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# Marketing Strategies to Increase Profits from Retailing Fair Trade Coffee

Emily Christine Knowles

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# Walden University

College of Management and Technology

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Emily Knowles

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Walden University  
2015

Abstract

Marketing Strategies to Increase Profits from Retailing Fair Trade Coffee

by

Emily C. Knowles

MA, Liberty University, 2011

BS, Liberty University, 2008

Doctoral Study Submitted in Partial Fulfillment  
of the Requirements for the Degree of  
Doctor of Business Administration

Walden University

December 2015

## Abstract

Low consumer loyalty threatens the sustainability of the fair trade (FT) coffee market and corporate social responsibility investment. To provide business owners with strategies and decision-making processes to market FT coffee products successfully in the United States, this phenomenological study explored the lived experiences, perceptions, and insights of 20 FT coffee marketing managers. Planned behavior theory served as the conceptual framework. Face-to-face or Skype interviews were conducted with each of the 20 purposefully sampled FT coffee marketing managers. The data from these interviews were analyzed using Moustakas' modified van Kaam method and qualitative analytic software to collect, group, reduce, validate, and organize the interview data into themes. Nine themes emerged from the analyses. The theme analysis revealed the importance of including consumer education as a part of a marketing strategy to improve consumer understanding of the FT label and to catalyze demand. Based upon the topics participants emphasized during the interviews, another principal theme was the importance of establishing a direct relationship with a farm. Furthermore, 2 of the 20 participants provided unique insights on achieving consumer trust and the importance consumers attribute to consistent taste. Educating consumers on the effects and implications of the FT label is instrumental in increasing profits from FT coffee. The findings could catalyze beneficial social change by enabling business owners to educate consumers through marketing communications, which increase their market share of FT coffee and thereby enhance the lives of third-world farmers.

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## Dedication

I dedicate this research to my Lord and Savior, Jesus Christ. All glory belongs to God, who is able, through his mighty power at work within us, to accomplish infinitely more than we might ask or think (Ephesians 3:20 NLT). There were many times when I was unsure of my ability to complete this project, and it is only by His grace and through His strength that I have accomplished this task and completed this degree. I thank my family, especially my husband, who made sacrifices to support my education and research goals. Your prayers and encouragement gave me the inspiration I often needed to finish well. I also thank my friends and coworkers who humored my need to frequently discuss my capstone journey.

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## Table of Contents

Section 1: Foundation of the Study.....	1
Background of the Problem .....	1
Problem Statement .....	2
Purpose Statement.....	2
Nature of the Study .....	3
Research Question .....	5
Interview Question.....	5
Conceptual Framework.....	6
Definition of Terms.....	7
Assumptions, Limitations, and Delimitations.....	9
Assumptions.....	9
Limitations .....	10
Delimitations.....	10
Significance of the Study .....	10
Contribution to Business Practice.....	10
Implications for Social Change.....	11
A Review of the Professional and Academic Literature.....	12
Social Responsibility to Corporate Social Responsibility .....	13
Corporate Social Responsibility as a Marketing Strategy .....	15
Social Responsibility and Brands .....	20
Fair Trade.....	24

Direct Trade .....	27
Sustainable Coffee .....	28
Willingness to Pay for FT and Organic Products .....	31
Trust and Brand Loyalty Toward Fair Trade .....	38
Planned Behavior Theory as a Conceptual Framework in Consumer Research .....	40
Phenomenology.....	43
Phenomenology in Consumer Research .....	47
Summary and Transition.....	50
Section 2: The Project.....	52
Purpose Statement.....	52
Role of the Researcher .....	53
Participants.....	53
Research Method and Design .....	55
Method .....	55
Research Design.....	56
Population and Sampling .....	59
Ethical Research.....	60
Data Collection .....	61
Instruments.....	61
Data Collection Technique .....	64
Data Organization Techniques.....	64

Data Analysis Technique .....	65
Interview Question.....	65
Data Analysis Software.....	66
Data Coding and Data Analysis Consistency .....	66
Conceptual Framework.....	67
Reliability and Validity.....	68
Reliability.....	69
Validity .....	70
Summary and Transition.....	72
Section 3: Application to Professional Practice and Implications for Change .....	73
Introduction.....	73
Overview.....	74
Presentation of the Findings.....	75
Emergent Themes .....	77
Unique Insights .....	111
Applications to Professional Practice .....	114
Implications for Social Change.....	115
Recommendations for Action .....	116
Recommendations for Further Research.....	117
Reflections .....	118
Summary and Study Conclusions .....	119
References.....	121

## Section 1: Foundation of the Study

Corporate social responsibility (CSR) is a business strategy that is continuing to grow in popularity with consumers. Business managers incorporate socially responsible practices as a part of an organization's strategy for sustainability (Vallaster, Lindgreen, & Maon, 2012), and as a marketing tool to attract and maintain consumers (Juscus, Šneideriene, & Griauslyte, 2013). CSR contributes to the likelihood of a consumer engaging in a long-term relationship with the firm (Gadeikiene & Banyte, 2013; Zaharia & Zaharia, 2013).

### **Background of the Problem**

Fair trade (FT) coffee is a commodity that emerged out of a movement to protect product pricing and quality by ensuring that farmers operate within fair labor conditions and compensation practices are provided to farmers (Bacon, 2013; Stratton & Werner, 2013). CSR can benefit financial performance (Gazzola, 2012; Tang, Hull, & Rothenberg, 2012), there is not enough information as to whether the CSR attributes of FT coffee represent a potential factor of consumer loyalty or preference. While consumers' purchased traditional coffee exclusively for an average of over 15 years, consumers exclusively purchased FT coffee for a little over 3 years (Cailleba & Casteran, 2010). In all locations in which Fairtrade International measures FT coffee sales increased by an average of over 20% from 2011 to 2012; however, during the same time, the collective FT coffee sales data showed a decrease of 36% in the United States (Fairtrade International, 2013). By exploring the experiences and insights of FT coffee

marketing managers, I identified and explored themes that can assist marketing managers in understanding how to better market FT coffee, thus increasing the sustainability of coffee farmers and maintaining coffee business owners' investment in (a) CSR, (b) triple-bottom line, (c) people-planet-profit (PPP), and (d) business ethics.

### **Problem Statement**

Many small business owners are ignoring the essential phase in the supply chain of knowing what business strategies they should apply when offering fair trade coffee (Claar, 2013; Karjalainen & Moxham, 2013). Business leaders spend an average of \$28 billion dollars a year on corporate social responsibility (CSR) initiatives, such as triple-bottom line, people-planet-profit (PPP), and business ethics; however, many business owners are not getting a favorable return on their CSR investments (Di Giuli & Kostovetsky, 2014). The general business problem is that consumer loyalty to fair trade coffee is low, negatively affecting the sustainability of the fair trade coffee market and CSR investment. The specific business problem is that some coffee marketing managers do not have well-defined strategies and decision making processes to successfully market fair trade coffee products.

### **Purpose Statement**

The purpose of this qualitative, phenomenological study was to explore the lived experiences, perceptions, and insights of FT coffee marketing managers, to provide business owners with strategies and decision making processes to successfully market FT coffee products. The targeted population consisted of U. S. coffee marketing managers

involved in the strategy development and decision-making process of purchasing, selling, or promoting FT coffee. Their information provide business owners with information that would be helpful to business owners when they are deciding what to advertise and where to advertise. The implication for positive social change includes the potential to increase market share of FT coffee, supporting third-world farmers and promoting a sustainable market for FT coffee.

### **Nature of the Study**

Three methodological approaches to research are qualitative, quantitative, and mixed methods (Venkatesh, Brown, & Bala, 2013). The goal of qualitative research is to gain an understanding of social or cultural contexts, activities, relationships, or events that researchers cannot study experimentally for practical or ethical reasons (Marshall & Rossman, 2011). Quantitative research typically involves examining relationships between variables (Allwood, 2012), rather than exploring participant experiences (Bansal & Corley, 2012). Quantitative research is also appropriate for areas of study where researchers already know much on the topic, but further analysis would help researchers better understand the relationships among variable factors (Ingham-Broomfield, 2014). Qualitative research approaches permit the researcher to maintain an emergent design, keeping the focus on the participants' descriptions of the experience (Marshall & Rossman, 2011).

Researchers using mixed methods approach combine qualitative and quantitative research methods in the same research examination (Venkatesh, Brown, & Bala, 2013).

The mixed method approach is appropriate for areas of study that cannot be fully understood through the use of only qualitative or quantitative methods (Venkatesh et al., 2013). Although employing a mixed method design may increase data richness, researchers using a mixed method design must give equal attention to both qualitative and quantitative aspects of the study, potentially reducing the ability of the researcher to explore the phenomenon in-depth (Harrison III, 2013). Corbin and Strauss (2014) posited that the qualitative approach is appropriate for any phenomenon about which little knowledge already exists. The rationale for selecting the qualitative method for this study was the goal of conducting an in-depth inquiry into the phenomenon. Though research exists on FT coffee promotion, some coffee marketing managers do not have well-defined strategies and decision making processes to successfully market FT coffee products.

Selecting the qualitative research method included considering several designs before deciding on a phenomenological design. A narrative design involves analyzing individuals' accounts in a social and cultural context (Cassell & Symon, 2011). Similarly, ethnography also focuses on the social and cultural aspects of the participant's context, in which the researcher observes the participant in their natural environment (Boddy, 2011). While social and cultural factors might influence a business leader's decision-making process, the decision-making process can be studied without observing the participants in their natural environment. Furthermore, it can be disruptive and uncomfortable for participants to speak their thoughts aloud to document their decision-making processes,

affecting external validity (Saarela et al., 2013). For these three reasons, the final decision was not to use narrative or ethnography designs.

According to Wilson (2012), phenomenological approaches are appropriate for consumer research as phenomenological researchers seek to investigate, describe, and evaluate the meaning of individuals' lived experiences. Moustakas (1994) noted that phenomenology focuses on experiences as described by the participant. Moustakas further explained that the researcher brackets personal experiences with the phenomenon to assist in establishing an unbiased perspective. A qualitative, phenomenological approach was appropriate for this study because it explored a phenomenon that researchers cannot easily observe or understand (Ivey, 2013). Each participant had a unique experience with the phenomenon.

### **Research Question**

In this qualitative, phenomenological study, the perceptions and lived experiences of FT coffee marketing managers were explored with respect to their decision-making processes in marketing FT coffee products. The following research question guided this study: What information do coffee marketing managers need to design and implement strategies about the decision-making processes for the promotion/marketing of FT coffee?

### **Interview Question**

Participants, who were prescreened to confirm that they were in a marketing manager role in the FT coffee industry, answered the following question:

Please be thorough and comprehensive when describing your experience.

Picture and walk through a recent FT coffee marketing strategy and decision-making development process experience.

This question and follow-on questions were asked face-to-face or via Skype. The interviews lasted no longer than 1 hour. All answers are confidential.

### **Conceptual Framework**

Scholars can use a conceptual framework to help in understanding a phenomenon, in that the framework illustrates or clarifies different facets of a research problem (Bordage, 2009). Multiple conceptual frameworks might be evident and applicable in different components of a single problem, and similarly, one conceptual framework might be applicable to diverse, unrelated problems (Schwartz et al., 2011). While the ability to understand consumer behavior is helpful, but the ability to accurately predict consumer behavior is powerful. Researchers in consumer science use theories to assist in both comprehending and predicting buyer behavior (Ghosh & Varshney, 2013; Zu & Kaynak, 2012).

Planned behavior theory was chosen for this doctoral study as the theory pertained to leader behavior and the decision to perform an action. Planned behavior theory originated from the theory of reasoned action, which suggests that behavioral intentions (which immediately precede the behavior) are fueled by an individual's belief that performing an action will lead to an identified outcome (Fishbein & Ajzen, 1975). As an extension of this concept, Ajzen introduced planned behavior theory in 1985, adding the

component of perceived behavioral control, or an individual's perception that she or he has authority over the behavior (Madden, Ellen, & Ajzen, 1992). An individual's beliefs about a behavior, subjective norms, and perception of behavior control allow a researcher to predict an individual's intentions (Ajzen, 1991). The research for this doctoral study included accounting for subjective norms and an individual's perception of control, predicting the marketing manager's intent to market the FT label.

Planned behavior theory was valid and applicable to this doctoral study because the research efforts included interviewing coffee marketing managers on their experiences and decision-making behavior. Andorfer and Liebe (2012) affirmed the appropriateness of planned behavior theory for research on FT consumption. Ajzen (1991) also found that including previous behavior in the prediction model increased the theory's validity. Through interviews, the researcher gained a better understanding of the business leader experience with the purchase and promotion of FT coffee; the researcher also gained insight on consumer responses to FT coffee campaigns, which helped the researcher identify strategies for business owners to increase FT coffee sustainability.

### **Definition of Terms**

Definitions are used to clarify terminology (Ary et al., 2013).

*Attitudinal loyalty:* Attitudinal loyalty is the consumer's positive beliefs about a product that contributes to consumer commitment to recommend the product (or brand) to others (Liu-Thompkins & Tam, 2013).

*Behavioral loyalty:* Behavioral loyalty is the consumer's commitment to purchase the product despite competing offers (Liu-Thompkins & Tam, 2013).

*Consumer loyalty:* Consumer loyalty is a combination of the consumer's commitment to use a particular product regardless of financial and location barriers and the consumer's willingness to recommend a service provider to others (Akbar, 2013). Consumer loyalty consists of both consumer behavior and consumer attitudes about the product. In this study, consumer loyalty is synonymous with customer loyalty.

*Corporate social responsibility:* Corporate social responsibility is the sense of duty businesses have to society that reaches beyond their obligations to the firm stakeholders (Carroll, 2010).

*Fair trade:* FT is a collaborative effort that seeks increased equality in internationally traded goods (Stenzel, 2012). The FT effort aims to provide improved trading conditions to secure the rights of disadvantaged producers and laborers (Pedregal & Ozcaglar-Toulouse, 2011).

*Fairtrade International:* Fairtrade International is an organization that establishes and upholds standards to uphold fair economic exchanges for the agricultural employees in third-world countries (Ingenbleek & Reinders, 2013, p. 464). These standards align with the FT definition above.

*Habitual loyalty:* Habitual loyalty is a consumer's commitment to purchasing a particular product (or brand) despite competing offers because of the stability and convenience it provides the consumer (Liu-Thompkins & Tam, 2013).

*Marketing manager:* A marketing manager is an individual in a firm who possesses marketing knowledge and is involved in operational activities related to market orientation (Bodlaj, 2012).

*Mixed consumer:* A mixed consumer is an individual that purchases both traditional coffee and FT coffee (Cailleba & Casteran, 2010).

*Online interview:* An interview conducted in real time in which the interviewer and participant connect via the web; one format of an online interview is video conferencing (Salmon, 2012).

*Traditional coffee:* Traditional coffee is coffee produced that does not adhere to the FT standards (Cailleba & Casteran, 2010).

### **Assumptions, Limitations, and Delimitations**

#### **Assumptions**

Assumptions are the researcher's beliefs that the researcher cannot verify (Corbin & Strauss, 2014). In phenomenological research, assumptions about the participants and the context of the phenomenon affect the ability to apply knowledge gained from the current study to the field (Bendersky & McGinn, 2010). Assumptions about the participants are important because phenomenological research involves describing the phenomenon in the words of the individuals selected (Moustakas, 1994). One of the assumptions of this study was that participants had knowledge, attitudes, and perceptions regarding coffee selection and would willingly respond honestly to the interview question.

**Limitations**

Limitations are weaknesses or trade-offs of the study that stem from the conceptual framework or study design (Marshall & Rossman, 2011). Since I used a qualitative, phenomenological approach to understand marketing managers' experiences in developing and implementing strategies and decision making processes, my analysis was subjective and, thus, potentially erroneous (Moustakas, 1994; Sinkovics & Alfoldi, 2012). Subjective and erroneous analysis would influence the external validity of findings (Sinkovics & Alfoldi, 2012). I limited this study to a purposive sample of 20 adults in the United States who were coffee marketing managers in the FT coffee industry. The study was also limited by the participants' honesty when responding to the interview question.

**Delimitations**

Delimitations are the boundaries established for the study (Yin, 2011). This qualitative study used only U.S. FT coffee marketing managers, involved in the decision-making process related to the purchase and promotion of FT coffee. The study only employed a qualitative research design and did not have quantitative data to corroborate the findings.

**Significance of the Study****Contribution to Business Practice**

While previous researchers have indicated that consumers value CSR initiatives (Gazzola, 2012; Tang, Hull, & Rothenberg, 2012) and that coffee brands increased their sales by 10% when labeled as FT (Hainmueller, Hiscox, & Sequeira, 2014), there is not

enough information to conclude that FT is a potential factor for consumer coffee choice. Exploring the lived experiences of FT coffee marketing managers might assist marketing managers in understanding best practices for promoting FT coffee to consumers. Researchers have mentioned the need for marketers to understand and consider the consumer's perspective (Tomkins & Eatough, 2013; Wägar et al. 2012). With knowledge of consumers' perspectives, coffee marketing managers can make more effective decisions on how to better market the FT label brands of coffee, thus leading to increased sustainability of the FT coffee market.

### **Implications for Social Change**

Although I focused the study on the experiences and perceptions of coffee marketing managers regarding their strategies and decision-making processes for promotion/marketing FT coffee, findings from this study may have valuable implications for others in the supply chain. The findings revealed factors that could affect the purchaser's choice of coffee that disadvantaged coffee bean farmers might be able to address to increase sales of FT coffee in the United States. Increasing the sales is important to farmers' business sustainability and their ability to provide for their families and improve their living conditions (Taylor, Murray, & Reynolds, 2005). Additionally, conducting the study may have increased awareness of the FT movement and label, thus influencing social change through increased FT coffee purchase and consumption.

### **A Review of the Professional and Academic Literature**

A review of the literature helps researchers avoid duplicating previously conducted research (Rhoades, 2011). Researchers identify the research topic and theme for the literature review through the research question and study problem statement (Dunne, 2011). For this doctoral study, the research question was: What information do coffee marketing managers need for developing strategies and decision-making processes for the promotion/marketing of FT coffee?

The purpose of this phenomenological study was to explore the lived experiences, perceptions, and insights of FT coffee marketing managers and to provide business owners with strategies and decision making processes to successfully market FT coffee products. This doctoral study included 20 face-to-face or Skype interviews with FT coffee marketing managers. I used qualitative data analysis to identify themes, and from these themes identified strategies and decision making processes that could increase sustainability in the FT coffee market.

There are multiple ways to organize a review of the literature. Scholars recognize both chronological and thematic organization as appropriate (Fink, 2014). This literature review was organized thematically, with a chronological review of published sources within each topic containing a historical element. The following databases were used: ABI/INFORM Complete, Business Source Complete/Premier, and Emerald Management First served as the business and management databases for the article queries. The following search terms yielded the articles reviewed in this section: *corporate social*

*responsibility, fair trade, coffee, sustainability, willingness to pay, marketing consumer research, phenomenology, brand, loyalty, trust, organic, planned behavior theory, and consumer behavior.*

The literature review includes information on 107 journal articles, books, and professional organizations. Of the 107 sources, 95 were peer-reviewed articles (as confirmed by *Ulrich's Periodical Directory*) and 96 sources are published within the last 5 years. The following subsections contain a review of the literature related to the research question and problem statement.

### **Social Responsibility to Corporate Social Responsibility**

To recognize the relevance of CSR to the FT coffee industry and this doctoral study, it might benefit the reader to understand the historical progression of CSR. The concept of CSR acknowledges that businesses are an integral part of society, having the ability to positively influence social desires and objectives (Jones, Comfort, Hillier, & Eastwood, 2005). When it comes to human interaction, social responsibility is not a foreign concept; the very existence of laws and the desire for people to live in order evidence the human expectation of individuals acting responsibly within society. Although the concept of social responsibility has existed for centuries, the concept of CSR did not gain popularity until the twentieth century (Carroll, 2010).

Barnard (1938) and Clark (1939) mentioned the relationship and role between business and society, but people did not use the formal term, *corporate social responsibility*, until the 1950s (Saeed & Arshad, 2012). Bowen (1953) referred to CSR as

businessmen's obligation to pursue socially desirable policies, decision-making, and actions to benefit society. Frederick (2006) identified three CSR themes emerging from the 1950s: managers filling the role of a public trustee, the need to balance conflicting claims for firm resources and firm support for good causes. Each of these themes, along with scholar perspectives in the 1950s focused on the firm's responsibility to society, with little consideration given to the benefits of CSR activities for firms.

In the 1960s and 1970s, as businesses and government increased in their participation in CSR activities, business scholars began to consider the ramifications of CSR on firms. Some scholars feared that social responsibility was a risky endeavor for firms as it could detract from the focus on profitability and firm success, while others advocated that CSR participation was in the firm's best interest for the sake of its importance to society (Carroll & Shabana, 2010). Though researchers during this period began to consider the influence of CSR on firms, scholars failed to make a connection between CSR activity and firm financial performance (Moura-Leite & Padgett, 2011). Scholars and practitioners advanced to consider the CSR influence on firms related to strategic decision-making. The findings of this doctoral study identified perception of CSR as a potential influential factor for FT coffee market sustainability. Because perception of CSR is a potential influential factor, business owners might benefit from leveraging CSR as a marketing strategy.

### **Corporate Social Responsibility as a Marketing Strategy**

As the concept of CSR became more popular, the concept of CSR as a component of business strategy began to emerge. Scholars and businesspersons began to debate the appropriateness of CSR as a business strategy as early as the 1950s (Carroll & Shabana, 2010). Friedman (1962) argued that business managers have the sole responsibility of maximizing profits for owners and stakeholders, leaving no room for concern about societal issues. Davis (1973) further discouraged businesses from becoming involved in CSR initiatives, suggesting that businesses are not structurally organized to handle social activities. By the late 1970s, business managers were beginning to implement socially responsible practices in management functions (Moura-Leite & Padgett, 2011), but managers still did not recognize CSR as a viable business strategy.

Eventually, the concept of CSR as a business strategy grew and the perspective that CSR initiatives were detrimental to firm success diminished. In the 1980s, businesses became more responsive to stakeholder demands for social responsibility; by the 1990s individuals widely accepted the idea of CSR (Moura-Leite & Padgett, 2011). After the turn of the century, researchers and business managers recognized that firms engaging in CSR actually strengthened their position in the market as CSR enabled the firm to reduce risk, increase productivity and profitability, and increase consumer loyalty (Juscus, Sneideriene, & Griauslyte, 2013). Now that business managers recognize the benefits of CSR, current literature focuses on selecting and implementing the most meaningful initiatives for firm sustainability and consumer satisfaction. The research efforts of this

doctoral study explored FT coffee business leader perceptions and experiences related to consumer choice and identified some factors influencing customer loyalty or preference.

When implementing CSR initiatives to assist business strategy, firm leaders and marketing managers must develop ways to evaluate and report the financial and social influence of the initiatives. Pergelova and Angulo-Ruiz (2013) found that while engaging in socially responsible initiatives can contribute efficiency of firm-related financial activities, it is equally important for marketers to be able to measure the CSR influence on social activities. Without the ability to measure financial and social influence, marketers are unable to optimize CSR leverage potential. Although it is challenging, marketers must find ways to communicate the value of the CSR initiative to stakeholders for CSR activities to maximize their potential influence. The research efforts of this doctoral study identified some consumer values related to the decision to or not to purchase FT coffee.

In addition to the ability to measure and report socially responsible practices, properly aligning CSR initiatives with business is challenging and complex. In a quantitative study on stakeholder preferences for specific CSR activities and social initiatives, Munro (2013) found significant differences in preferences across nationalities. Respondents in developing countries rated social issues as more important than environmental, ethical, or stakeholder issues, while respondents from economically established countries valued environmental and stakeholder initiatives as more important (Munro). Jin, Littrell, and Niehm (2012) found younger consumers to be more receptive

to CSR initiatives than older generations when making purchase decisions. Bucic, Harris, and Arli (2012) cautioned that differences exist among millennial shopping habits and marketers should treat younger generations as a heterogeneous group. It follows that it is important for businesses to understand stakeholders' unique preferences to optimize CSR strategy.

Though stakeholder preferences can vary by nationality or country of origin, some similarities exist in overall preferences. Respondents in Munro's (2013) study preferred local over international social initiatives. Similarly, Popoli (2012) found local CSR initiatives to be important to stakeholders, noting that global brands should include local initiatives in a comprehensive approach. Considering these findings, businesses should not only select a CSR strategy that is relevant to regional stakeholder preferences, but one that also possesses local influence. Specific to this doctoral study, business owners selling FT coffee might benefit from selecting CSR initiatives that not only have a positive global influence, but also benefit the local consumer community.

When selecting CSR initiatives, businesses managers might benefit from considering both stakeholder interests and firm identity. Consumers will associate these initiatives with the firm's identity, which in turn will influence firm reputation (Hildebrand, Sen, & Bhattacharya, 2011). Hildebrand et al. (2011) findings align with Saeed and Arshad's (2012) research findings: engaging in socially responsible activities enables the firm to build intangible resources such as social and reputational capital. The strongest CSR strategies are those that are cocreated with stakeholders, as these will

promote lasting identification-based relationships with the firm (Hildebrand et al., 2011). If consumers and stakeholders positively perceive CSR, then CSR enables the firm to be more competitive in the marketplace.

When implemented well, CSR initiatives have a positive influence on the firm's reputation in addition to financial performance. In a comprehensive literature review on CSR, Aguinis and Glavas (2012) found that CSR improved the firm's reputation, resulting in an increase in consumer and stakeholder loyalty and customer satisfaction which propelled increased revenue generation. Hildebrand, Sen, and Bhattacharya's (2011) findings agree that stakeholders respond to CSR activities in positive ways; this is evidenced by consumer willingness to pay a higher price for a product or service from companies engaging in CSR. CSR initiatives create emotional value for consumers (Green & Peloza, 2011) and consumers desire to engage in consumer social responsibility through making responsible purchase decisions (Vitell, 2015). In terms of this study, participants' consumers were often willing to pay a higher price for FT coffee than traditional coffee because of a FT association with socially responsible practices. The financial value consumers placed on CSR is important for FT coffee marketing managers to understand, as consumer willingness to pay affects their decisions regarding pricing and promotion of FT coffee within their business.

Consumer perception of CSR also directly influences consumer loyalty. In a quantitative study in the banking industry, researchers surveyed consumers and found a strong significant and positive association between CSR and attitudinal loyalty

(Mandhachitara & Poolthong, 2011). While perceived service quality mediated the effects of repeat purchase intentions, involvement in CSR activities increased positive consumer attitudes toward the firm (Mandhachitara & Poolthong, 2011). Service and product quality continue to be a contributing factor to behavioral loyalty; firm managers should not view CSR activities as a guarantee for increased repeat sales, but they should consider CSR activities as a first step in increasing consumer attitudinal loyalty, which often leads to behavioral loyalty. Increasing consumer attitudinal loyalty to FT coffee might lead to behavioral loyalty to the product, contributing to sustainability of the FT coffee market.

The banking industry is not the only sector in which firms benefit from engaging in CSR initiatives. Although taste and price are the top influencing factors affecting consumer food purchases, 52% of Americans consider sustainability as an important factor in food purchase decisions (International Food Information Council Foundation, 2011; Rizkallah, 2012). Manning (2013) agreed that business managers can use CSR activities as a source of differentiation to improve market share and consumer loyalty, provided that the activities remain congruent with the firm's mission. It is important to note that while CSR engagement can yield both push and pull mechanisms in food product marketing, the interaction between consumer purchases and social initiatives is not consistent across all consumers and food products (Manning). Researchers need to conduct further study on specific influencers by product to identify optimal models for CSR incorporation in the food industry. Aligning with the need for further study, the

efforts of this doctoral study further explored potential influences on consumer choice in the FT coffee market through in-depth inquiry of FT business leader experience related to FT coffee promotion.

The influence of firm CSR engagement on consumer choice is typically positive, but its effect is not as strong as organic labels. In an international study comparing the influence of CSR claims and other existing food claims, researchers found that consumer willingness to pay (WTP) for organic products was more than twice as high as consumer WTP for environmentally responsible products (Loose & Remaud, 2013). Considering these results, marketers in the food industry choosing between organic product labeling and advertising company CSR activities, might benefit to select the organic campaign as it will result in higher perceived consumer value and higher price points. Although not all FT coffee is organic, these findings might prove beneficial for organic FT coffee brands as they can advertise on both the organic and CSR platforms. Research findings also included differences between national markets. Consumers in the United States valued environmental CSR initiatives over social activities (Loose & Remaud), indicating that firms advertising in the United States should focus on selecting and communicating CSR engagement that benefits the environment.

### **Social Responsibility and Brands**

Building a strong brand image for FT coffee products might be a step toward increasing its sustainability. Consumers use brands for product identification, and the strongest brands enjoy customer loyalty (Chitakornkijasil, 2012). Brand social

responsibility (BSR) differs from CSR in that BSR is grounded in consumer perception, and consumer perceptions of CSR often contradict manager and marketer perceptions. BSR is the level at which consumers perceive a brand and its charitable initiatives improve the wellbeing of society (Dincer & Dincer, 2012). Dincer and Dincer (2012) administered a quantitative questionnaire to develop a BSR measurement scale to reflect the consumer perspective. The researchers performed an exploratory factor analysis and found that the most important dimensions of BSR are a brand's awareness, presence, and trustworthiness in charitable initiatives (Dincer & Dincer, 2012). In terms of this doctoral study, consumers perceived participation in the FT effort to be a charitable initiative and coffee marketing managers may benefit from emphasizing the connection. To maximize the potential contribution to brand value, consumers may need to perceive the brand to be credible and be made aware of BSR activities.

CSR initiatives can assist market managers in building stronger brands. An increasing number of consumers demonstrate a demand and a willingness to pay for socially responsible products (Reinstein & Song, 2012). Khan and Manwani (2013) posited that CSR engagement is one of the best and most affordable options for creating and improving brand image. CSR engagement is associated with positive corporate reputation and brand equity, positively influencing brand performance as consumers are willing to pay higher prices for products or services that promote socially responsible practices (Khan & Manwani, 2013). In the case of a brand building, engaging in CSR transcends selecting activities and socially responsible sponsorships to include

participating in socially and ethically responsible marketing and advertising practices (Khan & Manwani, 2013). Consumer perception of brand integrity is likely to influence consumer attitudinal and behavioral loyalty. The brand integrity-consumer loyalty relationship is good news for the FT coffee label as consumers associate the FT coffee movement with socially responsible practices.

For CSR to have the desired effect of increasing brand strength, consumers might need to be educated on what steps the company is taking to engage in socially responsible practices. Kotler (2011) posited that an increasing number of consumers will prefer to buy from companies that care about economic, social, and political issues and recommended that businesses add an environmental component to their accounts. In a quantitative study, surveying consumers on the brand-consumer relationship and CSR, Rizkallah (2012) found that while CSR activities were not the primary influencers of purchasing a certain brand, most consumers would be inclined to switch to another brand if they discovered the company producing their favorite brand to be engaging in socially irresponsible activities. Additionally, nearly 40% of consumer respondents reported that they would be willing to pay 5–10% more for the company to modify practices to become socially responsible (Rizkallah, 2012). Nearly three-quarters of respondents indicated that they were aware of most societal issues, yet less than half of respondents were knowledgeable about their favorite brand's business practices (Rizkallah, 2012). As also evidenced through Dincer and Dincer's (2012) research, for CSR activities to have the greatest influence on the consumer-brand relationship, marketers must make consumers

aware of how the company is engaging in CSR. The research efforts of this doctoral study identified the extent to which FT coffee marketing managers emphasize societal benefit and price in their promotional activities. The study data also identified the importance of increasing consumer awareness of the CSR activities that firms producing brands of FT coffee are engaging in.

CSR has a positive influence on brand equity and brand value. In a qualitative case study, Creel (2012) determined that firms engaging in socially responsible behavior were able to increase brand awareness, improve brand image, establish brand credibility, elicit positive consumer response toward the brand, generate a feeling of brand community, and stimulate consumer commitment the brand. Company actions in the study such as donating products and money, employee volunteerism, and enhancing environmental performance resulted in increased brand equity for the firm. In an empirical study, Melo and Galan (2011) found that CSR also has a positive influence on brand value, though market-based performance and the size of the firm have a greater influence. In the study, many of the CSR initiatives did not align with corporate strategy; in agreement with Hildebrand, Sen, and Bhattacharya's (2011) research, perhaps if the initiatives better align with the firm's identity, the positive influence on brand value will increase. It is important to note that consumers might perceive the relationship between the social responsibility of parent brands and of subsidiary brands differently (Dincer & Dincer, 2012). Scholars might benefit to conduct more research related to consumer perception of social responsibility and subsidiary brands to determine effects. While this

doctoral study was not designed to investigate specific parent and subsidiary brands of FT coffee, participants in the study provided limited information on this topic through discussion of the open-ended interview question.

### **Fair Trade**

One brand that embodies socially responsible practices is the FT label. FT is a collaborative effort involving farmers, regulators, and buyers seeking increased equality in internationally traded goods (Stenzel, 2012). Those involved in the FT effort aim to provide improved trading conditions to secure the rights of disadvantaged producers and laborers (Pedregal & Ozcaglar-Toulouse, 2011). The FT label continues to grow as consumers demonstrate an increased interest in purchasing products produced promoting environmental and socially responsible practices (Stratton & Werner, 2013).

Understanding the history behind the FT movement and label, along with its connection to the coffee industry, might assist readers with understanding the importance and relevance of this doctoral study.

As the concept of CSR was developing, the FT movement began to take shape. FT emerged during World War II as an economical means for improving poverty through fairer trading (Pedregal & Ozcaglar-Toulouse, 2011). The primary goal of FT remains similar to its early years, working to develop the poorest communities through wealthy consumer purchases (Wielechowski & Roman, 2012). As the movement grew, several certifying federations developed to assist with regulating the standards in the supply chain (Pedregal & Ozcaglar-Toulouse, 2011).

The FT movement protects both pricing and quality for products under its label. FT ensures fair labor conditions (Leeuw et al., 2014) and compensation for workers (Stenzel, 2012). Specific to the coffee industry, FT focuses on assisting small, family-owned coffee producers by regulating coffee production standards and price premiums for roasters and other buyers (Kolk, 2013). There are price minimums for FT coffee that roasters and retailers pass on to consumers, often causing the price of FT coffee to be higher than traditional coffee (Kolk, 2013). In terms of this doctoral study, FT coffee business leader experience related to promotion and pricing of FT coffee was explored to determine if the socially responsible attributes are valuable in sustaining consumer sales.

Though the FT movement is relatively new, it appears to be increasing in popularity and influencing consumers worldwide. Beginning in Europe, the FT movement made its way to the United States and now generates nearly 5 billion dollars per year in the U. S. market (Wielechowski & Roman, 2012). The FT movement is an even larger industry in European countries. One reason for the European FT coffee market exceeding the U. S. market might be that consumers in the United Kingdom are more active FT customers than consumers in the United States (Bondy & Talwar, 2011). In a 2012 national United States FT consumer study, 49% of respondents indicated that FT was not their concern (Keene State College, 2012). Consumer attitudes in Europe toward FT products differ from those in the United States, which may affect the way coffee marketing managers promote FT products. Because the location for this doctoral

study was in the United States, findings differed somewhat from FT coffee studies conducted abroad.

While the FT coffee industry seems to be growing, it does not appear to be reaching its maximum potential in the United States. Though the FT coffee market demonstrates sustainability in other countries, the FT label for coffee faces loyalty challenges in the United States (Claar, 2013) despite being a large industry. Researchers across multiple industries are concerned about differences in individual FT consumption (Andorfer & Liebe, 2011). Marketers face challenges promoting FT coffee since the novelty of the FT movement has dissipated and consumers are more passive purchasers of FT products, rather than intentional (Doherty, Davies, & Tranchell, 2013). The research efforts of this doctoral study explored the promotion of the FT coffee label in the United States, which could contribute to identifying marketing strategies for increasing consumer loyalty to the product and label.

More research on consumer attitudes and buying motives might strengthen the FT movement in the United States. Pharr (2011) indicated that while the FT movement is relatively strong in Europe, it is less mature in the United States as there is a lack of knowledge on consumer motives to purchase FT. Darian, Tucci, Newman and Naylor (2015) also indicated that differences exist in customer knowledge on FT and its implications for coffee. Customers who are knowledgeable about the meaning and principles behind the FT label are more likely to desire FT as an offering in their local coffee shops or cafés (Murphy & Jenner-Leuthart, 2011). Darian et al. (2015) posited that

the approach for marketing FT coffee should align with the customer's existing level of knowledge to be effective. Pharr (2011) concluded that more research should focus on the psychographic and motivational factors related to consumer purchase of FT products. I research in these key areas through the exploration of FT coffee business leader experiences with FT coffee promotion to consumers.

### **Direct Trade**

When examining FT coffee growth and potential, it is important to consider consumer alternatives. DT coffee, coffee that roasters purchase directly from the farmer in a noncertified private initiative, emerged as an alternative in the coffee industry (London, 2012; Tellman, Gray, & Bacon, 2011). Purchasers participating in a DT relationship often do so because they believe that they are able to pay farmers more in DT relationship than under the FT label (London, 2012). Coffee purchased in a DT exchange can also possess the FT label, but does not always when farmers and roasters engage in DT as an alternative. Tellman, Gray, and Bacon (2011) conducted a study examining the historic and institutional barriers to FT coffee, identifying DT as an alternative solution for smaller coffee farmers who cannot afford the costs associated with becoming FT certified.

There are some challenges associated with comparing DT to FT because DT lacks specific standards, regulations, or certification. Researchers and practitioners have conflicting opinions and perceptions of DT and its relationship to FT coffee. Raynolds (2014) referred to FT processes as DT activity that connects the consumer to the farmer

through sharing producer stories. London (2012) described DT as distinctly separate from FT, and that while roasters claim to be able to pay farmers a higher wage for coffee in a DT relationship than in a FT transaction, these claims lack evidence. A research challenge associated with DT coffee being a noncertified, private initiative is there is not extensive research published about DT coffee, though several researchers mention DT as a separate activity from FT (Elder, Lister, & Dauvergne, 2014; Manzo, 2015; Robinson, Styles, Evernden, & Kirkham, 2013).

### **Sustainable Coffee**

Prior to the FT movement, large retailers carried and sold coffee without much consideration given to growing and harvesting processes. To mass produce, many farms serving as retail suppliers ceased cultivating shade-grown, handpicked coffee beans and began using overcrowded, full-sun exposed, industrialized harvesting procedures, which negatively influenced coffee quality (Läderach et al., 2011). As consumer education increased, so did the demand for better tasting coffee and compliance with environmental and social standards (Bacon, 2013). With FT and CSR movements on the rise, consumer demands for higher quality coffee and sustainable environmental practices forced big retailers to respond; the demand drove the market for sustainable coffee.

In the past, producers held more power than buyers in the coffee market, resulting in high prices. Over the last several decades, buyers gained more purchasing power, allowing large retailers to drive demand for higher grade specialty coffee produced in compliance with sustainability standards (Elder, Lister, & Dauvergne, 2014).

McDonald's now leads the way in the UK as the largest buyer and seller of sustainable coffee; Wal-Mart now has certified sustainable coffee under its private label brand, and Costco now has its own brand of FT coffee (Elder et al., 2014). Coffee shop retailers Dunkin' Donuts and Starbucks followed suit, with both brands making their espresso beverages with Fairtrade certified coffee (Brizek, 2012). Retailers are using the FT label and sustainability programs to rebrand their coffee as high-quality products and to increase demand for sustainable coffee, but consumer purchases do not necessarily reflect increased demand.

The UK and the US are not the only locations with a rising market for sustainable coffee. The Netherlands is one of the largest consumers of coffee, with sustainable coffee sales representing 25% of their overall coffee consumption (Kolk, 2013). Ingenbleek and Reindera (2013) conducted a case study on the market potential for sustainable coffee in the Netherlands and found that sustainability standards are a critical success factor for the Dutch coffee market. Furthermore, the researchers identified that labeling sustainable products is important to make consumers aware and to prompt sales. In the study, the market demand for sustainable coffee presented opportunities for many retailers, while posing threats for companies previously established in the market (Ingenbleek & Reindera). The researchers mentioned the need for future research in other countries specific to the demand and consumer response to the sustainability of the coffee industry. The research efforts of this doctoral study aligned with Ingenbleek and Reindera's recommendation.

Coffee consumption in China is also on the rise. The coffee consumption in China is less than in western countries such as the United States and Europe, but over the last twenty years, China increased its coffee imports (Yang, Hu, Mupandawana, & Yiu, 2012). In their research, Yang et al. (2012) found that while instant coffee is the most popular form of coffee consumed in China, Chinese consumers are purchasing more roasted coffee and seem to be concerned about ethical issues in society and the environment. Yang et al.'s findings mean that if marketers are able to increase consumer awareness of ethical standards associated with the FT coffee label there might be a market for FT coffee in China. As in other locations, it is important to consider the consumer's willingness to pay a higher premium for FT coffee to determine if the market will be viable. Price related to consumer willingness to pay emerged as themes in this doctoral study.

Increased demand for sustainable and certified specialty coffees appears to be largely positive, but there might be negative ramifications for farmers. The FT label protects farmers from selling coffee at lower prices to retailers, but retailers typically purchase smaller quantities of sustainable coffee than farmers produce (Valkila, 2014). Retailer purchase of small quantities can be detrimental to production costs and place farmers at risk for lower incomes as they are not able to sell according to the actual demand. For increased loyalty and demand for FT coffee to bring about positive social change, marketers must not only consider business model effects but also the influence

on growers. In this doctoral study, FT coffee marketing managers recognized the way that pricing FT coffee in their businesses affects farmers.

### **Willingness to Pay for FT and Organic Products**

Certified products such as those under the FT or organic labels frequently have higher price premiums than noncertified products. Determining consumer willingness to pay (WTP) for such products is essential to determining appropriate pricing and market sustainability. Diaz, Pleite, Paz, and Garcia (2012) conducted a study on consumer behavior, knowledge, and WTP of organic tomatoes and found a correlation between consumer level of knowledge and WTP premium prices for organic products. Participants in the study expressed interest in consuming organic products, but after learning the price for organic products indicated that it was unlikely for them to purchase organics. Participants in the study classified as well-informed on the characteristics and features of organic products were WTP higher prices for organic products than participants who possessed little knowledge. Diaz et al. (2012) findings confirm the need for marketers to educate consumers on the features and benefits of organic products to secure more and consistent consumers. Increased consumer education translates to more, consistent consumers, and participants in this doctoral study had customers who would be WTP higher prices for FT coffee if they were better educated on FT features.

Product labeling assists consumers with product features identification, but labeling might not be enough. Gerrard et al. (2013) conducted a study on consumer reactions to organic certification logos in the UK and found that while consumers

perceive organic products to be of higher quality than nonorganic products, consumer trusted packaging that simply included the word “organic” less than packaging with the certified organic logo. Participants in the study were WTP premium prices for products with package labeling that included the certified logo of the regulatory agency but were not WTP premium prices for products without the certified logo (Gerrard et al.). Janssen and Hamm (2012) found similar results pertaining to consumer WTP for organic products in six European countries. Consumers were WTP higher prices for organic products containing the certified organic logo.

Marketers may benefit from exploring methods for educating consumers on product features. Ussahawanitchakit (2012) determined that information richness is positively correlated with marketing effectiveness and competitive advantage. In the study, the researcher determined that as information richness increased, marketing effectiveness increased, as did firm a competitive advantage. Information richness is often associated with media richness; consumer engagement and purchase involvement is directly related to media richness (Coursaris, van Osch, Balogh, & Quilliam, 2014). Sung and Cho (2012) found that advertisements containing text and still photographs were the most successful in influencing consumer attitude long-term.

It is important to recognize that consumer expressed purchase intent and WTP might not correspond to actual behavior. Researchers hypothesized that as a consumer’s WTP increases, the likelihood of purchasing certified products increases, provided that the products are available (Tung, Shih, Wei, & Yu-Hua, 2012). In their research, Tung et

al. (2012) examined consumer attitudes toward organic food related to purchasing intention and behavior and found some inconsistencies. Though participants in Tung et al.'s (2012) study expressed a desire and intent to purchase organic foods, most expressed distrust for the organic label and these concerns prevented them from actually purchasing organic foods. The study took place in Taiwan; consumer attitudes, purchase intent, and actual behavior differ in other countries. Sønderskov and Daugbjerg (2011) found consumer confidence in eco-labeling to be higher in countries with more certification involvement. Despite the United States being highly involved in the organic certification process, consumers in the United States indicated less confidence in the eco-labeling than consumers in the United Kingdom and significantly less confidence than consumers in Sweden (Sønderskov & Daugbjerg). With respect to this doctoral study, evaluating business leader experience related to consumer WTP for FT coffee without consideration of consumer trust of the FT label would have yielded inconclusive results.

Though previously conducted study results indicated consumer WTP more for organic products with the certified label, consumers do not always value organic products above alternatives. Gifford and Bernard (2011) posited that confusion exists among American consumers regarding the differences between food products labeled as organic and those labeled as natural. The researchers performed a logistical regression analysis and found that consumers overestimated the production and quality requirements associated with the natural label, preferring the natural food product over organic.

Consumer preference for natural over organic is not limited to food products. Hustvedt and Bernard (2008) also found this to be the case with organic clothing items. Consumers in the study valued supporting local farmers and businesses above that of organic fibers. Educating consumers on the quality and production requirements will likely increase consumer preference for organic products. After consumers in Gifford and Bernard's (2011) study discovered the differences, they significantly preferred the organic product over the natural product.

Similarly, consumers are not always WTP more for organic food products than alternatives. Onken, Bernard, and Pesek (2011) conducted a choice experiment in the United States to determine consumer WTP for various product attributes: organic, natural, locally grown, and state marketed program promoted foods. The researchers unexpectedly found that in all but one state, consumers were WTP more for food products under the natural label than for products under an organic label (Onken et al., 2011). The researchers hypothesized that consumers would be WTP higher price premiums for organics because organic products have a certification process whereas natural food products do not (Onken et al., 2011). Onken et al. explained one potential reason for consumer preference for natural over organic products is that consumers do not typically consider organic attributes to be relevant to the food product used in the study, strawberry preserves. With respect to coffee purchases, consumers might not associate organic attributes to be relevant to coffee products, which might result in consumer WTP more for FT coffee than organic coffee.

Further differences exist between organic and FT consumer preferences and WTP. Ngobo (2011) found that organic consumers perceive price as a quality indicator (as price increases, organic product quality increases), but van Herpen, Nierop, and Sloot (2012) found that this does not hold true for FT consumers. Ngobo's (2011) findings concur with van Herpen et al.'s (2012) indicating that price promotions did not significantly influence organic purchases. Both organic and FT consumers appear to be less price aware and do not respond as strongly to price reductions as other consumers, but FT consumers do not associate higher price premiums with higher product value (van Herpen et al., 2012). Though FT consumers are not as sensitive to price as other consumers, price still plays a role. As the price premium for FT products increases, market share decreases (van Herpen et al., 2012). Contrary to van Herpen, Nierop, and Sloot's (2012) recommendations, Rotaris and Danielis (2011) suggested that coffee roasters and distributors will increase their market share through joining the FT system, rather than lowering prices. Findings in this doctoral study confirmed price as a theme for business leader FT coffee purchase decision-making.

While consumer WTP for organic food products centers on price, trust, consumer education, and labeling, consumer WTP for FT products seems to center on quality and consumer value of ethical consumption. Sunderer and Rössel (2012) found that moral motives were more important than economic factors in the consumer's decision to purchase FT groceries. Sunderer and Rössel's findings indicate the power of consumer value of ethical consumption. In a Chinese study on WTP for FT coffee, researchers

found that consumers were willing to pay an average of 22% more than the price of traditional coffee for a cup of FT coffee (Yang et al., 2012). FT coffee is a newer product in the Chinese market, so perceptions of the value of FT coffee are subject to change as the product becomes more common; however, Chinese consumer WTP more for FT coffee demonstrates the potential for a sustainable market.

Consumer desire to positively influence others through their FT purchases and social desirability might contribute some to FT coffee sales, but consumers also perceive FT coffee to be superior in quality to traditional coffee. In an experimental study, researchers offered participants two cups of identical coffee, but told participants that one cup contained eco-friendly coffee while the other did not (Sörqvist et al., 2013). In the study, participants took a survey on attitudes toward sustainable consumer behavior. Most participants scoring high on attitudes toward sustainable consumer behavior indicated that they not only preferred the taste of the eco-friendly coffee but also were willing to pay more for it. Even the participants who preferred the taste of the traditional coffee over the eco-friendly coffee during the experiment were WTP more for the eco-friendly coffee after the experiment (Sörqvist et al.). Consumer WTP more for eco-friendly coffee is a good indication that the FT label promotes consumer WTP more for FT coffee in addition to enhancing the consumer's perception of the product, both of which may be important in marketing FT coffee.

Educating consumers on the attributes of FT products is important to increasing FT sales, but consumer WTP premium prices for FT products might not strictly relate to

the typically advertised characteristics of FT. Koppel and Schulze (2013) conducted a natural field experiment in which consumers in coffee shops were given three choices: to donate or not donate to a charity with their coffee purchase, to purchase different coffee, and/or to pay a higher price for their coffee. Consumers in the study were WTP more when making the donation connected to a product purchase than when the donation was a separate activity from the coffee purchase (Koppel & Schulze). Koppel and Schulze's findings mean that consumers are willing to give more when they receive something in return (in this case, a cup of coffee). The researchers concluded that if marketers could secure potential donors as customers, they could maximize donations (Koppel & Schulze). Charities might be able to maximize donations through combining consumer education and awareness of FT attributes with products offered for purchase. Similarly, business owners might be able to maximize profit margin through increasing consumer education and awareness of FT coffee attributes.

Finally, consumer purchasing habits might negatively influence WTP premium prices for FT coffee. In an Italian study, consumers were WTP more for FT coffee than alternative brands, with brand, flavor, habit, and price as influential factors (Rotaris & Danielis, 2011). FT consumers in the study were significantly less habit driven than other participant groups (Rotaris & Danielis). These findings are relevant to this doctoral study; participants indicated habits during their decision-making process for coffee purchase. Rotaris and Danielis (2011) recognized that other factors influence WTP for FT coffee, recommending that future studies explore how consumers' trust and perception of the

credibility of the FT labeling organization influence consumer WTP. Considering Rotaris and Danielis' recommendations, trust and brand loyalty were important considerations in this doctoral study.

### **Trust and Brand Loyalty Toward Fair Trade**

Though there are some, most published studies on FT purchase and consumption lack consideration for consumer trust in the FT brand. Stratton and Werner (2013) indicated that consumer trust in claims that purchasing FT products will contribute to positive social influence is an important area of study, requiring more research.

Annunziata, Ianuario, and Pascale (2011) examined consumer attitudes toward FT and organic labeling and found that more than 40% of consumers in the study did not believe the labels to be truthful and nearly 50% of consumers found the label to be difficult to interpret. While consumers use brands and labels to identify and select products (Chitakornkijasil, 2012), many consumers are skeptical and lack trust in the labels. Distrust for the label might negatively influence both consumer and business leader purchase decisions toward FT products.

As briefly noted in the above sections, trust might also be a factor in consumer intent to purchase versus actual purchase behavior. White, MacDonnell, and Ellard (2012) found that although consumers generally report positive attitudes toward ethical products, their purchase intent and behavior does not always align with these attitudes. Consumers express that they are interested in FT options and have access to these options (White et al., 2012), but do not respond by purchasing products with ethical attributes

(Carrington, Neville, & Whitwell, 2010). White et al. (2012) posited that lack of consumer action toward FT products is probably a result of distrust that their individual purchases of FT products will lead to a positive result for the third-world producer. Consumers seem to be interested in FT initiatives, but many do not trust that purchasing FT products has a positive influence. If marketers are able to strengthen consumer perception that individual purchase connects to direct positive influence, then consumers might be more likely to purchase FT products.

Consumers' perceptions of brand ethicality seems to contribute to their ability to trust, resulting in stronger brand loyalty. Singh, Iglesias, and Batista-Foguet (2012) conducted a study to examine the relationship between consumer perception of corporate ethicality, brand trust, and brand affect. The researchers found that consumer perception of ethicality has a direct positive relationship with brand trust and brand affect (Singh et al., 2012). Furthermore, Sing et al. identified a positive correlation between brand trust and brand affect and consumer loyalty. The positive correlation is good news for the FT label, as consumers typically perceive FT to be an ethical and socially responsible initiative (Raynolds, 2012). Increasing consumer loyalty to FT coffee might be achieved through increasing consumer awareness and perception of the label's ethicality.

Several elements of trust lead to consumer loyalty. McKinney and Benson (2013) posited that real trust extends beyond keeping promises made to consumers; firms must listen to consumers and act empathetically, and actions must remain transparently faithful to the firm mission. Similarly, Mazodier and Merunka (2012) emphasized the essential

role congruency between firm initiatives and firm mission has on consumer trust. As congruence is a factor that the FT organization can control, those marketing the FT label might benefit from highlighting the alignment of the FT mission and initiatives. In this doctoral study, the interview question yielded results that indicate business leader perceptions regarding consumer value of their company's mission.

### **Planned Behavior Theory as a Conceptual Framework in Consumer Research**

Derived from the theory of reasoned action (TRA), the theory of planned behavior (PBT) served as a conceptual framework for this doctoral study. To understand both its appropriateness and importance in the study, it is necessary to consider its origins and applicability in other consumer research studies. TRA is a model that uses an individual's attitudes and beliefs toward norms to predict an individual's intention to perform a specific behavior (Southey, 2011). Fishbein and Ajzen (1975) first introduced TRA in the 1960s, and Ajzen built on the TRA model to account for an individual's perceived ability to have control over the behavior, and introduced the extended model as PBT in 1985 (Madden, Ellen & Ajzen, 1992). Applying PBT, if an individual believes that he or she has a high level of control over the behavior coupled with positive attitudes toward the behavior, and the behavior does not conflict with an individual's perception of social norms, then there is a high likelihood that an individual will perform the behavior.

PBT might apply to consumer purchase behavior related to FT coffee purchases and assist researchers with identifying strategies for developing marketing messages that elicit strong positive consumer responses. Ajzen (2011) suggested that PBT is one of the

most prominent and referenced theories for predicting human behavior. Pedegral and Ozcaglar-Toulouse (2011) affirmed PBT as an applicable conceptual framework for FT purchase intentions. Andorfer and Liebe (2012) also acknowledged that PBT is both appropriate and applicable to consumer research pertaining to FT consumption. Coffee marketing managers with positive attitudes toward the FT label may be more likely to carry and promote FT products in their businesses. Similarly, an increase in positive consumer attitudes toward FT products might result in an increase in FT sales.

Several researchers used PBT to assist in understanding and explaining consumer behavior. Carrington, Neville, and Whitwell (2010) used PBT as a conceptual framework for examining the gap between purchase intentions and actual purchase behavior of ethically minded consumers. The researchers found that while consumers expressed intent to purchase ethical products, they failed to remember or act on the intent when in the store. Carrington et al. (2010) indicated that having marketing messages in the store that enable the consumer to remember their original belief and attitude toward acting on the ethical purchase will likely prompt consumers to act on their original intended purchase behavior. Xinming (2013) also suggested that marketers should strategically disclose firm CSR initiatives because consumers need relevant and concise information to act on intended ethical purchase behavior. Using PBT as a lens for the intention-actual purchase gap enabled researchers to identify potential strategies for closing the gap. PBT assisted the research effort of this doctoral study in a similar way.

Also using PBT, Saleki, Seyedsaleski, and Rahimi (2012) examined that influence of knowledge, quality, price, and norms on consumer attitudes toward organic purchase behavior and found PBT to be a stable indicator of consumer intent to purchase. Through study findings, the researchers confirmed that consumers in the study considered environmental sustainability and healthy food to be important concerns. Because the study took place in Iran, the researchers recommended that future research focuses on perceptions of sustainable food products in other countries (Saleki et al., 2012). The research effort of this doctoral study explored business leader perceptions and experiences related to FT coffee promotion in the United States.

Researchers can apply PBT to various contexts to explain consumer reactions to stimuli. Bondy and Talwar (2011) used PBT to understand and explain FT consumer responses to an economic recession. FT consumers in the United States, Canada, and the United Kingdom participated in a survey on attitudes and purchase behavior during a global recession (Bondy & Talwar, 2011). Participants who purchased FT products infrequently prior to the recession responded to the recession by decreasing their FT purchases during the recession, while participants who actively purchased FT products prior the recession remained loyal, without a decrease in FT purchases during the recession. While the researchers suggested that PBT was unable to account for the motives and behavior of active FT consumers during a recession (Bondy & Talwar), Ajzen and Fishbein (1975) posited that while social factors might influence consumer perceptions about a behavior, social factors do not always overpower the consumer's own

belief about the behavior. PBT still seems applicable if loyal FT consumers believe that they have a high degree of behavioral control without the influence of the recession challenging their beliefs about societal norms. Bondy and Talwar noted that further research regarding consumer motives and value of FT is necessary to assist marketers with strengthening the FT campaigns. Bondy and Talwar's statement validated the need and appropriateness for this doctoral study project as interviewing coffee marketing managers regarding their experiences related to FT coffee promotion led to information that marketers can use to increase FT coffee sales.

Despite its popularity, some researchers recently criticized PBT suggesting that it does not adequately reflect human behavior (Barua, 2013). Bondy and Talwar (2011) believed that PBT lacked the ability to explain loyal FT consumer behavior during an economic recession. Yzer (2012) posited that the PBT model is flawed because perceived behavioral control is not a strong enough indicator to directly influence an individual's behavior directly, and situational factors are more likely to influence behavior. Even facing criticisms, many researchers still consider the principles of PBT to be appropriate and applicable for research regarding attitudes toward ethical food consumption (Paul & Rana, 2012; Thøgersen & Zhou, 2012; Zhou, Thøgersen, Ruan, & Huang, 2013); this supported the decision to use PBT as a conceptual framework in this doctoral study.

### **Phenomenology**

Phenomenology is one of many research design options available in qualitative research. Considering the history behind the development of the design along with its

relevance in qualitative exploratory research might help readers to understand the appropriateness of the design for this doctoral study. German philosopher, Edmund Husserl, founded the phenomenological movement in 1913, stemming from his teacher's, Franz Brentano, philosophy that all perceptions have meaning (Converse, 2012). Husserl believed that the goal of phenomenological inquiry was to use a rigorous and unbiased approach to understand and describe the essence of human thought and experience (Converse). Ivey (2013) affirmed that a qualitative phenomenological approach is suitable for research exploring a phenomenon not easily observed or understood. A phenomenological design was appropriate for this doctoral study because each business leader has had a unique experience within the phenomenon of decision-making process related to the purchase and promotion of FT coffee, which is not easily observed.

Husserl's student, Martin Heidegger, took a different approach to phenomenology, and suggested that the goal should be to interpret, rather than describe the human experience with a phenomenon (Converse, 2012; Tuohy et al., 2013). Tufford and Newman (2012) noted that a uniqueness of Husserl's approach to phenomenology was his belief that the researcher could and should bracket personal preconceptions regarding the phenomena. Researchers also refer to the process of eliminating prejudgments as epoché (Berdychevsky & Gibson, 2015). Husserl (1931) presented two types of epoché. Universal epoché involves the researcher bracketing all current assumptions regarding the world, whereas local epoché requires that the researcher only bracket specific assumptions pertinent to the phenomenon of study (Berdychevsky &

Gibson, 2015). Moustakas (1994) suggested that the researcher bracket personal experiences with the phenomenon (local epoché) to preserve an unbiased perspective during the research process. Heidegger disagreed with this hallmark and believed that the researcher's experience and preconceptions about the phenomena aided the researcher's ability to interpret the data (Dowling & Cooney, 2012; Nimkulrat, 2012). For this doctoral study, the researcher performed local epoché, bracketing only specific assumptions relevant to the phenomenon of study, to aim for an unbiased interpretation. As Moustakas (1994) recommended, the researcher journaled both before and during interviews in order to bracket the relevant assumptions.

Phenomenology continued to progress beyond a way of conducting research to include a way to analyze the data. Hans-Georg Gadamer further contributed to the phenomenological approach by developing a way of interpreting the participant data collected (Converse, 2012). Gadamer believed that the participant's experience should be considered in terms of the existing context in conjunction with the interpreter's preconceptions to develop joint understandings (Converse, 2012; Wharne, Langdridge, & Motzkau, 2012). While this doctoral study employed bracketing in terms of data collection, the research analysis process compared data and themes to existing literature and research on the study topic in to achieve a joint understanding.

Van Kaam (1966) continued to advance phenomenology, shifting it from a philosophy to an empirical research method. Inspired by Husserl and van Kaam's developments of phenomenology, Moustakas (1994) provided a seven-step process for

coding interview data and performing data analysis. Moustakas (1994) recommended: (a) listing data and developing groupings for the data, (b) reducing the data to develop themes of the phenomenon, (c) grouping the emerging and recurring themes, (d) validating the identified themes against the interview transcripts, (e) creating textual descriptions of the themes, (f) creating structural descriptions based on these textual descriptions, and (g) creating textual-structural descriptions. In this study, participants provided responses to 1 open-ended question on their lived experience related to the promotion of coffee. With the assistance of qualitative data analytic software, this doctoral study research effort included Moustakas' seven-step process for phenomenological analysis.

Scholars can apply phenomenology to business and marketing research. Granot, Brashear, and Motta (2012) advocated that phenomenological approaches are more appropriate for exploratory business and marketing research than other more structured designs. Interpretive research methods allow for explanations of highly contextualized occurrences and provide researchers with the ability to make practical recommendations critical to business markets (Granot et al., 2012). Particular to consumer research, lived experiences are shared between the business and consumer (Wägar, Roos, Ravald, & Edvardsson, 2012), and exploring these experiences through personal interviews can assist managerial practice (Granot et al., 2012).

The phenomenological research design is not without criticisms. Irvine (2013) indicated that introspective designs face criticism as researchers utilizing these designs

are unable to address response bias consistently. Participants might provide biased responses on their lived experiences as a reaction to social desirability (Podsakoff, MacKenzie, & Podsakoff, 2012) or the researcher might contribute to bias in reporting based on incorrect judgments on what information is important (Irvine, 2013).

Additionally, phenomenological research is not purely objective and assumes that the participant is familiar with the phenomenon, which might not be the case (Kordeš, 2013). Kordeš (2013) suggested that in spite of these criticisms, in-depth first-person research is the only opportunity for deeper insight of the human experience. The human experience is a critical piece of marketing research and necessary to understand to maximize marketing efforts (Wilson, 2012). This doctoral study employed a phenomenological approach to attempt to contribute to marketing research related to human experience.

### **Phenomenology in Consumer Research**

Consumer research heavily focuses on customer perception of and experiences with products and services. Although, in recent years, marketing researchers criticized the phenomenological marketing research approach for too much individualized focus on consumers separated from the context (Askegaard & Linnet, 2011), phenomenology should not be discounted as an inappropriate method for marketing research.

Phenomenology focuses on exploring participant perception and experience to construct the meaning of phenomena (Moustakas, 1994), which can greatly assist marketers in their strategic approach.

Phenomenology is appropriate, and researchers display support of using the approach in research involving consumer experience. Wilson (2012) posited that phenomenology is appropriate for consumer research as it involves investigating, describing, and evaluating the meaning of individuals' lived experiences. Askegaard and Linnet (2011) agreed that when researchers use the phenomenological approach contextually, researchers can understand consumer consciousness and decision-making. Understanding the consumer's experience and perception of a product is essential in identifying the strategic approach to increasing sales and customer satisfaction. In this study, the phenomenological approach was appropriate for exploring consumer perceptions of and experiences with coffee purchases via business leader perceptions and experiences.

Researchers can use qualitative, phenomenological designs to understand and explain shopping behavior. Prendergast and Lam (2013) conducted a phenomenological study to understand and describe the retail shopping experiences of males and females. They noted that while researchers have conducted many quantitative studies on differences in male and female shopping experiences, that the qualitative approach enabled them to pursue a deeper line of inquiry (Prendergast & Lam). Through their research, they were able to identify several themes for the differences in male and female perception of shopping. Market managers might use these themes to develop strategies that will yield more effective consumer response.

Marketers can also use phenomenological approaches to explore consumer experiences specific to the food purchases. Tan (2013) noted that phenomenology is not synonymous with introspection or consumer opinion and that because of this distinction the design is a suitable vehicle for exploring consumer food-related experiences. Ilkay (2013) employed a phenomenological design to explore mothers' motives for purchasing healthy convenience snacks for their children. As this doctoral study pertained to the purchase of FT coffee, phenomenology appeared to be an appropriate design.

Though the aforementioned studies were in the retail industry, market researchers can use phenomenology to understand consumer behavior and cognition in response to marketing stimuli for other industries. Researchers employed a phenomenological design to investigate consumers' lived experiences related to various luxury brand and product consumption, finding that luxury items are no longer for a select few but are accessible to multiple classes (Granot, Russell, & Brashear-Alejandro, 2013). Prior to this study, most theoretical and empirical research focused on affluent consumer attitudes and perceptions, but through phenomenological study, the researchers gained a better understanding of luxury purchase phenomena (Granot et al., 2013).

Researchers have also used the phenomenological approach to explore consumer perceptions of luxury products based on country of origin. Through semistructured interviews, Jap (2013) found that Chinese consumers preferred foreign over domestic brands for luxury products. Consumers in the study perceived foreign brands to be more trustworthy and to possess higher product quality than local brands (Jap). Granting that

consumer perception of trustworthiness and quality might differ from country to country, FT coffee purchased in the United States typically is produced by foreign vendors, further validating the need to explore consumer perceptions of FT coffee in the United States.

Many consumers perceive FT coffee as a luxury item (Achabou & Dekhili, 2013), but some researchers categorize FT coffee as a commodity purchase because of how consumers perceive purchase influence. Davies, Lee, and Ahonkhai (2012) found that while consumers perceived ability to make a positive ethical influence on others through the purchase of FT coffee, consumers did not perceive that they could make a positive influence on others through highly priced ethical-luxury purchases. As indicated by these study findings, marketers need to conduct more research on consumer perception and experiences with FT coffee purchase.

### **Summary and Transition**

The existing body of literature related to consumer experiences and perceptions of FT coffee is diverse but inconclusive. The literature reviewed often indicated a strong market for FT coffee exists but without an explanation for why sales do not reflect a strong market. The information and background delivered in Section 1 provide the foundation for exploring business leader perceptions, experiences and their resultant approaches for FT coffee promotion with the intention of identifying strategies and decision making processes that increase sustainability in the FT coffee market. Six themes were revealed in the literature review: (a) the rise in popularity of CSR, (b) sustainable coffee as a socially responsible practice, (c) social responsibility is associated

with increased brand value and loyalty, (d) consumers seem to be willing to pay higher price premiums for FT and organic products, but their actual purchase behavior does not necessarily reflect this, (e) the theory of planned behavior serves as a valid method for understanding consumer purchase behavior, and (f) though it has been criticized in the past, phenomenology is an appropriate method for exploring consumer behavior and market research. The subsection included a history of both CSR and FT, along with an in-depth exploration of the existing literature related to each theme.

## Section 2: The Project

In this phenomenological study, I explored and analyzed the attitudes and perspectives of coffee marketing managers involved in the strategy development and decision-making process to purchase, distribute, or promote FT coffee. The results from the study revealed information and experiences regarding FT coffee promotion needed to understand elements associated with the purchase process. Marketers might use the study results to identify strategies to provide business owners with strategies and decision making processes to successfully market FT coffee products.

### **Purpose Statement**

The purpose of this qualitative, phenomenological study was to explore the lived experiences, perceptions, and insights of FT coffee marketing managers, to provide business owners with strategies and decision making processes to successfully market FT coffee products. The targeted population consisted of U. S. coffee marketing managers involved in the strategy development and decision-making process of purchasing, selling, or promoting FT coffee. Their information provide business owners with information that would be helpful to business owners when they are deciding what to advertise and where to advertise. The implication for positive social change includes the potential to increase market share of FT coffee, supporting third-world farmers and promoting a sustainable market for FT coffee.

### **Role of the Researcher**

In qualitative research, the researcher is the primary instrument for data collection (Chenail, 2011). I conducted the personal interviews with participants and performed the data analysis. As Moustakas (1994) recommended, it is important for the researcher to identify any personal experience with the topic to bracket this experience and to maintain objectivity during the research process. My experience with coffee began at a young age, and I continue to drink coffee daily. While not biased toward FT coffee, I recognized the importance of sustainability for the FT market because it affects not only business owners, but also third-world farmers and communities.

Researchers have a responsibility to conduct research in an ethical manner (Greaney et al., 2012). First, I completed the National Institute of Health (NIH) online training. Second, I collected and analyzed data using methods using ethical principles and guidelines for research involving human subjects contained in the Belmont Report: respect for persons, beneficence, and justice (Adams & Miles, 2013)..

### **Participants**

In this study, I used a purposive sample consisting of adults who are coffee marketing managers in the FT coffee industry in the United States. A purposive sample consists of participants who possess the ability to contribute relevant information concerning a phenomenon central to the study (Kisely & Kendall, 2011; Petty, Thompson, & Stew, 2012). Purposive sampling is appropriate for qualitative research involving personal interviews, as it increases the quality of the data when compared to

random sampling in this context (Kisely & Kendall, 2011). The type of purposive sampling I employed in this study was “criterion sampling,” which involves selecting participants based on a predetermined set of conditions (Palinkas et al., 2013).

The geographic location of the purposive sample was in the United States. I selected this location because the average FT coffee sales decreased by 36% in the United States from 2011 to 2012, while sales increased by over 20% in all other locations Fairtrade International measures (Fairtrade International, 2013). This population location was also appropriate for this study because it was not limited to academic staff or students; a majority of previously conducted studies contained academic staff or student participants, limiting the transferability beyond study contexts (Andorfer & Liebe, 2012).

To accomplish the study, I used the Fair Trade USA website to identify licensed partner organizations in the FT coffee industry. From the list of licensed partners, I located the publicly listed contact information for coffee marketing managers in the FT coffee industry involved in the decision-making process to purchase and promote FT coffee throughout the United States. I invited qualified individuals to participate in a face-to-face or Skype interview via email, and if the individual accepted the invitation and gave consent, I followed up with a phone call or email to schedule the interview with the participant. To establish a working relationship with participants, I informed each potential participant that upon the conclusion of the interview and transcription process, I would contact them to verify that the interview had captured their intended meaning.

Participants were allowed to withdraw from the study at any time without penalty, and I kept all participants' identifying information confidential, and have not included identifying information in the study reports. Interview transcripts were coded to identify common themes and assist in data interpretation. I am storing interview recordings, transcripts, and coding within a password-protected file on a password-protected cloud drive for at least 5 years. After 5 years have passed, I will destroy all records.

### **Research Method and Design**

For this study, I chose to use a qualitative, phenomenological research design. In the following subsections, I provide a description and justification for selecting this method and design. I also provide a rationale for how a qualitative, phenomenological approach is a logical derivative of the applied business problem and appropriate for studying FT coffee marketing managers' lived experiences related to identifying strategies and decision processes for FT coffee promotion and its market sustainability.

#### **Method**

For this study, I used a qualitative research method. Researchers have only recently adopted qualitative research, but it is continuing to grow in popularity and acceptance in the social science fields (Marshall & Rossman, 2011). In qualitative research, the researcher addresses one or more research questions through collected information and observations and provides a personal narrative that tells the story of the phenomenon as perceived and/or experienced by the participants (Bansal & Corley, 2012). As appropriate in qualitative research, the research effort involved conducting

face-to-face or Skype interviews, making recordings, composing transcripts, and recording observation notes to capture these personal narratives. The qualitative research method was suitable for this study because addressing the RQ does not require correlational, comparative, or experimental designs (Marshall & Rossman, 2011). Through the context of qualitative interviews, participants in this study were able to share their perceptions, perspective knowledge, and experiences with the phenomena of the strategies and decision-making processes related to FT coffee promotion as distinctly complex when compared to traditional coffee.

Although they are related, quantitative research differs from qualitative research in that quantitative research seeks to examine ordinal, interval, or scale variable relationships to determine differences, causes or predictive relationships, and infer results (Allwood, 2012). For this study, the qualitative research method was more appropriate than the quantitative method because I was not examining relationships; instead my focus was on exploring the lived experiences of the participants and how those experiences affected the participants' beliefs and practices.

### **Research Design**

For this study, I employed a phenomenological research design. Husserl (1931) described phenomenological research as a method for describing, rather than explaining the experience of the phenomenon from the perspective of the participant. Lentz (1999) noted that the emphasis on the perspectives and experiences of individuals from their personal perspectives allows for phenomenological studies to challenge preestablished

norms, informing and enhancing the researcher's understanding of the occurrence.

Wägar, Roos, Raval, and Edvardsson (2012) expanded upon this viewpoint and suggested that consumer-business relationships consist of both lived experiences that are shared with the service provider, whereas other aspects are embedded in the customer's world, inaccessible to the service provider. Through interviews with coffee marketing managers in the FT coffee industry, researchers may obtain information regarding the shared experience with the service provider.

I addressed Moustaka's (1994) guidelines for phenomenological design and performed 20 face-to-face or Skype interviews with participants who are coffee marketing managers in the United States, involved in the strategy development and decision-making process to purchase, sell, or promote FT coffee. Researchers consider in-depth interviews to be an appropriate and useful practice to gain more insight on attitudes and beliefs about FT consumption (Andorfer & Liebe, 2012). The rationale for selecting this research design was that phenomenology researchers can obtain in-depth understandings of the lived experiences of FT coffee marketing managers relating to their strategies and decision making processes for purchase and promotion of FT coffee. Marketers may use the information to provide coffee business owners with a better understanding of what to emphasize or incorporate in their marketing communications.

The process of selecting a research design involved considering other designs. Narrative research designs enable researchers to interpret the discipline through analyzing the past, present, and future accounts that consider social and cultural context (Cassell &

Symon, 2011). In this way, academicians and researchers consider sociocultural factors and stories of other participants as intertwined, leading to a better understanding of a process or perspective. Similarly, researchers employing ethnography use a range of observation techniques to gain a better understanding of people in society and how they live (Boddy, 2011). Studying participants in their natural environments allows researchers to observe the details surrounding their activities and decision-making while the experience is happening, rather than analyzing accounts of what participants say has happened (Boddy, 2011). As it is not feasible for the context of this study to observe FT coffee marketing managers in their social or cultural environment for an extended time, I chose not to use narrative and ethnographic designs.

Grounded theory provides an open approach to research, based on the concept that established theories do not fully explain the events occurring in a situation (Long, 2012). Researchers' findings often build upon or clarify existing theories, generating new theories. My primary goal for this study was to focus on human lived experience rather than testing or generating theory.

Lastly, Yin (2011) defined the case study approach as one that empirically explores or examines a current phenomenon in a real world context. Yin (2011) also noted that the case study design is most appropriate when the boundaries between the phenomenon and the context are not clearly apparent. The phenomenon in this study was confined to an individual's lived experiences and might have involved multiple contexts;

therefore, I did not select the case study method for this study. The phenomenological design best accomplished the goal for this study.

### **Population and Sampling**

In this study, I selected participants from a purposive, criterion sample of adults in the United States who were coffee marketing managers in the FT coffee industry. Researchers recognize purposive sampling as an appropriate method for participant selection in qualitative research utilizing interviews as a method of data collection (Kisely & Kendall, 2011). Elo (2014) stated that purposive sampling is most suitable for use in qualitative studies where researchers are interested in individuals who have the most useful knowledge pertaining to the research topic. Coffee marketing managers involved in the decision-making and promotion process for FT coffee have useful knowledge pertaining to factors contributing to the consumer choice process, which may enable the researcher to identify strategies for business owners to increase FT coffee sustainability.

Appropriate sample size varies by methodology; studies using qualitative approaches typically have smaller sample sizes than quantitative approaches (Nakkeeran & Zodpey, 2012). O'Reilly and Parker (2013) stated that it is not appropriate for qualitative researchers to follow quantitative procedures for selecting the number of participants in the sample because the purpose of qualitative research is to explore various representations of a phenomenon rather than to count perspectives or people. While researchers do not agree on a standard sample size for phenomenological studies,

researchers recognize that smaller samples should consist of more in-depth inquiry and should consider data saturation (Dworkin, 2012; Nakkeeran & Zodpey, 2012). Patrick et al. (2011) described data saturation as occurring when the researcher derives no new concept-relevant information from participant interviews or focus groups. Francis et al. (2010) recommended that qualitative researchers conducting interviews should begin with a minimum of 10 participants, recognizing data saturation as occurring when three or more consecutive interviews are complete, and no new themes emerge. Marshall, Cardon, Poddar, and Fontenot (2013) considered an appropriate sample size range for qualitative interview studies to be 15 to 30. I conducted 20 face-to-face or Skype interviews and employed Francis et al.'s (2010) guidelines for determining data saturation. Data saturation occurred after conducting 14 interviews, confirmed after completing 17 interviews, and I continued data collection until completing 20 interviews.

### **Ethical Research**

Researchers employ ethical procedures to protect participants and assure research quality (Oliver & Barr, 2014). Wester (2011) noted that it is important to conduct research responsibly, beginning with the research idea and the design process. Wester emphasized the importance of having an ethics committee review research proposals prior to beginning a study. Prior to inviting individuals to participate in this study, I followed the required steps to obtain approval from the Walden Institutional Review Board (IRB). The IRB approval number for this study is 05-15-15-0332296.

I required volunteers who participated in this study to read and reply to the consent form via email. Participants were able to withdraw from the study at any time without penalty, including after completing the interview. To withdraw, participants had instructions to call or e-mail me to inform me as such. If participants chose to withdraw after the interview and interview transcript were complete, then the records would be deleted and destroyed to protect the participant. While there was no formal payment offered to participants in this study, in appreciation of their time, as they desired, participants received a copy of the study findings and results as the information may be helpful to their businesses. I am keeping any information participants provided confidential. Data were and are secure; I am storing interview recordings and transcripts within a password-protected file on a password-protected cloud drive. I am keeping the data for at least 5 years as required by the university.

## **Data Collection**

### **Instruments**

In qualitative research, the researcher is an integral part of the data collection process and is the key person obtaining data from participants (Chenail, 2011; Moustakas, 1994). Qualitative researchers commonly serve as the instrument (Moustakas, 1994) and use construct study-specific, open-ended interview questions in to gain knowledge of a certain phenomenon (Chenail, 2011; Haahr, Norlyk, & Hall, 2014). In this study, I constructed my own open-ended, qualitative interview question.

In the data collection process, my role included digitally recording face-to-face or synchronous online interviews. Prior to conducting the interviews, I addressed local epoché as recommended by Moustakas (1994) to bracket specific assumptions pertinent to the phenomenon through journaling. I also directly interviewed each participant, administering the interview protocol I constructed during a period that did not exceed 1 hour. My research notes reflected participant body language and nonverbal cues to assist with the data interpretation. Following the initial interview, I scheduled walk-through interviews with each participant, in which I read select portions of the initial interview transcript and invited the participant to provide additional information and clarify intended meaning.

The interview template, a digital recorder, and computer software were the primary tools for data collection. I also took some handwritten notes in a notebook during the interview. The digital recorder and software were both on the same password-protected laptop computer.

I developed the qualitative, open-ended interview question with the intent to explore the lived experiences, perceptions, and insights of FT coffee marketing managers related to the phenomenon of developing and implementing policies and decision processes for the purchase and promotion of FT coffee; this information might provide business owners with information on best practices for FT coffee promotion and assist them in developing marketing strategies for increasing FT coffee market sustainability. Open-ended interview questions provide a medium for participants to share their specific

knowledge and lived experiences with few to no limitations associated with closed-ended questions (Chenail, 2011; Turner, 2010). As Turner (2010) recommended, I used follow-up questions to elicit participants to provide more detailed responses when necessary.

The research effort involved conducting the face-to-face or synchronous online interviews via the participants' locale of choice during times convenient for each participant.

Data collection process reliability and validity are important aspects of qualitative data trustworthiness (White, Oelke, & Friesen, 2012). Leedy and Ormrod (2013) posited that data collection reliability exists when the data collection process is consistent, established, and congruous. Member checking is an interactive method for ensuring validity in qualitative research, in which the researcher and the participant seek to assure validation and achieve consensus on the accuracy and interpretation of the interview information through reviewing the data together (Koelsch, 2013). When utilizing member checking as a form of research validation, the researcher walks through the interview transcript with the participant to provide the participant with the opportunity to extend and elaborate on the researcher's transcript's accuracy and analysis (Loh, 2013).

To increase validity, I asked participants to review the interview transcripts for accuracy with me. Participants dedicated approximately an hour for the interview and allowed for a time after the interview to review the transcript of their interviews to ensure accurate representation. After performing a transcript review and check, I also scheduled and performed member checking via walk-through interviews.

### **Data Collection Technique**

In qualitative research, data collection typically involves observation, interviews, focus groups, or written material (Kisely & Kendall, 2011). For this qualitative study, the primary technique for data collection was interviews. The face-to-face or Skype interviews took place at an agreed upon location unless scheduling conflicts presented the need for a synchronous online interview instead. Each interview began with a brief review of the purpose for the study and the participant's ability to withdraw from the study at any time without penalty. With the permission of the participant, my role as researcher included recording the interview. During the interview, I administered the semistructured interview question, providing participants with adequate time to respond to the question and elaborate on their experiences; I took handwritten notes to supplement the recording. Within 1 week after the interview, I transcribed the recording and provided the transcript to the participant to review for accuracy to assure the integrity and validity of the data (Ishak & Bakar, 2012; Koelsch, 2013). I did not conduct a pilot study.

### **Data Organization Techniques**

Organizing and storing research data securely can be a challenge but is a necessity in research to protect participant information (Xie, Liu, & Guo, 2014). Data organization techniques for this study consisted of maintaining handwritten interview notes and collected data, both raw and coded. I stored interview recordings, and transcript data within a password protected file on a password protected cloud drive while I kept the handwritten notes in a locked fireproof safe. I am keeping data for a period of at least 5

years as required by the university. After 5 years, all material will be electronically deleted or mechanically shredded. All participants can request a copy of the doctoral study upon approval by the Chief Academic Officer (CAO) at Walden University.

### **Data Analysis Technique**

After completing the data collection and organization process as described in the previous subsections, I used the guidelines provided by Moustakas (1994) to analyze the data by hand first, followed by inputting the data into qualitative analytic software.

Moustakas (1994) recommended a modified version of van Kaam's method: (a) listing data and developing groupings for the data, (b) reducing the data to develop themes of the phenomenon, (c) grouping the emerging and recurring themes, (d) validating the identified themes against the interview transcripts, (e) creating textual descriptions of the themes, (f) creating structural descriptions based on these textual descriptions, and (g) creating textual-structural descriptions from steps (f) and (g). Qualitative data analysis enables the researcher to identify and evaluate the significance of the data (Evans, 2014) to answer the research questions. Before beginning data analysis, I reviewed each interview question, the interview transcriptions and notes, and the research questions.

### **Interview Question**

The interview question for this study reads as follows: "Picture and walk through a recent FT coffee marketing strategy and decision-making development process. Please be as thorough and comprehensive when describing your experience."

Data analysis for this study logically and sequentially addressed the research question through the data analysis. The focus for this qualitative, phenomenological study was to explore the insights, perceptions and lived experiences of FT coffee marketing managers regarding the purchase and promotion of FT coffee. Through this exploration, I was able to identify strategies and decision making processes to market FT coffee products. I used the interview question as a guide for the research and to guide the analysis of the participants' responses.

### **Data Analysis Software**

I used qualitative data analysis software to assist me in coding the data and deriving themes from the interview transcript narratives. Using qualitative data analysis software is beneficial in qualitative research (Bergin, 2011) and enables the researcher to increase the level of rigor in data analysis procedures (Kikooma, 2010). Qualitative data analysis software enables the researcher to manage larger quantities of narrative data, provides flexibility during the coding process, and increased validity and accuracy in analysis (Leech & Onwuegbuzie, 2011). After constructing written transcriptions of the recorded interviews, I uploaded the narrative text into the qualitative data analysis software program, NVivo 10, for coding following an initial hand analysis using Moustakas' (1994) prescribed steps.

### **Data Coding and Data Analysis Consistency**

Large quantities of narrative data are a part of qualitative, phenomenological research, and reducing these data is important in the analysis process (Searle &

Hanrahan, 2011). Researchers accomplish data reduction through data coding, the process of grouping the data to identify categories, ideas, and themes (Wainwright & Russell, 2010). Moustakas (1994) recommended data reduction as the first step for phenomenological theme development. I gave particular attention to phrases that reoccur across various participant narratives. It is important for researchers to recognize that recurring phrases might fall into more than one code category (Wainwright & Russell, 2010). I used these significant phrases to identify themes, organize the themes into clusters, and refer to the original statement to ensure the accuracy (Searle & Hanrahan, 2011). I provided a description of the phenomenon as suggested by Moustakas (1994) and utilized participant member checking to compare the themes with their experiences (Searle & Hanrahan, 2011). I employed member checking to ensure data analysis was consistent with the research questions in addition to providing participants with an opportunity to expand or elaborate on the captured data.

### **Conceptual Framework**

I anticipated that the themes and ideas derived from this study will concur with planned behavior theory concepts related to the leader decision-making process. Ajzen (1991) suggested that an individual's attitudes about a behavior, subjective norms, and perception of behavior control allow a researcher to predict an individual's intentions. Exploring the experiences, perceptions, and insights of coffee marketing managers related to the policy development and decision-making process to (or not to) purchase or promote FT coffee might further the understanding of planned behavior theory

introduced by Ajzen (1991). As common themes are identified and developed, business owners might gain a better understanding of the best practices and decision making strategies in FT coffee promotion and the ability to predict the consumer's intent to purchase (or not purchase). Business owners may use these best practices and decision making strategies to increase sustainability in the FT coffee market. My role involved comparing the results from the data analysis with the research literature related to planned behavior theory to determine if the results were similar, different, or similar but inconsistent with the conceptual framework.

### **Reliability and Validity**

Evaluation and standards of research quality are important in both qualitative and quantitative research. Several varied positions exist surrounding the concern over research quality in qualitative research (Ali & Yusof, 2011). Researchers agree, however, that they can evaluate qualitative research rigor in terms of reliability and validity though measures might differ from quantitative procedures (Leedy & Ormrod, 2013; Thomas & Magilvy, 2011). In qualitative research, a study's reliability is the degree to which future researchers can achieve uniformity of results when following the same methods and procedures (Venkatesh, Brown, & Bala, 2013). Researchers achieve reliability in qualitative studies through member checking and interrater methods (Morse et al., 2011).

Two types of validity within social science research are internal validity and external validity (Abowitz & Toole, 2010). Researchers determine validity in qualitative studies through internal and external verification, the ability to replicate the study, and

logic (Morse et al., 2011). Internal validity refers to the ability of researchers to establish a causal relationship between variables in quantitative studies (Abowitz & Toole, 2010). Researchers describe external validity in quantitative studies as the generalizability or transferability of study findings to a larger context (Abowitz & Toole, 2010; Ali & Yusof, 2011). For qualitative studies, researchers consider *credibility* to be the equivalent to internal validity in quantitative studies (Thomas & Magilvy, 2011). Because this study was qualitative, I assured the study's credibility, dependability, and transferability to establish reliability and validity.

### **Reliability**

For qualitative research, the goal is to minimize error and researcher bias to maximize data trustworthiness (Leedy & Omrod, 2013). To demonstrate reliability in this study, future researchers with a similar background, utilizing the same resources and research questions would be able to repeat the study and develop similar conclusions (Abowitz & Toole, 2010; Venkatesh, Brown, & Bala, 2013). In qualitative studies, researchers consider dependability to be the equivalent to reliability in quantitative studies (Thomas & Magilvy, 2011).

The credibility of the interview questions affects the data reliability; increasing the consistency of the interview questions can strengthen the reliability of the results (Dibley, 2011; Turner, 2010). Thomas and Magilvy (2011) noted that a researcher can establish dependability in research through providing an *audit trail* that includes specifically describing the (a) purpose of the study, (b) participant selection criteria, (c)

data collection and analysis procedures and timeframes, (d) details surrounding data reduction, (e) interpretation and presentation of research findings, and (f) indicating specific techniques to establish data credibility. Throughout this study, I provided a detailed description of the purpose of the study, participant selection criteria, and the interview question for this study so that others may follow similar procedures. For this study, I also provided detailed information regarding the research data collection and analysis process, such that another researcher should be able to replicate the study and develop similar conclusions.

### **Validity**

Researchers use validity to ascertain the credibility of the data collection, analysis, and findings, and the degree to which research conclusions are an accurate representation of the studied phenomena (Frost et al., 2011). Internal validity and external validity are two constructs for establishing credibility in quantitative research (Ali & Yusof, 2011). Though internal validity measures typically apply to quantitative research and are not typically used in qualitative studies, methods for ensuring internal validity might contribute to qualitative studies (Leedy & Ormrod, 2013). In qualitative research, researchers use credibility and transferability as counterparts to internal and external validity (Thomas & Magilvy, 2011).

The research effort in this study included following researcher recommendations for increasing credibility through checking code definitions multiple times throughout the analysis process (Denzin & Lincoln, 2011) and repeating analysis until themes are clearly

recognizable (Markova, Perry, & Farmer, 2011). In this study, my role as the researcher included developing the semistructured interview question, giving careful consideration to the research questions and common themes in the literature to maximize credibility. To further increase the credibility, I performed member checking and data triangulation in addition to assessing and disclosing researcher bias and presented any conflicting data.

Member checking is an interactive method for ensuring validity in qualitative research in which participants are invited to confirm that interview transcriptions accurately reflect their experiences and perceptions (Koelsch, 2013; Mero-Jaffe, 2011) and provide participants with the ability to expand or elaborate on the data (Loh, 2013). I invited participants in this study to perform member checks, and I made any necessary revisions according to participant feedback. Data triangulation is a validation technique (Ali & Yusof, 2011) appropriate for phenomenological research (Moustakas, 1994), in which researchers compare multiple forms of data. Oleinik (2011) recommended comparing recorded interview transcripts with handwritten interview notes to measure the consistency of the recorded verbal and nonverbal responses, which I did in this study. To minimize researcher bias in the data analysis, I reviewed the interview question and derivative interview questions, the interview transcriptions and notes, and the research questions.

For qualitative research, researchers consider transferability to be the equivalent of external validity in quantitative studies (Thomas & Magilvy, 2011). Researchers define transferability as the ability to transfer research findings from one study to the

next, or the extent to which findings are applicable in other settings (Thomas & Magilvy). Erlingsson and Brysiewicz (2013) suggested that detailed descriptions of the phenomenon and study domain and participants are necessary to provide other researchers with sufficient information to judge study finding applicability to other contexts. For this study, I have provided a detailed discussion and literature review of the study phenomenon, and I provide detailed information on this study's domain and participants, to provide other researchers with sufficient information to make informed decisions on the findings' conclusions', and recommendations' transferability to other domains.

### **Summary and Transition**

In this qualitative, phenomenological study, I explored the lived experiences of FT coffee marketing managers in the United States who have experienced the phenomenon of developing strategies and decision processes for the FT coffee purchase and promotion, I collected responses to the interview question, transcribed the interview data, uploaded the data to the qualitative analytic software program, NVivo 10, and identified themes. Section 2 contained detailed information on how I implemented the data collection, data analysis, and conceptual framework to explore marketing managers' perceptions and insights regarding strategies and decision processes for FT coffee purchase and promotion. I categorized participants' responses into themes to identify what strategies marketing managers are implementing, and can implement to market FT coffee products. Section 3 contains more detail on these themes and potential strategies.

### Section 3: Application to Professional Practice and Implications for Change

#### **Introduction**

The purpose of this phenomenological study was to explore the lived experiences, perceptions, and insights of 20 FT coffee marketing managers involved in developing strategies and decision-making processes related to the promotion of FT coffee in order to enable business owners to successfully market FT coffee products. This exploration led to the identification of significant factors in the strategic development and execution of FT coffee marketing promotion. My role included digitally recording, transcribing, validating, and analyzing all interviews following Moustakas' (1994) modified van Kaam approach. The research question for this study was: What information do coffee marketing managers need to design and implement strategies regarding the decision-making processes for the promotion/marketing of FT coffee?

Moustakas' (1994) modified van Kaam method for analysis was appropriate for this research study; it enabled me to explore the lived experiences of participants related to the study phenomenon and to the group and reduce the findings into themes. The interviews yielded substantive responses regarding factors involved in the strategy decision-making and development process for marketing FT coffee. These themes are expected to provide business owners with the knowledge and practical methods to successfully market FT coffee products.

## Overview

The purpose of this phenomenological study was to explore how business owners might determine strategies and decision-making processes to successfully market FT coffee products. The research involved exploring the perceptions and lived experiences of 20 FT coffee marketing managers regarding their decision-making processes to market FT coffee products. The following research question served as a guide in this study: What information do coffee marketing managers need to design and implement strategies regarding the decision-making processes for the promotion/marketing of FT coffee?

This study included semistructured interviews, in which 20 FT coffee marketing managers provided responses to an open-ended interview with a single question. During the face-to-face or Skype interviews, I requested that each participant to respond to the same question. As this study was exploratory in nature, I encouraged participants to be as comprehensive as possible when describing their experiences. Through these in-depth interviews, participants provided a detailed description of their lived experiences regarding FT coffee marketing strategy and decision-making development process.

Implementing the study design enabled me to explore the lived experiences of marketing managers in the FT coffee industry. Because phenomenology focuses on exploring experiences as described by the participant (Moustakas, 1994), it was an appropriate design for this study. Thus, phenomenology provided a structured approach to capture and analyze participants' lived experiences with the phenomenon.

After checking each interview transcript with the corresponding participant for accuracy and intended meaning, I uploaded each interview transcript into QSR International NVivo 10 software for coding and theme analysis. To protect confidentiality, I assigned each participant a code, P1 through P20. Moustakas (1994) recommended a modified version of van Kaam's method for analysis. I used this modified van Kaam method to collect, group, reduce, and validate the study data in order to create structural and textual descriptions of the emergent themes. Following this process, I sorted recurring themes into nodes, grouping references to each node from each source (participant). Identification and analysis of the recurring themes in the form of nodes provided a deeper understanding of the phenomenon as experienced by the participants. The emergent themes in the study included the following: (a) consumer knowledge, (b) consumer education, (c) price, (d) coffee quality, (e) synergy of FT and organic attributes, (f) direct relationships with farms, (g) customer connection to farmer and change, (h) method of marketing message to customer, and (i) marketing manager's belief in FT principles.

### **Presentation of the Findings**

The intent of this qualitative, phenomenological research study was to answer the central research question: What information do coffee marketing managers need to design and implement strategies regarding the decision-making processes for the promotion/marketing of FT coffee? To answer this question, I developed a semistructured interview question that prompted participants to share their lived experiences related to a

FT coffee marketing strategy and decision-making development process. The findings from this study provided an understanding of factors in FT coffee marketing strategy development. This study included interviewing 20 marketing managers in the United States involved in the decision-making process related to the purchase and promotion of FT coffee. The interviews were semistructured and provided a format for participants to share their experiences related to FT coffee marketing strategy and decision-making development processes. Each of the 20 participants consented to participate in the research study through responding to a consent form via email. Participant responses to the open-ended interview question served as the data in this study. My role as the researcher included conducting, recording, and transcribing the interviews and verifying findings through transcript and member checking.

After I transcribed the interview content verbatim and prepared the data for analysis, I followed Moustakas' (1994) modified van Kaam method for an initial analysis by hand. Next, I uploaded the narrative text into the qualitative data analysis software program, NVivo 10 for coding using the modified van Kaam method for analysis. Moustakas' (1994) modified version of van Kaam's method involves grouping, reducing, and confirming data into themes.

For data triangulation, I followed Oleinik's (2011) recommendation and compared recorded interview transcripts with handwritten interview notes to measure the consistency of the recorded verbal and nonverbal responses. I also performed member checking, providing the participants with a summary of my interpretation of their

experiences and requested them to provide feedback to ensure the accuracy of interpretation. The results of this study addressed the research question and factors in the strategic development and execution of FT coffee marketing promotion processes.

### **Emergent Themes**

The themes emerging from the interview process were as follows:

1. Consumer knowledge
2. Consumer education
3. Price
4. Coffee quality
5. Synergy of FT and organic attributes
6. Direct relationships with farms
7. Customer connection to farmer and visible change
8. Method of marketing message to customer
9. Marketing manager belief in FT principles

The emergent themes from the study are factors involved in the strategy and decision-making development process experience. Participants in the study discussed their experiences regarding various approaches to marketing FT coffee. The themes presented in the findings provide business owners and marketing professionals with strategies and decision making processes to successfully market FT coffee products.

**Theme 1: Consumer knowledge.** Consistent with Darian et al.'s (2015) findings, consumer knowledge, and understanding of the FT attribute emerged as a significant

factor for marketing strategy. Consumers possess various levels of knowledge of FT principles that coincide with the attribute, and the marketing strategy employed depends on the consumer's existing knowledge (Darian et al., 2015). As Murphy and Jenner-Leuthart (2011) posited, customers who are more knowledgeable about the meaning and principles behind the FT label are more likely to desire FT coffee as an offering in their local coffee shop or café. Participants in this doctoral study indicated that consumer knowledge of FT and its implications for coffee varies and affects the way that they approach marketing FT coffee.

Of the interviews in this study, 15 of the participants (75%) indicated consumer knowledge as a factor in the decision-making process for how to market FT coffee. Participants in the study reported different levels of consumer knowledge for their target market demographic. Of the 15 participants citing consumer knowledge as a factor, 6 (40%) indicated that their customers were well aware of FT principles and impact, while 9 participants (60%) indicated that consumers do not fully understand FT to the extent that they desired. Lack of consumer knowledge on the FT implications for coffee could be because the fair trade-organic (FTO) market has entered a passive consumption era (Doherty, Davies, & Tranchell, 2013). Rather than actively and deliberately pursuing and selecting products based on their FT attribute, consumer purchases of FT products are habitual (Doherty et al., 2013).

All participants agreed that they could benefit from increased consumer knowledge in the FT coffee industry. These findings align with Andorfer and Liebe's

(2012) conclusion that, as consumer awareness of FT efforts increases, positive consumer attitudes toward FT are likely to increase. A sample of supportive statements for the consumer knowledge theme in this study is as follows:

“I would say a large part of their consumers are aware of it and know of it” (P11).

“I don't know if people know exactly what fair trade is, but they know that it's good and so they want to help support it even if they don't know exactly what it is, like what that certification is” (P14).

I guess they know a little bit about it - they know that it helps people, for the most part, but they really don't know much, they know it helps people, but they really want to know how it helps people and in what forms is it helping people. (P16)

I think - I think at this point, um, fair trade is and that certification is pretty well-known in the market, especially for the types of customers we're working with. So it doesn't take a lot of explaining on our part, which is nice. (P5)

I would say less than a percent of people in that instance when they are buying a cup of coffee actually ask about a certification. I would say that like one in a thousand customers even, asks about a certification when they are just buying a cup of coffee in our store. (P14)

I think it's pretty polarized. I think that a lot of the specialty coffee consumers have no idea about the fair trade deal, they are just more worried about the coffee quality and then there's the consumers that are very educated - hyper-educated and they are really into the certification and have to have the certification - there's

definitely two ends of the spectrum, not much middle ground at least that's what we see. (P9)

The level of knowledge and awareness a customer has about product's connection to social responsibility impacts consumer perception of the product (Dincer & Dincer, 2012). If marketers are able to increase consumer awareness of ethical standards associated with the FT coffee label, then there is an increased likelihood that consumers will perceive the product as positive and make a purchase (Yang, Hu, Mupandawana, & Yiu, 2012). Fifteen participants spoke about the level of existing consumer knowledge as a factor in how they approached promoting FT coffee.

While reported consumer knowledge varied among the participants, 4 participants (20%) mentioned that younger consumers seemed to be more knowledgeable about FT than older consumers. Participants in this study did not discuss why younger consumers seem to be more knowledgeable about FT. This finding could be related to younger generations being more receptive to CSR initiatives when making purchase decisions (Jin, Littrell, & Niehm, 2012). A sample of participant statements regarding comparing consumer knowledge between older and younger consumers is as follows:

We have much better success with it on campus locations. They are more interested in it, but even at the colleges, our high watermark in sales is approximately 11% of our coffee sales being the fair trade and organic variety. (P12)

I think it's trending, but people are becoming more - there's probably a market - the millennial sector probably has a better understanding than older consumers, so I think - I don't think everyone really gets it - what that fair trade - but it is kind of self-enunciating. The words kind of explain itself. I think if people don't have a real grasp of what that certification means, or what it costs, or what the impact is in the community, it feels - they get the feeling of what that - they may not know what it means, but you get the download. (P19)

“I think in general, you know, younger people are a little bit more attuned to it, than you know older people” (P3).

Researchers should consider millennials as a collection of markets, rather than a unified, homogenous market, because within the millennial group cause-related purchase intent and behaviors vary (Bucic, Harris, & Arli, 2012). Participants in the study noted similar trends among younger consumers being more knowledgeable than older consumers. While younger consumers may appear more knowledgeable about FT than older consumers, marketing managers and business owners may benefit if they consider the differences that may exist in the submarkets within the younger consumer population.

**Theme 2: Consumer education.** Related to the consumer knowledge theme, educating consumers on FT and sustainability practices emerged as the second major theme. When consumers are educated on the differences between food products possessing a certification label, they are more likely to prefer the label (Gifford & Bernard, 2011). Of the 20 interviews in the study, 18 participants (90%) indicated that

they engage in educating the consumer at some level. Most participants referred to educating the consumer as an activity that they enjoy. Consumer education is important as it is directly related to increasing the demand for socially responsible, quality coffee (Bacon, 2013). A sample of supportive participants' statements for the consumer education theme in this study is as follows:

But we also think it's an education process because a lot of people do not know, as far as the consumer goes. So we tried to educate ourselves on fair trade kind of how it works, how that money kinda flows back to the communities that um, you know where the coffee is produced. (P3)

"I'd say that in our area people are undereducated about fair trade" (P14).

The company is going through a redesign on all their packaging, and I think the goal is to make it more competent, but we have not seen the artwork that they're coming up with. But we think that's the goal. (P7)

We definitely love to have those conversations and educate customer base, for the first time or for the fifteenth time as they come in and ask about our new coffees, new farms or what we are working with or where we just traveled. (P20)

For us it is constantly educating those people who are new to third wave coffee, if you will, so yeah. I would just say that for us, that's a big part of what we do is just educating people constantly as to why it's a higher value product. (P11)

Consistent with Creel's (2012) work, participants in this study indicated that customers' responses were mostly positive toward FT and the brand after learning about

the features and benefits of the FT label. Consumers that are knowledgeable about the features and benefits of the product attribute are often willing to pay higher prices for the product than consumers who possess little knowledge (Diaz, Pleite, Paz, & Garcia, 2012). Participants in the study indicated that while not all consumers were willing to pay more for FT coffee than a noncertified coffee, their customers are generally favorable to the label and its implications after engaging in educational conversations.

**Theme 3: Price.** Understanding consumer willingness to pay (WTP) is an important function for determining appropriate pricing for sustainability and profitability. While FT consumers are not typically as price sensitive as other consumers (van Herpen, Nierop, & Sloot, 2012), participants in this study reported that many of their customers ask or acknowledge FT coffee as being more expensive than traditional coffee. Of the 20 interviews, 16 participants (80%) discussed price as a consideration in their marketing and decision-making practices. Price included two subthemes: consumer sensitivity to price and price being in range with other specialty (non-FT) coffee.

**Consumer price sensitivity.** In this study, 10 of the participants (50%) mentioned that their consumers were sensitive to the increased price associated with the FT premium for coffee. While organic customers often perceive price as a quality indicator (Ngobo, 2011), FT customers do not (van Herpen, Nierop, & Sloot, 2012). Contrary to van Herpen et al.'s (2012) findings, but similar to Sörqvist et al.'s (2013) results, some participants in this study indicated that their customers perceived the FT price premium to be associated with higher quality coffee. Participants in the study reported that even

when consumers perceived FT coffee as higher quality, consumers were not always WTP more for it. A sample of supportive statements for the consumer sensitivity to price subtheme in this study are as follows:

“You know they are concerned about price too, so um we don’t price our fair trade coffees higher than our non-fair trade coffees, so um that’s what we do so they like the explanation they try to understand it” (P1).

What we have found is both of the organic side of things and the fair trade side of things - people are much more likely to say that they are in favor of that sort of thing, when they are just asked about it, but when it comes to pulling money out of their pockets to buy it, they don't move nearly as far as they seem to say they would. (P12)

Again given the option, I think most people are very happy to support that - most consumers are happy to support that. Not everyone seems willing to pay more for it, um, which is why we don't charge more for it at the retail level than uncertified coffees. (P13)

Because at some point, you know people get priced-out, you really start to shrink, just like there's only a certain number of people who absolutely demand it, there's also a large number of people who don't want to pay it and pay extra for it and in some cases a lot extra for it, so you know it's being able to convince people that it's worth the extra money that's the tough part. (P2)

The question around "Am I willing to pay more for it? Because of the farmer, because of sustainability, because I wanna make sure that wages are fair..." I don't know that there's a lot of data that suggests that a consumer is willing to spend more for that, I do think that there is data that suggests that they are willing to spend more for organic, so the linkage to fair trade-organic is a good - is a good linkage. (P6)

Certified products such as those under the FT or organic labels frequently have higher price premiums than noncertified products, which was the case for FT coffee for the participants in this study. While all participants acknowledged that the price they pay for FT coffee (at the roaster level) is higher than noncertified or traditional coffee, not all participants' customers incur the price premium. Although Diaz, Pleite, Paz, and Garcia (2012) found a correlation between consumer knowledge and WTP premium prices, participants in this study indicated that increased consumer knowledge did not always result in WTP more for FT coffee.

*Price in range with specialty coffee.* Of the 20 interviews in this study, 12 participants (60%) indicated that the prices they use for their FT coffee is in range with specialty-grade coffee. Several participants mentioned that they do not price their FT coffees higher than their uncertified coffees; the FT premium costs are absorbed at the roaster level and are not passed to the customer, resulting in smaller margins for the roaster. These findings also concur with van Herpen et al.'s (2012) findings that as the price premium for FT increases, the market share decreases. A sample of supportive

statements for the price in range with specialty coffee subtheme in this study are as follows:

It is a flat pricing structure for us and almost all of our coffees are fair trade certified - not all of them, but almost all of them are fair trade certified, all of them are certified organic, and on that level they are flat across and for our wholesale level, our prices are pretty much the same as everybody else's wholesale prices whether they are conventional, whether they are certified or not. So really in our market here, I don't think you have to pay extra for fair trade certified coffee versus non-fair trade at the grocery store level. (P13)

“Our entire line up is fair trade. So, but - you know now, those other guys, even though their coffee's not FTO, they're pricing themselves there at that same level” (P17).

I mean sometimes, I mean there's people who are like "Wow that's expensive!" But we sell full pounds of coffee for the most part, and we are competitive with you know if they went into the grocery store and bought some of the higher end stuff, you know more expensive stuff. (P2)

There's such a variance in coffee prices that a lot of times, like a lot of times our fair trade organics are not as expensive as some of our non-certified coffees, you know - there's different quality levels and different availabilities from different countries. (P5)

Participants that reported using a flat pricing structure (where they absorbed the premium price for the FT certification) indicated that their customers were inclined to

purchase the FT coffee when it was price neutral. Some participants reported that after customers learned about the FT system, they were willing to pay the premium and chose to purchase FT rather than traditional coffee. While many consumers are willing to pay higher prices for products or services that promote socially responsible practices (Khan & Manwani, 2013), inconsistencies still exist between consumer expressed purchase intent and WTP (Tung, et al., 2012).

**Theme 4: Coffee quality.** Of the 20 interviews, 8 participants (40%) mentioned coffee quality to be a contributing factor in the FT coffee marketing and decision-making process. Movement toward mass production and harvesting practices have negatively impacted coffee quality (Läderach et al, 2011) and consumers are demanding higher quality (Bacon, 2013; Elder, Lister, & Dauvergne, 2014). Participants in this study also suggested that coffee quality is an important variable in being able to market and sell FT coffee. Most participants who cited quality as a factor indicated that quality should serve as a prerequisite to the FT attribute; FT coffee that does not meet quality standards will not sell well. A sample of participants' supportive statements for the coffee quality theme in this study is:

I think we have to make it about quality first and get people to buy it, because then they can feel good about themselves by buying it, it needs to be about the quality and people need to have a good reason to buy it and for me that's what it's going to come down to. (P12)

“It's gonna have to perform like really well, if I've got a better tasting coffee at a lower price, they're going to be more inclined to do that” (P15).

I think more often, people are coming to us for a level of quality. So the organic and fair trade certifications are evidence of that, from time to time we do have clients who specifically say I want to buy organic coffee or fair trade coffee. (P5)

I should have said that the quality is really is where the price meets the different requirements. So quality is in the eyes of the beholder. I do think overall, just to reiterate, these certifications are going to slowly increase the overall quality as far as cup goes in the industry. But, like I said, you still do have larger roasters interested in traceability. Even in lower grade as far as cup quality goes, there still are fair trade certified coffees. (P10)

As Sörqvist (2013) posited, several participants in the study reported that their consumers perceive sustainably produced coffee to be of a higher quality than noncertified coffee. Certifications are not always indicative of quality, and while moral motives may be more important than economic factors in a consumer's decision to purchase FT products (Sunderer & Rössel, 2012), product quality must be present. Product taste is one of the top influencing factors affecting consumer food purchases (International Food Information Council Foundation, 2011; Rizkallah, 2012). Participants indicated that purchasing quality coffee is an important function for effective processing and resale.

**Theme 5: Synergy of FT and organic attributes.** A large percentage (95%) of participants mentioned pairing FT and organic attributes together. Many participants possessed the organic certification in addition to the FT certification, and indicated that the attributes work well together for marketability. Several participants indicated that while they sold FTO certified coffee, combining both attributes was not intentional, but a result of availability from their importer (most of the FT coffee was also organic). Even the participants that did not intentionally pair FT and organic attributes for their coffee products indicated that they thought that the two certifications possess a positive synergy. While recent literature highlights differences between FT and organic product consumers (Loose & Remaud, 2013; Ngobo, 2011; van Herpen et al., 2012), the findings in this study indicate marketers may achieve greater success through pairing the attributes together. A sample of supportive statements for the synergy of FT and organic attributes theme in this study is:

“I do think that there is data that suggests that they are willing to spend more for organic, so the linkage to fair trade-organic is a good - is a good linkage” (P6).

We felt like in order to capture the relatively small percentage of folks who cared about organic and fair trade, we needed to develop some critical mass of an audience and so we said, well we'll find people who will care about organic, we'll find people who will care about fair trade, they won't all be the same people, but at least if we find two separate customer groups that are willing to step up and buy a little bit better coffee - more socially responsible coffee - then we'll have a

bigger market to sell into. So we decided that everything organic was going to be fair trade and everything fair trade was going to be organic. (P18)

I think it comes down to the consumer - a lot of the consumers that are looking for one also want the other, and both are becoming equally important. One for the organic - it for the self, their own health, the pesticides and all the other things that come along with conventional farming, for them when they see organic, it's good for them and for a lot of people, it goes hand in hand. When they see that fair trade sticker, they can feel good all around, not only their own health is improved, but also the health and lives of the farmer that they can come full circle, which is why I think they go hand in hand. (P11)

I think it's more on the organic side than the fair trade, but I think people that gravitate toward the organics, they like the fact that they can get it with fair trade as well, so you know, to marry those two up was such a good thing for us. (P4)

I think it's also becoming more common to have both the fair trade and organic certification together. Sort of - not that certifications compete, but the fair trade organic certifications are trying to make sure that they are covering - being more sustainable. (P9)

Many consumers consider environmental sustainability and healthy food to be important concerns (Saleki et al., 2012). In this study, a few participants mentioned that being both a certified FT and organic roaster provided them with access to customers that they would not otherwise reach. Participants also indicated that while pairing the

attributes together increases the price, consumers seem to be WTP more when the coffee has both attributes. These findings also align with Loose and Remaud's (2013) discovery that that WTP for organic products was more than twice as high as consumer WTP for environmentally responsible products.

**Theme 6: Direct relationships with farms.** Approximately 90% of participants in this study discussed direct relationships with farms as being important to their marketing approach of FT coffee. Participants emphasized the benefit of having a relationship with a farm or collection of farms (cooperative) when developing marketing messages and promotional materials. Cocreating CSR strategies with stakeholders promotes lasting identification-based relationships with the firm (Hildebrand, Sen, & Bhattacharya, 2011). The theme of direct relationships with farms consists of the subthemes direct trade (DT), trip to origin, and relationships with FT farms.

*Direct trade.* Of the 18 participants who mentioned direct relationships with farms or DT, 8 participants (44%) engage in DT. Similar to researcher perceptions (London, 2012; Raynolds, 2014), participants expressed varying perspectives of DT. Some participants expressed skepticism of DT transactions because of the lack of third party oversight and traceability. Eight participants indicated that they engage in DT and generally perceive it as positive, because DT provides the roaster with more control and opportunity to obtain coffee from farms practicing FT principles that cannot afford the certification costs. DT is an option for smaller coffee farmers who cannot afford the costs associated with becoming FT certified (Tellman, Gray, & Bacon, 2011).

Participants also mentioned that even with the increased control, they assume more risk in a DT transaction than in a FT transaction. Because DT is a private, uncertified activity it can be difficult for smaller businesses to manage (London, 2012; Tellman, Gray, & Bacon, 2011). Several participants mentioned the drawbacks of not having a third party certifier to enforce practices and support communities. A sample of supportive statements for the DT subtheme in this study is:

Some of the coffee that we've been getting in a direct trade way without using our larger importer, it's again the same thing where they are working toward the fair trade certification - maybe they can't afford it right now or this year, but they are working towards that. (P11)

So your direct farm to cup smaller companies, I tend to feel like are your most ethical, once again, I'm trying not to say any companies, but there's one I feel like you can trust more. My logic may be completely wrong, and I'm not just saying that because we're a small coffee company, but anyways, that's kind of what I feel with the whole fair trade certification deal. (P16)

So for now, we're certified through Fair Trade USA, however, I think direct trade is probably our end game. It's much fairer to all the people involved if you can get in relationship with the farmers. We've been buying from the same plantations for 15 years, but always through a broker, so I like the kind of global enforcement that the Fair Trade USA offers and as we get stronger and bigger, I want to start doing our own direct trade. (P19)

We tend to go direct trade as much as we can, so when your interacting with the farmer and you can ask, you yourself can ask him, "Oh okay so what do you do for your workers? What do you pay them?" (P2)

Well, just an observation that the direct trade model has begun to compete much more than a few short years ago. The direct trade model almost always carries a higher price point still, but I think that direct trade model seems to be the price leader as far as the consumer is concerned, and fair trade is, therefore, easier to buy than - once you tell a fair trade story, it's easier for the consumer to buy because the price point is better. (P18)

With the direct trade, so for most of us that are microroasters, we don't have time to travel to origin, so I think the world has shrunk considerably in terms of shifting and things with shipping and how we get around, so that has created a venue for roasters to order some coffee directly from a cooperative. (P8)

All participants who were in support of DT were pursuing DT as a supplement to FT, rather than as a replacement. Aligning with London's (2012) work, some participants mentioned that they engage in DT because they believe that they are able to pay farmers more in DT relationship than under the FT label. In this study, participants recognized DT as being a buzzword with consumers, effective for marketing material.

***Trip to the origin.*** Many participants talked about traveling to the origin of the FT coffee farmer, and the role that a trip to origin played in marketing activities. Of the 20 interviews in this study, 8 participants (40%) indicated that their firm had done a trip to

an origin that provided pictures, stories, and experiences that could be shared with their customers via marketing materials. Participants who traveled to origin affirmed that the trip was not only instrumental in being able to obtain materials for marketing, but also in their personal lives. Seeing the direct impact of FT premiums being invested in farming communities affected participants' personal views of the FT label and initiatives. A sample of supportive statements for the trip to origin subtheme in this study is:

And traveling to origin to us is important and a physical...for us to be able to continue to have you know - be able to say we've been there and we've seen it helping, we've seen the good that it's doing, the improvements that are getting made, so for us that's a really important part and kind of goes hand in hand with that - to be able to offer that to our customers, not just taking an importer's word for it, but be able to say, we've seen it first hand and know how important it is.

(P11)

There is no debate when you travel to and see the impact of fair trade in the coffee regions that I've been fortunate enough to travel to and meet with individuals that have had felt the direct impact of fair trade pricing. (P17)

We pride ourselves on the community and family aspect of the company, what we're driven by from our consumer to the farmers that we work with. We fly directly down - I just got back from Colombia actually - meeting the farmers, seeing the farm, seeing what they're doing, practices - how they're treating their employees, how they're processing the coffee, tasting the coffee, looking for the

quality from some organic farms that we are purchasing from and finding new coffees as well. (P20)

“Okay, so recently we had a retail partner have an interest in learning more about fair trade and so the journey to the creation of the marketing plan actually started with a trip to origin” (P6).

In reflection of the participants’ accounts, a trip to origin may be costly, but it is a good investment for marketers desiring to better promote FT impact to their customers. Marketers who travel to origin may obtain more detailed information about coffee production and growing processes that enable them to better articulate FT distinctions to consumers. Trips to origin may also provide business owners with the opportunity to form relationships and gain information necessary to optimize alignment of CSR strategy and promote FT coffee products.

***Relationship with a farm.*** Seventy five percent of participants in this study reported that they had a relationship with a farm. It is important for marketers to be able to measure the CSR influence on social activities (Pergelova & Angulo-Ruiz, 2013). Furthermore, it is important to align CSR initiatives with business and stakeholder values (Popoli, 2012). One way in which participants expressed achieving alignment of CSR influence (via FT) was through establishing and maintaining relationships with FT farms. A sample of supportive statements for the relationship with a farm subtheme in this study is:

Us going and them seeing me and my roaster in the field with the farmer and sipping the coffee after we roast it and that coffee being in the cup at the store, that they can see, it is a much easier thing to follow perhaps. So - but it still involves a measure of education, it's not just telling people "We go out in engage in direct trade or relationship coffee" which I think it a more accurate term.

Developing relationships with farmers so that year after year with cooperatives we can go back to the guys, we know they are going to sell it, they know we will buy it, we know the quality and we operate our relationship that way. (P12)

So we're very closely related to - those farmers have had dinner at our house. We gave them a ride from Dulles down to our house in Maryland, so we are very close to them. You know, it's hard to watch their frustration and not be able to participate directly. They participate in a fair trade certification through a conglomerate. (P2)

We've grown close to Nicaragua; we love their coffee, we love them. So our when we released our fall seasonal, and our fall seasonal uses two varietals off of their farm and it's a really cool collaboration that we have not just with them but with every bag sold, we donate a dollar to the foundation. There's a family there that heads up all the coffee growing, and he's just incredibly clean with his coffee being sold in this way, that it's being utilized to help the environment, and he himself is very in tuned with sustainability, I mean he's the most sustainable farm we've ever visited. (P17)

In reflection of participants' statements, businesses that are able to establish and maintain relationships with farms are able to ensure alignment of CSR activities with the firm's business initiatives and stakeholder values. Developing relationships with origin farmers may also assist business owners with securing more consumer trust of the FT coffee system. Developing relationships with origin farmers may help to address White et al.'s (2012) concern that consumers do not trust that their individual purchases of FT products will lead to a positive result for the third-world producer. While business owners will not be able to negotiate product prices with farmers in the FT coffee system, business owners decide to contribute additional funding for improving origin communities.

**Theme 7: Customer connection to farmer and visible change.** Of the 20 interviews in this study, 16 (80%) mentioned the need to bring the farmer and evidence of FT impact to the customer in a visible way. Many participants in this study emphasized the strength of eliciting an emotional connection and response in their customers through storytelling and pictures. Consumers desire and respond to products offering them emotional value (Green & Peloza, 2011). Many consumers have the desire to make socially responsible purchases, but to act on this desire they must be informed about the CSR attributes and impact of available products (Vitell, 2015). Participants in this study referred to ways in which they tried to connect the customer to the farmer of origin and provide customers with visible, positive change at origin. Most of these participants shared condensed versions of stories and described visual images that they provide to

customers. A sample of supportive statements for the relationship with a farm subtheme in this study is:

I think that part of the story is really important to be able to say, "this is the name of the farmer, he has 9 kids" you know - those kind of facts and information, that's really important too - so any time we can do that, we try to. Yeah, using pictures, using visuals, anything that we can share the story about the coffee with it, we will definitely try to. (P11)

So when you think about that, their theory, and this isn't proven yet by the way, is that their consumer - that will resonate with them because it is a "farmer I can know, a change I can see?" And the question I would have for Fair Trade is are they able to now be so transparent and get so small and more agile that they can communicate to us and to customers "a farmer I can know, a change I can see"? (P15)

So I think by having that website and by having pictures and stories and trips to origin and seeing these practices actually pictures of it and actually seeing it in person, being able to tell that story online is kinda what would make it happen and make that customer actually choose this product because they are making a difference. (P4)

I would say traceability for us has become more and more important other than the sticker itself. Meaning if we can identify where the farm is, that for us is really

important to be able to share the story of the coffee. For us I would say traceability has become more important to us and our customer. (P11)

One of the benefits of fair trade is there is a third party certifying what we do - in other words we are spending more money on the coffee and it is getting to the farmers - why would people just take our word for that. We have an outside group who is certifying it, but they don't necessarily know the outside group either.

Trusted institutions - not that they are governing agencies, because they aren't necessarily, but people have no trust in government these days, people don't trust companies to do the right thing. The pictures of us with those farmers, that's what gives you that credibility, that direct link, so I think that's what it is. But that takes education as well. (P12)

We live in a visual society and with all the advertising that we could do more with and stories and photographs, it would be great to be able to put a picture of the farmer that grew our Honduran coffee on our Instagram account, but we just don't have that. (P14)

Well when we profile a grower and show the impact then I'll usually share those posts with our audience, so if we went on a trip where we are introduced to someone, I'll share that. We try to personalize the fair trade process. (P19)

I think if you can provide any real life information like things about the farmers and what they are doing on the farm and how it benefits the farmer, that's just

something you would tie with the fair trade certification to sort of make that connection. (P10)

Participants who did not have personal stories and pictures of farmers and the positive changes occurring at origin as a result of FT indicated that they are reliant upon Fair Trade USA or their importers to provide them with such materials. Most participants indicated a desire for more visual and story material to be able to share with customers. In consideration of participant responses, roasters and coffee shops selling FT coffee would benefit from having more tangible stories and visual content to use in consumer education and marketing activities.

**Theme 8: Method of marketing message to consumer.** All participants in this study discussed the methods they use for promoting and communicating the FT attribute of their coffee. In accordance with Stratton and Werner's (2013) research, the participants in this doctoral study cited the importance of the timing, placement, and length of the marketing message. The method of marketing message to the consumer emerged as a major theme in this study, with conversation, events, packaging and labeling, website, and social media as subthemes.

*Conversation.* Of the 20 participants in this study, 8 (40%) said that they engage in conversation with customers as a primary method of marketing. While other methods may be the primary means of point of purchase advertising, dialogue with the consumer often supplements other marketing activities (Stratton & Werner, 2013). Eight participants in this study expressed the desire to engage in conversation with customers

about FT, because conversation offered an opportunity for deeper dialogue and detailed information. Information richness is positively associated with marketing effectiveness and competitive advantage (Ussahawanitchakit, 2012). A sample of supportive statements for the conversation subtheme in this study is:

During a normal transaction, where there is a line of 10 people, folks do not want to get a lecture on fair trade or even if that individual did, it's taking a calculated risk to take the time to explain to them, because the people behind them probably don't want to know. (P12)

We have much greater success in the face-to-face because you can talk about it more, they've got that ability to ask more questions about it where the website's kind of just one-sided, it's just whatever we offer in that little blurb is you know is pretty much it. So I think that it's much more effective when we're able to communicate it face-to-face. (P3)

We have a retail outlet and that has also given us an opportunity to talk to the customers who walk in and come through the door and talk to them about what fair trade means – they often ask what that exactly means and so it is I think it is a good educational tool for most of our customers and clients – it's a good educational tool for us to explain further what we try to do with the label. (P1)

Not everybody knows exactly what fair trade means. I think a lot of people have heard it before and have a general sense that it's a good thing but don't understand what that means, so we have a brief discussion with a number of people about

price floors, about democratically run co-ops, and how those premiums are reinvested in communities and what are projects, educations, etc. Usually it's a brief conversation like that - we train our baristas to be able to talk intelligently about that as well. (P13)

In consideration of participant accounts, conversation with consumers about FT is an effective method of advertising, but conversation may not always be possible.

Conversation is a rich medium for exchanging information (Ussahawanitchakit, 2012) and would be wise for business owners to pursue in conjunction with other methods as a part of FT coffee marketing strategy. As participants in this study mentioned, long conversations are not conducive to busy times in the coffee shop, and marketers should prepare abbreviated verbal content to share with consumers when time does not allow for extended dialogue.

**Events.** Of the 20 interviews, only 4 participants (20%) reported that they utilize events as a primary method for promoting FT coffee. A few participants said that they hoped to do events in the future as a promotional effort, but did not have the staff or resources to plan one effectively. A sample of supportive statements for the events subtheme in this study is:

We have done yearly events where we can invite customers that come into our cafes as well as accounts, and people that are local but kind of buy from our website and stuff like that to a little event that usually has music, wine, and food. We'll talk and show a slideshow of coffees and farms where we just purchased,

we also do tastings and cuppings with the new coffees we have brought in, so they can taste it for free. We have a Q&A and they can walk around, talk, ask questions about the coffee and it's a very social event to educate. (P20)

One example is we had a visit this past weekend by a number of farm - 2 farmers from Guatemala who were in the area and we brought them into our shop. We had them at the shop for 3 hours so people could meet them and they were fair trade certified farmers. Those kind of things motivate and give them a better understanding so that they can hear from the farmers firsthand how they benefit from being fair trade certified. So that experience was really good for everybody who was at the event. (P1)

In terms of one-on-one education with their customers, we do a lot of - we've done farmer's markets and things like that, and when we do demos in those stores, and we can have one-on-one with customers it is a good conversation starter and we do have people who are asking about it. (P11)

***Packaging or Labeling.*** In this study, 15 participants (75%) reported that a standard method for communicating the FT label and principles occurs on product labels. Point of purchase advertising via packaging or labeling is effective for increasing FT coffee sales (Stratton & Werner, 2013). Several participants stated that including the FT logo on bagged coffee is a simple, yet important effort to differentiate the FT coffee from uncertified coffee. Participant statements in this study concur with both Janssen and Hamm (2012) and Gerrard et al.'s (2013) findings that consumers are WTP certified

products with higher prices possessing the certification logo or label. A sample of supportive statements for the packaging or labeling subtheme in this study is:

We typically use one common bag and then the sticker designates the variety, so if we are gonna put things about origin, it has to be on that sticker which is not as much real estate. So it's mainly about fair trade and what fair trade does as fair trade coffee. And again it can be some of them, like we have a couple on the shelf here that are just the bare minimum and so they have the logo and then whatever required statement is required, and then we have another one who got 2 full paragraphs about fair trade coffee on the bag. So it can differ. And again it's hard to get more specific about co-ops because we have to do that on a sticker, however, you know. (P7)

When we initially hit the stores, we had beautiful branding, but our fair trade logo was on the back of the bag, so not facing the consumer. It's still there, but we moved another same image to the front of the bag along with the organic logo because we felt like we needed to capture the consumer before they ever pick up the bag or handle the bag, they need to see what they are looking at there is organic, fair trade coffee. (P17)

As we grew we started printing some labels that did have the fair trade logo on it, but again it's a relatively small subset and if we had 6 varieties of coffee that are fair trade, we have one label that's a fair trade label and then the attributes of our own on a sticker. The decision-making around that again, it's survival. We're

small - we're scratching for every sale, so we're just trying not to spend a lot of resources in buying rolls to put on the label that might last a year, we kind of buy a couple rolls at a time and or print our own. (P18)

On each bag that we sell we put a sticker, a fair trade sticker and it says "Every purchase matters. You choose fair trade certified, you get quality products that improve lives and protect the environment." So we put that on the bag to let them know that they are helping make a sustainable market for the farmers in these regions that usually that don't get very much for what they do. (P4)

"We simply denote on our packaging, our website, in conversation with people that our coffees are Fair Trade Certified, sustainably grown and/or Rain Forest Alliance Certified" (P8).

**Website.** Less than half of the participants in the study (40%) discussed using the company website as a means for communicating the FT coffee marketing message to consumers. Most participants who mentioned using company websites said that the content on the website linked to Fair Trade USA's website or contained Fair Trade USA-approved content about FT coffee. A sample of supportive statements for the website subtheme in this study is:

"If we are advertising the coffee via social media or something, if it is the fair trade certified offering, then we'll talk about that, but I think mostly it's through our website" (P5).

Just that the way we do it is we have short videos with the interviews that we've done with the farmer. We haven't linked, but we can link to QR codes or some other sort of embedded link on the retailer's website. We have cross-promoted the videos to Fair Trade, so that they can use it. So when they see the Fair Trade logo and go to the website, we have coffee farmers saying what we've done to improve our roads, what they've done with their crop, with their yield. And the roads are really important because you need to get the coffee down the mountain. So that's how we do it. We try to figure out how to boost the video viewing of the video, but we're still working on that. (P6)

On the website we had a description of the coffee, it would have a description of the farm and where we got it from and the coffee as well as talking about a little bit about fair trade in that description. (P20)

We have a new website coming out, that hopefully will go into a little bit more detail about marketing fair trade. As far as our website right now...it says "Look for this label. Fair Trade Certified. Fair trade is an innovative, market-based approach to sustainable development. Fair trade helps family farmers in developing countries to gain access to international markets, as well as to develop the business capacity necessary to compete in the global marketplace. By learning how to market their own harvest, fair trade farmers are able to maintain control of their own businesses and receive a fair price for their products. This leads to higher family living standards, thriving communities, and more sustainable

farming practices. Fair trade empowers farming families to take care of themselves without developing dependency on foreign aid." (P4)

***Social Media.*** Fourteen participants in this study (70%) considered social media to be an effective, and primary method for communicating promotional information about FT coffee. A sample of supportive statements for the social media subtheme in this study is:

Definitely Instagram, we have been using Instagram a lot more. We found that customers respond to Instagram more quickly, especially roasters, and a lot of roasters have Instagram, so things like Instagramming at a particular company that might be interested in our coffee - so taking a picture of the coffee, or us cupping the coffee and saying how awesome it is, we have found that that's pretty effective actually. And then Facebook - kind of we got this coffee in, here's the story, it's fair trade certified, people respond to that, they like cutting edge news. (P10)

When we had two other employees we were doing a lot of Facebook, you know Twitter, and Instagram marketing, free marketing like that, and I can kind of dabble in a little bit like that. I'll tell you that as far as any of those go, Instagram and Facebook - Instagram is the best way to market, if you have a little bit of spending money, then Facebook is your next best market. (P16)

As a whole, when we have conversations about coffee and the travels that we're doing, where we're going, talking about the farmers that we are purchasing from,

we use Facebook, Instagram, Twitter. Mostly Facebook, just because the platform is so robust, so being able to put so much information on there. (P20)

Every year, different social media platforms have taken the lead. For now, Instagram is kind of number one for us. It really plays well to what we do coffee - coffee is beautiful, the different aspects of it from farm to cup and we are able to relate that beauty through photographs and kind of convey the messages that we need or want to through photograph. Then Facebook, then Twitter in kind of that order for us. Those three platforms are the ones that we utilize the most. (P17)

**Theme 9: Marketing manager belief in FT principles.** While not all participants in the study expressed belief in and endorsement of the FT system, 15 participants (75%) made specific statements regarding their support. Directly related to the theme of marketing manager belief in FT principles, planned behavior theory (PBT) is one of the most prominent and referenced theories for predicting human behavior (Ajzen, 2011) and is an applicable conceptual framework for FT purchase intentions (Pedegral & Ozcaglar-Toulouse, 2011). Most participants in this study believed they had high level of control over the decision to carry and promote FT coffee, coupled with positive attitudes toward FT coffee. Many participants affirmed their belief in the FT system and the positive changes that origin farmers continue to experience. A sample of supportive statements for the marketing manager belief in FT principles theme in this study is:

“Certainly we feel strongly that we want to support the fair trade system, we believe it works, at least on the farmer level” (P13).

We have a consciousness as a company and that we're not in this to just make a buck; we really care and we have this phrase ‘grown by friends, roasted by friends, enjoyed by friends’” (P17).

“I mean it's fun to have an ethically-sourced product. It's helping not only the end user but also the growers” (P19).

More and more I think we are seeing that roasters are noticing the opportunity that fair trade certification gives them, but really approaching it from a business standpoint, because very small niche of roasters that are actually - I know this is brutally honest, but a very small niche of roasters that are actually buying the coffees that are fair trade because they are 100% committed to it and more to use it as a window for sales. (P9)

When I launched the business in 2008, through various media reports I was well aware of and concerned about the proliferation of child labor around the world, and also concerned by the use harmful chemicals (pesticides) being used in agricultural application – both of which were prominent in the world of coffee. With that in mind, two of the founding principles of the business were to source, roast and sell coffees that were, strictly, Fair Trade Certified and Certified Organic. (P8)

The senior level retail representative was so moved by the children and the school and um the conditions and the things that the farmers themselves said they were using their money for, that he's made a personal donation as well as incited a corporate donation from the retail entity. (P6)

“I think that we believe in it and think it's inherently good and good for the farmer, good for the consumer, good for the marketplace. That is why we do it and support it” (P20).

In reflection of the participant accounts, as long as target customers continue to be open to FT coffee (not opposing social norms), participants have a high likelihood of continuing to sell and promote FT coffee. Conversely, individuals who do not have full faith in the FT system are unlikely to continue to sell and promote FT coffee. Marketers may benefit from awareness of their personal attitudes and perceptions of the FT label, as personal attitudes may affect their ability to successfully promote FT coffee.

Participants recognized sourcing and promoting coffee with the FT label as a CSR initiative and believed that engaging in CSR activities was beneficial to increasing positive consumer response to their businesses. The findings of this doctoral study align well with Aguinis and Glavas's (2012) research regarding CSR improving the firm's reputation. Similarly, as Hildebrand, Sen, and Bhattacharya (2011) found, participants in this doctoral study also mentioned that most of their consumers respond favorably to CSR initiatives. Four participants mentioned that while they perceived selling coffee with the FT attribute to be a CSR activity, they also felt a personal responsibility to support the

FT label and would still continue to sell and support FT coffee even if it did not increase sales.

### **Unique Insights**

In addition to the themes emerging from the study data, two participants shared unique insights related to their experience that did not emerge as themes relevant to this study. One participant (P8) shared that his FT coffee business possessed both organic and FT certifications, but could no longer afford to maintain both. In an effort to appeal to existing customers, the participant conducted an informal survey in which customers responded to which certification they valued more. The participant reported that an overwhelming majority of the business' existing customers considered the FT certification to be more important than the organic certification. Customers said that they trusted the business owner and believed that the owner would continue to source and sell sustainable, health-conscious coffee even without the certification. With this information, the participant opted to discontinue the organic certification and was able to maintain existing customers. Consumer perception of corporate ethicality has a positive relationship with brand trust (Singh, Iglesias, & Batista-Fouget, 2012). This finding aligns well with Singh et al.'s (2012) research identifying a positive correlation between brand trust and consumer loyalty. A sample of P8's insights related to customer trust is as follows:

So I did a survey, not anything formal, you know a strawman and I asked people if they had to choose between organic and the fair trade certification, which one

would you pick? And you know, nearly every one of them said fair trade is the most important.

They said that they knew me and trusted me to choose sustainably grown products in order to maintain the quality and health side of things. (P8)

Another participant (P12) shared insights related to a fair trade, organic campaign that the business had launched several years ago. While the participant labeled the campaign as *unsuccessful*, the participant noted that through the campaign and conversation with customers, interesting and helpful information emerged. The coffee shop offered a decaf, standard house blend, single-origin estate, and an FTO coffee daily in a self-serve format, with each option priced the same. Even with price being neutral, consumers purchased the FTO coffee the least, with even the decaf outselling the FTO.

Participant 12's explanation of customer behavior was that coffee drinkers are habitual consumers and desire consistency. While FT consumers may be less habit driven than other consumers (Rotaris & Danielis, 2011), this participant's desire for consistent taste became a barrier for FT coffee sales. Rotaris and Danielis (2011) mentioned flavor as an influential factor in consumer WTP for FT coffee. The concept of habit and a consumer's desire for consistency aligns well with Liu-Thompkins & Tam's (2013) conclusions that a consumer may purchase a particular product despite competing offers because of the stability and convenience it provides the consumer.

A sample of P12's insights related to consumer desire for consistent taste is as follows:

There is a section of the clientele, the consumers, that want to experiment and taste something different all the time, but the vast overwhelming majority of your coffee customers, want to come in and have that coffee be amazingly consistent, be the same cup of coffee they had yesterday and the day before and the day before that. Coffee drinkers, probably more so - it'd be hard to say compared to other industries where they line up - but coffee customers certainly are creatures of habit and coffee is a habit.

Our thought is we want to expose people to all these different coffees, but what if what they really want is the same, consistent coffee every day? They may love the fair trade Peruvian, but then it doesn't happen again for 3 weeks, so if you're only getting it for a couple of days and then it's basically on to the next few coffees, are you pulling the rug out from under that consumer and basically telling them to get the house coffee. Because it's going to be the same today, the same tomorrow, and that's what they are really looking for, there's that comfort level involved. (P12)

In reflection of P8 and P12's accounts, marketers may want to evaluate consumer perceptions of the FT label in regards to trust and evaluate consumer behavior patterns related to habitual loyalty. Participants mentioned that when planning and executing marketing strategies, businesses have to consider individual consumer segment demographics. Consumers in different segments of the target market may respond to advertising and promotional material in different ways.

### **Applications to Professional Practice**

The previous themes provide business owners and marketing managers with information for developing strategies and decision making processes to successfully market FT coffee products. Understanding these themes can assist in developing marketing material for successful FT coffee promotion. Findings from this study add to the existing body of knowledge on past research on marketing of FT coffee and provide business owners with possible information to improve marketing strategy and decision-making processes for the promotion of FT coffee. Consumers have the ability to positively affect origin farmers through FT coffee purchase. Consumers believing that they have a high level of control and positive attitude toward a purchase are likely to purchase the product (Ozcaglar-Toulouse, 2011). As consumer knowledge and education of the FT implications for coffee increase, consumer demand and purchase of FT coffee is likely to increase (Murphy & Jenner-Leuthart, 2011). Educating consumers on the effects and implications of the FT label and providing customers with a connection to a farmer and visible change may be instrumental in increasing profits for FT coffee.

Business leaders, marketing professionals, and others involved in the FT coffee supply chain can use my study's findings to develop strategies and decision-making processes that aid FT coffee promotion efforts. Marketers need to include consumer education as a part of their marketing strategy to optimize consumer belief in the FT label and help to generate demand. Using a combination of methods for communicating the marketing message to the consumer could result in stronger positive consumer responses.

### **Implications for Social Change**

Successful promotion of FT coffee is important not only for marketers, but for others in the FT coffee industry. Findings from this study may have valuable implications for exporters, importers, and origin farmers in the FT coffee supply chain. The findings have revealed that several factors related to developing marketing strategy for successful promotion of FT coffee. With understanding of these factors, origin farmers might be able to partner with business owners to increase sales of FT coffee in the United States. Increasing the total sales is important to farmers' business sustainability and their ability to provide for their families and improve their living conditions (Taylor, Murray, & Reynolds, 2005).

Using study findings, business owners interested in increasing the success of their FT coffee campaigns may consider a trip to origin. Through trips to origin, more relationships might be established between FT farmers and others in the supply chain, and existing relationship quality may be enhanced. As farmer-business owner relationships improve, business owners might decide to contribute additional funding for improving origin communities. Participants in this study mentioned that a trip to origin inspired business owners to contribute additional funding to improve agricultural and community facilities.

Prosperous promotion of FT and sustainable coffee helps to drive consumer demand. Increasing consumer demand for FT and sustainable coffee may result in increased sales and revenues for disadvantaged origin farmers. Farmers might use the

profits to increase their standard of living and reinvest resources into their local communities. Through support of origin farmers and their growing efforts, American consumers can continue to enjoy artisan coffee that otherwise may not be available.

### **Recommendations for Action**

Developing a successful marketing strategy involves consideration of several factors. These findings could help business leaders and marketing professionals to employ strategic decision-making when crafting marketing approaches for FT coffee promotion. I therefore recommend that marketers and others in the FT coffee supply chain use the findings of this study to strengthen marketing strategy. Marketers and business owners should work to develop promotional materials that connect the consumer to the origin farmer and visible positive change to increase consumer knowledge and loyalty to the FT label.

Business owners and marketing professionals involved in developing marketing strategy and related decision-making should also be aware that their belief (or disbelief) in the FT system is indicative of their personal commitment and impacts marketing strategy. It is important for business owners to align CSR activities with business objectives to optimize impact (Hildebrand, Sen, & Bhattacharya, 2011). I therefore recommend business owners to assign FT coffee marketing strategy development tasks to individuals who are knowledgeable and passionate about FT coffee. Marketers should strategically disclose these CSR initiatives because consumers need relevant and concise information to act on intended ethical purchase behavior (Xinming, 2013).

The findings of this study can assist business leaders, marketing professionals, and others in the FT coffee supply chain to make decisions that aid FT coffee promotion efforts. Marketing managers in the FT coffee industry may use this study's results to develop strategies for the successful promotion/marketing of FT coffee. Organizations and professionals can distribute the findings of this study via trade and industry journals, conferences, and academic research journals.

### **Recommendations for Further Research**

Limited research exists on developing strategies and decision-making processes for the successful promotion/marketing of FT coffee. Recommendations for future studies involve addressing some of the limitations of this study, specifically, the small sample size and potential demographic variables affecting how marketing managers in this sample promote FT coffee in their geographic location. Notable differences existed between participants located on the east coast and participants located on the west coast with respect to reports of customer knowledge and behavior. Future researchers should explore marketing strategies and decision-making processes by geographic region, rather than the United States as a whole. Furthermore, some participants in the study operate only on a B2B level, some participants operate only on a B2C level, and others operate in both B2B and B2C capacities. Marketing strategy and decision-making processes at the B2B level are likely to be different from B2C, and future researchers should consider this.

Through employing a mixed method or quantitative method study, future researchers could examine the importance and ranking of factors identified in this study. A future study for measuring effectiveness of each method of distributing the marketing message to consumers could assist marketers and business owners in identifying the optimal approach. Future studies measuring the influence of customer knowledge on the development of promotional materials for consumer education may further assist marketers and business leaders with information for successful marketing strategy.

Finally, many of the participants in this study reported their experiences and perceptions of consumer behavior and activity (developing strategy and making decisions according to such activity), though most marketers had not formally researched consumer perceptions. There is a need to conduct research on decision-making and purchase processes at the consumer level. Consumers' perceptions and behaviors affect marketing strategy and decision-making development.

### **Reflections**

The purpose of this study was to explore the lived experiences of 20 marketing managers in the FT coffee industry across the United States with regard to marketing strategy decision-making process development. The data collection process involved personal interviews with each participant and follow up interviews for member checking. Through the research process, I had the opportunity to engage in rich conversation with individuals with experience in the industry and gain diverse insight. Although, most

participants had busy schedules, participants were enthusiastic about participating and seemed to enjoy discussing their experiences with FT coffee.

Prior to beginning the study, I was skeptical that I would gain information that I had not already read in preparation for the study, but I was wrong. During the data collection and analysis process, I learned new details about promoting FT coffee, regarding the importance of providing consumers with a connection to farmers. During the interview process, I also realized the significance of marketing manager belief in the FT system and how this belief can affect how the marketer should strategize FT coffee promotion.

### **Summary and Study Conclusions**

CSR activities such as FT can positively influence financial performance (Gazzola, 2012; Tang, Hull, & Rothenberg, 2012), but many business owners are not getting a favorable return on these investments (Di Giuli & Kostovetsky, 2014). Improving marketing for FT coffee could lead to better consumer response and increased sales. The purpose of this study was to explore factors involved in the marketing strategy and decision-making development process for FT coffee. I used the phenomenological approach with a purposeful (criterion) selection to explore the lived experiences of 20 marketing managers involved in the promotion of FT coffee.

From the findings of this study, I concluded that consumer knowledge and education as well as connecting the customer to origin farmers and visible change are instrumental in successful promotion of FT coffee. Individuals involved in developing FT

coffee marketing strategies could benefit from establishing and maintaining relationships with origin farmers for optimal alignment of strategy and design of promotional materials. Business leaders and marketing professionals can use the findings of this study to develop marketing strategies and decision-making processes for the successful promotion of FT coffee and to increase awareness of FT coffee marketing implications. The findings of this study could contribute to positive social change through increased FT coffee sales that support third-world farmers and FT coffee farming communities.

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