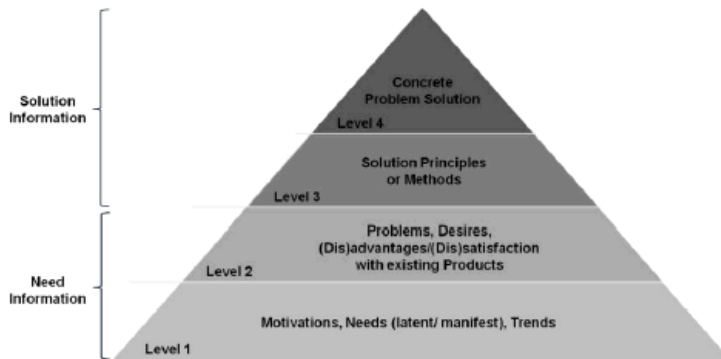


Figure 1: Levels of consumer insights

Whereas consumer need information (Level 1, Level 2) can implicitly and explicitly be derived from the consumer dialogue, solution information is presented by innovative users either as product prototypes or as solution principles of related products from analogue markets. As a short excursion we briefly want to demonstrate how the *Reef Central Community* dealing with aquariums and aquaculture was used to gain Consumer Insights for a chemical corporation. More than 200,000 members exchange their experiences and know-how on aquarium chemistry, pump systems, filtration equipment, water contamination, fish diseases, vermin control or water quality measurement systems and procedures. Regularly more than 2,000 members are online at the same time and present their most recent solutions to the peer group. The left part of Figure 2 shows a rebuilt TV set equipped with a heating circuit and lighting system in order to kill coliform bacteria. All system components can be activated by the former TV button controls. The right part of Figure 2 shows a natural filter system developed by a community member. It is based on materials like acrylic glass, coral sand, activated carbon coal, glass sand and two 35-watt pumps. These two illustrated examples are a selection of hundreds of user innovations within the micro world of aquariums which possibly can be applied as solution principles in the field of water treatment which currently is addressed as a major challenge by industrial and chemical corporations. These gained Community Insights from the analogue aquaculture discussion offered completely new point of views which are subsequently tested regarding feasibility and transferability in the macro world of water treatment. This short excursion exemplifies that online consumer conversations can be a valuable source of unobtrusive data for various market research questions, not only in the consumer goods sector but also in the industrial goods sector. However, without a systematic procedure to identify, select and analyze large volumes of consumer conversations on the Internet, researchers are confronted with information overload. In this article we introduce *Netnography* as an innovative research approach to extract and use online community dialogue for market research, marketing and product development. By applying the methodological steps of *Netnography*, it is possible to select, extract, analyze and aggregate consumer statements in a systematic way in order to explore deep Consumer Insights and transfer them into customer-oriented product and marketing solutions. In the first part of the paper we present a theoretical framework of *Netnography*, in the second part we describe the methodological steps of *Netnography* with the help of a case study in the cosmetics industry.



Source: <http://www.reefcentral.com/forums/>

Figure 2: Innovative problem solutions by community members

THEORETICAL BACKGROUND

Netnography is a qualitative, interpretive research methodology that uses Internet-optimized ethnographic research techniques to study the social context in online communities. Marketing professor Robert Kozinets created it in 1998 (Kozinets 1998, 2002). The word “*Netnography*” is a linguistic blend of two words: “Internet” and “Ethnography”. It is also known as multimedia cyber-anthropology or virtual ethnography. *Netnography* is a research methodology that spans over several science fields. Main theoretical aspects of *Netnography* as illustrated in Figure 3 include: 1) Qualitative Research, 2) Customer Integration Research, 3) Online Community Research, and 4) Web Information Retrieval.

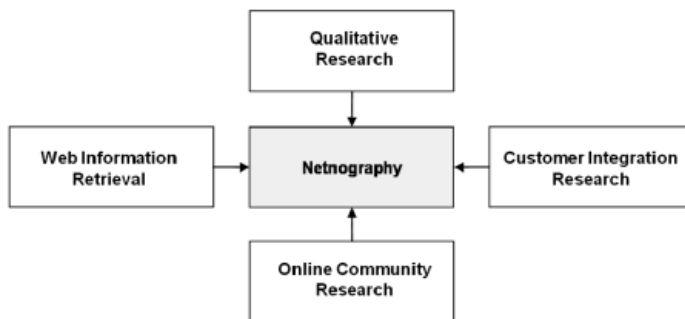


Figure 3: Theoretical touch points of netnography

Qualitative Research

Qualitative Research aims to gather an in-depth understanding of human behaviour and the reasons that govern human behaviour. Basically, qualitative social studies comprise various methods, some of them focusing especially on investigating the consumer behaviour in an exploratory way (e.g. focus groups, group discussions and qualitative or semi-structured interviews) in contradiction to the mostly prevailing quantitative hypothesis-testing research in management literature. From the beginning of qualitative research in the 1950s and 1960s, Ethnography was and still is an elementary research discipline used for social studies in the field of anthropology and sociology. The initial step of ethnography consists of fieldwork within a social group in order to collect data. The researcher makes cultural entrées and conducts interviews and observation, with participation and relationship development with the subjects. Finally, hypotheses are generated based on the collected data. This classifies ethnography as a grounded theory. An ethnographer needs to get involved as a participant-observer, which makes data collection and interpretation heavily dependent on the skills and interests of the researcher. The term *Netnography* implies the application of ethnography in an online context. However, there are some significant differences regarding the proceedings of research. Unlike ethnography, *Netnography* focuses only on social groups represented on the Internet such as forums, blogs, chat rooms, consumer portals, newsgroups, and user generated content platforms. Furthermore, the possibility to download communication data from an online community makes most standard ethnographic manual data collection methods dispensable.

Finally, in contrast to ethnography, *Netnography* is in most cases unobtrusive and data is collected by observation only. Hence, *Netnography* is an empathic way of understanding wishes, perceptions, attitudes, opinions, and rituals within the social context of online communities.

Customer Integration Research

In the era of “open innovation” researchers as well as consultants proclaim a co-creative value creation process in active cooperation with customers and users. Producers profit from consumer knowledge by integrating the “area of usage” early in the product development process, whereas consumers benefit from products that meet their requirements better. Next to already established approaches like the Lead User Method recent developments of information and communication technologies has led to a new trend in customer integration research by adding a “virtual” component to it. As part of this research Dahan/Hauser introduced the virtual customer initiative including different web-based tools in order to reinforce the collaboration of producers and customers throughout the development process (Dahan/Hauser 2002). Broadly speaking virtual customer integration research focuses on the changing role of consumers within the innovation process by establishing an ongoing web-based interaction within all stages of the innovation process. In respect to this, *Netnography* is classified as a virtual customer integration research method because it extracts Consumer Insights from dialogs that take place in virtual communities. These Consumer Insights can be integrated particularly into the early steps of the value creation process. The explorative research possibilities of the method allow companies to get answers on questions they may not have even considered in other study designs of traditional market research methodologies, especially in the fuzzy front end of innovation.

Online Community Research

Online Community Research constitutes a fundamental theoretical aspect of *Netnography*. Online communities are also known as virtual communities, Internet communities, cyber communities, computer-mediated communities and E-tribes. As a multidisciplinary field, online communities facilitate technical, social, and marketing driven aspects for research. Consequently, definitions of online communities vary depending on the disciplinary perspective. Technical oriented definitions focus on the underlying technology whereas in social sciences, definitions concentrate on relationship building, fellowship, social norms, and emotion. *Netnography* is predominantly used as an online market research method and therefore focuses mostly on virtual communities of consumption consisting of affiliate groups whose online interactions are based upon shared enthusiasm, and knowledge sharing regarding a specific consumption activity. To understand the significance of online community research for marketing, it is important to understand its value proposition for producers. As large pools of information and product know-how, virtual communities of consumption present an important innovation resource. Online communities provide direct and low-cost access to consumers allowing producers to establish instantaneous dialogue and breed loyalty. By analysing online communities companies can recognize trends, identify lead users, and react to new market conditions faster.

Online community research can be conducted as a singular one-time research project, as well as an ongoing research program. Furthermore, community members can be integrated either actively (addressed with specific tasks by the company) or passively (unobtrusively monitoring the community and integrating the gathered information, knowledge and ideas into the new product development process). Consequently, depending on its continuity and level of integration, four different types of Community integration can be distinguished in order to engage online communities in a company's innovation process (see Figure 4).

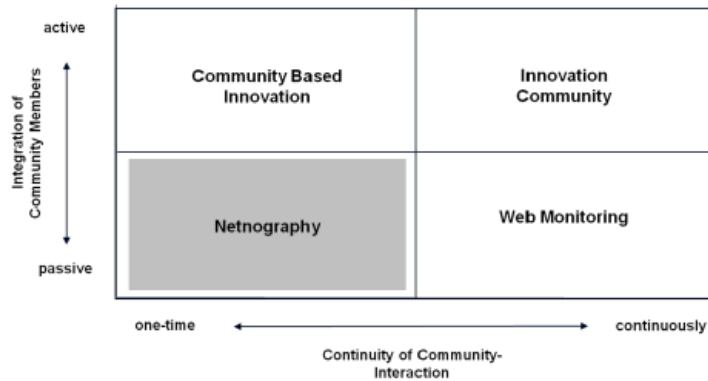


Figure 4: Classification of online community research methods

By passively observing the community dialogue *Netnography* aims to retrieve product-related information about consumer experiences, behaviour, wants and needs. In contrast to *Netnography*, web monitoring is a highly automatized and continuous process. Based on predefined topics, monitoring software constantly tracks and analyzes online content in search for patterns, trends, valence, etc. Natural language processing and automatic web information retrieval are key technologies of web monitoring. In contrast to the observational research settings of *Netnography* and Web Monitoring the active integration methods Community Based Innovation and Innovation Community focus on the actual design of the virtual interaction with users. Defined innovation tasks are assigned to, coordinated and accomplished by members of the community using web-based instruments like User Design, Toolkits, Idea Platforms etc. Thus the community members become co-creators and development partners (Füller/Bartl et al, 2006).

WEB INFORMATION RETRIEVAL

In the last decade because of the growing importance of the Internet as an information medium, web information retrieval developed into a separate research area. It focuses on identifying, extracting and preparing information from the Internet with the help of software based tools and algorithms. There are several major challenges in web information retrieval. Firstly, the amount of data on the Internet is gigantic. Secondly, there is no standard for data structures on the web. Web pages are present in different languages and forms, including text, tables, lists, and dynamical and multimedia elements. Web information retrieval must be intelligent and flexible enough to work with different, unpredictable and ever changing data types and structures. Thirdly, the Internet is continuously changing. The technology base is constantly developing and providing new platforms for publishing information. Hence, web information retrieval has to be constantly adapted to the requirements of the dynamic Internet environment. Finally, analysing conversations in the internet is an even bigger challenge for text mining software than analysing “normal” written text because of the intensive usage of colloquial language, specialized vocabulary, spelling mistakes, abbreviations and in particular because of the common use of irony and sarcasm. All this makes web information retrieval more challenging in comparison to information retrieval from standard offline document databases.

The four theoretical touch points described above give an overview how *Netnography* crosscuts different research areas. While academics can build up on the introduced scientific alignment in order to further investigate Netnography as a new research method, we describe the methodological steps of *Netnography* as a guideline for research practitioners in the following chapter of the paper.

METHODOLOGICAL STEPS APPLIED IN THE COSMETICS INDUSTRY

To give a deeper understanding and a more detailed overview concerning the procedures and activities

included in *Netnography* research, the method is presented along a case study conducted in the cosmetic industry on the topic of sunless tanning. The five single steps of the method are illustrated in Figure 5.



Figure 5: Methodological steps of netnography

Step 1: Definition of Research Field

In preparation of a *Netnography* project high importance lies in the elaborated specification of the research area. This includes the definition of the field of innovation as well as the systematization of topics, trends, markets and products which are of major interest. The operating result of the first step is an extensive mind map that contains a classification and structured set of topics which are used as starting point to define search strategies for the identification of adequate online sources. The main project goals in the case of the *Netnography* research on the topic of “sunless tanning” focused on the usage of tanning products as well as on the general perception of tanning and beauty also in comparison to other tanning methods and solutions, like e.g. natural sun tanning and tanning studios. A whole set of relevant research questions were defined as follows:

- What are the triggers for consumers to enter the category of sunless tanning and what keeps them using the product?
- What are the daily rituals and habits of usage as well as cross-usage of self tanning products, face & body care products, moisturizing products, make-up products?
- On which occasions sunless tanning products are used and on which parts of the body?
- Which problems consumers face with sunless tanning products and which major areas of improvement from a consumer point of view do exist?

Step 2: Identification and Selection of Online Communities

The aim of the second step of *Netnography* is to identify communities and internet sources where users exchange relevant information on the defined research area. Considered are online data sources like forum discussions, blogs, newsgroups, Web 2.0 platforms, consumer portals, chat rooms and user generated content platforms. Multiplayer online games or online social worlds can also be of interest for specific research questions. To identify community dialogue which especially focuses on the research topic of interest various search strategies are set up by the researcher. For this purpose general online search engines, meta search engines and specific online search engines that focus on blogs, groups, communities and other social media sources, are lined with keyword lists. In the sunless tanning project 437 communities in five different languages were identified as relevant internet sources which contain consumer discussions on the topic from different

angles of user groups, e.g. discussions on sunless tanning were identified within the fields of beauty&care (e.g. www.beautyjunkies.de), fashion&lifestyle (e.g. www.styleforum.net), health (e.g. www.healthboards.com), shopping (e.g. www.ciao.com), questions&answers (e.g. answers.yahoo.com) as well as in communities focusing on women, men or teens as user groups. Moreover user generated content platforms such as YouTube (www.youtube.com) offer a wide range of user videos dealing with the topic. Again it was interesting to see that analogues markets also exist for sunless tanning cosmetic products. It turned out that self tanning is discussed intensively in body building communities (e.g. www.bodybuilding-magazin.de). Preparing for body building contests the community members exchange very detailed experiences and procedures to apply tanning products. And as the overall appearance is a main success factor in such a contest, body builders are a user group which has highest requirements regarding a “perfect tan”. Additionally, to the widespread discussions found in various online contexts it was overwhelming how many online communities focus solely on the topic of tanning. Examples are www.abtan.com, www.tantalk.com, www.tanfx.com, www.tantoday.com, www.tanningbeauty.com, www.sunless.com, www.thetanforum.com, www.iamtan.com and many more.

Having identified and sighted often a couple of hundred relevant online sources for *Netnography* the researcher has now to select the communities she/he wants to immerse in for further in-depth analysis. This is still an individually driven process strongly depending on the abilities of the researcher. Nevertheless, there exist a number of appropriate and well proven qualitative and quantitative criteria which support the researcher in the selection procedure. Qualitative criteria include e.g. “topic focus”, “data quality”, “language type”, “interaction type”, “profile editing”. Quantitative criteria include criteria such as “number of messages”, “frequency of usage”, “member activity”, “data quantity” or “interaction level”. Not all of these criteria are always available for comparison as some online sources not necessarily indicate the information and facts needed to set up or calculate them. Once more the researcher has to engage in order to focus on the adequate data sources. The result of the selection process is generally a set of 3 to 15 online sources which provide the main bulk of data for the following in-depth analysis. Complementary, additional sources can be added if required or if adequate for questions of detail. In the case of sunless tanning we focused after a thorough selection on six communities: www.iamtan.com, www.sunless.com, board.beauty24.de, www.gofeminin.de, www.healthboards.com and www.bodybuilding-magazine.de. Figure 6 shows an overview of avatars used by members to represent themselves within their community.



Figure 6: Consumer tribes

It is obvious that within the lamTan-community a different type of user is prevailing in comparison to the

BodyXtrem Community. This also means that the members talk about sunless tanning in a different context of usage. Hence for further analysis it has to be taken into account that different communities stand for different consumer tribes which are groups of people who intensively share a common passion. This common passion bonds the consumer tribe together through a shared sense of belonging. From this it also follows that online communities are often not representative for an already defined target group of the producing company. However as *Netnography* is classified as an exploratory research approach the focus lies on revealing undiscovered consumer needs, product ideas and potential fields for growth and innovation rather than on the assessment of representativeness. This is up to complementary quantitative research activities which build up on the identified Consumer Insights.

Step 3: Community Observation and Data Collection

In stage 3 of the *Netnography* approach the selected online communities are observed by the researcher, who immerses in the community and its social context. This is accomplished by extensive reading with focus on conversations which are recent, extensively corresponded to, referenced and frequently viewed from the community members. While before the emergence of the internet it was necessary for the researcher to participate in the considered social group, nowadays *Netnography* enables observation and analysis of the consumer communication without active participation. Hence the approach is a way to unobtrusively study the nature and behaviour of online consumer groups. The analysis is conducted in the natural context of the community and thus is free from the bias which may arise through the involvement of the researcher or experimental research setting. During the immersion process the researcher becomes sensitive towards the attitudes and the communication mode of the community members. The data retrieval itself is carried out manually. Although qualitative data analysis (QDA) software such as NVivo or Atlas helps file data, organise data and facilitate interpretation, to the authors' knowledge no software tools or semantic algorithms exist yet which can reliably identify and qualitatively interpret statements relevant for the research questions stated. One of the reasons is that online communities typically develop an own language. For instance, members of sunless tanning communities consistently use the term "raccoon eyes" for their perceived troubles of tanning the area around the eyes e.g. when using a tanning bed.

"I think that I have the worst racoon eyes in the world. Everyone at the gym I work at has let me know that my eyes are REALLY WHITE. I looked at a pic of me from a few days ago and it looked like my eyes where glowing in the dark! You gotta wear the goggles when you use a tanning bed so I think the best solution unfortunately would be to use sunless tanner." (Source: iamtan.com; skinni_mini)

Consequently, although software enhanced search functions may help identify posts containing certain key words, they cannot accurately distinguish between valuable and irrelevant postings within the context of the conversation. At this stage the researcher's knowledge on content analysis, qualitative data analysis and discourse analysis is incorporated as an iterative process of 1) noticing consumer statements, 2) collecting statements and 3) thinking about interesting consumer statements. The researcher notices statements by reading them – or in fact by reading them many times – and by naming or "coding" them with the help of a descriptive naming scheme. To build up a coding system the researcher combines an inductive (evolutionary) as well as a deductive (predefined) categorization procedure. The structuring of the categories is based on linear, hierarchical or networked coding lists. During the coding process the constructed category system can be adjusted by merging or diversifying coding families. As the researcher notices and names the consumer records the next step is to collect them. Some of the statements will easily fit into the build categories whereas others will be more difficult to categorize. In any way, this sorting represents the collecting of online consumer statements. As a result of "noticing" and "collecting" consumer statements in step three of the *Netnography* approach the

appropriate ratio, for the percentage needed, and add that to your lotion, which is what the LL Method does. (see recipes on the FAQ board on the main lavender board)” (Source: sunless.com; VickyII/III)

The aggregated Consumer Insights as a result of the application of *Netnography* in the cosmetics industry was of major interest for the client. The expectations on this new research methodology, i.e. to utilize a huge number of consumer statements for qualitative analysis, to get unobtrusive and unbiased original consumer statements and to get access to specialized user groups were fulfilled.

Step 5: Translation of Community Insights into Product and Service Solutions

The *Netnography* process typically does not end with the generation of insights. A major challenge is to transfer the obtained insights into innovative product and service solutions. The deep consumer understandings enable to derive not only incremental improvements but also new-to-the-world offerings regarding products and brands along different result dimensions shown in Table 1.

Product related results	Source for product innovations and product modifications Identification of user innovations and product prototypes Visualized product- and service solutions Qualitative evaluation of market potential, trends, opportunities and risks Definition of core values and unique selling propositions Insight based positioning strategies
Brand related results	Explorative derived brand & product positioning dimensions Brand comparisons and Best Practices
Target group related results	Qualitative triangulation of existing target group definitions New market and consumer segmentations Insights in use cases and area of usage Identification of Lead Users, Opinion Leaders and Early Adopters
Communication related results	Qualitative consumer feedback on communication activities and campaigns Development of consumer oriented communication strategies Directions for social media and viral activities

Table 1: Result dimensions of netnography

The translation into solutions itself does not follow a defined process. It is an inherently complex and non-linear task which requires different people from different disciplines. Accordingly, the netnography researchers closely collaborate within this step particularly with product designers who contribute the assets of creative and inspirational input to drive forward innovative problem solutions. Therefore, the final step of Netnography combines the analytical thinking of researchers with the creative thinking of designers including their tools and approaches for ideation and product prototyping. Based on the nine consumer insights aggregated in the previous step the team of researchers and designers jointly developed four problem solutions in the field of sunless tanning. Three of them where product related solutions realized as virtual prototypes of new sunless tanning products. One solution relates to consumer communication and new sales options. Although the solutions can not be presented here because of secrecy reasons the project experiences shows that the uniqueness of the derived product solutions lies in the consistent and radical alignment along consumer needs revealed in the analysis of the community dialogue. As a consequence the suggested solutions were integrated into the established stage gate innovation process of the client and further project activities regarding verification of patent, trademark and protection rights, technological realization alternatives and conduction of representative market studies are ongoing

OUTLOOK

Netnography is a new qualitative category of online research. Along the case study of sunless tanning conducted in the cosmetic industry the *Netnography* as a systematic five step approach was shown to be helpful to access online community members' knowledge and creative ideas. One of the main benefits of the

methodology is the possibility to access unfiltered, unbiased information from very experienced and highly involved users. Due to the huge amount of conversations and the vivid online dialogue regarding consumer products marketing and innovation managers are able to obtain deep insights into the everyday problems experienced by consumers and their solutions to those problems. However the findings of a *Netnography* research project strongly depend on what the researcher considers as important when identifying and saving postings from the community, how certain statements are interpreted and what conclusions are drawn from reading 'between the lines'. Consequently, one of the limitations of *Netnography* is that the findings may be influenced by a cognitive bias of the researcher. To avoid the subjective bias of the researcher, typically several efforts are made. First, data saving and analysis is conducted by two researchers independently who then compare their findings and interpretations. Second, as the data is stored and analyzed qualitatively using a software, it is easily possible at any time to access the discussions and statements on which the conclusions are based. Third, once the findings are gathered, they are 'triangulated' meaning that their trustworthiness is tested by comparing them to secondary data (e.g., company data, result of other research projects etc.), conducting interviews with experts in the product field (e.g., product managers) and/or approaching selected user and/or community members and confronting them with the results. In order to ensure that the identified ideas and the stated opinions are not only valid within the community, but also reflected in the larger target group, quantitative market research should be applied complementary as the consumer tribes described in step 3 of the *Netnography* process are not necessarily representative for the well defined target groups of the producers. Summing up the outstanding benefit of *Netnography* is to get insights into the needs and thoughts of highly involved and experienced users. It provides an in-depth understanding of the topics that are relevant for users within a certain product field, including their perception of existing products and brands, unsatisfied needs and innovative problem solutions.

Next to a reliability check of the results, another key requirement when conducting *Netnography* research is to carefully follow ethical guidelines. Besides asking the administrators or owners of the selected specialized online forums for their permission to analyse discussions, *Netnography* researchers also need to make themselves familiar with the communities' netiquette and rules of conduct prior to analysis. Our projects have shown that *Netnography* is quite time consuming and requires specialized research skills. Even the identification of innovative communities is not trivial and requires considerable searching effort. Further, *Netnography* requires the researcher to become familiar with the peculiarities of the community such as its language, behaviour and netiquette before the observation and data gathering can start. Obviously, monitoring the communication of thousands of community members for innovative ideas requires considerable effort and may become quite tedious. In order to benefit from *Netnography* to its full extent, companies must be aware that they have to provide enough resources to conduct the study and to deal with the community insights in detail.

Due to the huge amounts of relevant consumer online statements that exist for nearly every consumer product field, the idea to analyse this content in a quantitative and automated way arose. Meanwhile, many market research institutes and IT companies crawl the internet for relevant content and analyze it via frequency counting and natural language processing algorithms. But what is the benefit of such auto-*Netnography* solutions for understanding consumers and generating consumer insights? The problem lies in the generated results of these automated tools. They produce again numbers and graphs. The underlying original statements in the "voice of the customer" either disappear or are not aggregated in a proper way to support decision making especially in the field of innovation which generally is linked with high follow up investments. Software tools which possess the same intelligence than well-trained researchers in that they learn the language of the selected communities and also read between the lines and then automatically identify, select and analyze relevant statements do not exist yet. Hence the *Netnography* approach will always rely to the bigger part on the

capabilities of the researcher although there is undisputably a huge potential that IT support will make single steps of *Netnography* more efficient. Therefore it is not the aim in the future to fully automatize the process but rather to maintain and emphasize the qualitative nature of the method.

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