

# INFORMATION TECHNOLOGY, E-DATING, AND MARKETPLACE ACTIVITIES

by

ANGELINE GRACE CLOSE

(Under the direction of GEORGE M. ZINKHAN)

## ABSTRACT

This dissertation focuses on three marketplace activities and their associated consumer behaviors: a) onground “o-dating”, b) electronic “e-dating”, and c) Valentine’s Day (e.g., as it is associated with romantic rituals and holiday retail and e-tail). Multiple methods are used to address the research objectives.

This dissertation is a series of four research chapters, which lead to a concluding chapter focusing on the implications to marketing theory and practice, limitations, and avenues for scholars to extend this research.

INDEX WORDS: by subject: Consumer behavior, O-dating, Information technology, Cultural shift, E-dating, Online community, Virtual relationships, E-tail, Holiday retail, Market resistance

by method: Multi-method study, Survey, Depth interview, Focus group, Consumer observation, Internet diary

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## DEDICATION

To family, friends, and consumers.

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## CHAPTER 1

### INTRODUCTION, LITERATURE REVIEW, AND DISSERTATION STRUCTURE



## INTRODUCTION

"All our knowledge falls within the bounds of possible experience." -Immanuel Kant

*Expanding the Bounds of Possibility with Technology.* As the philosopher Immanuel Kant eloquently points out, our knowledge falls within the realm of what is (humanly) possible to experience. Perhaps if Kant were alive today, in the midst of technological advancements and high-speed connections, he would point out that some experiences do not necessarily exist in the onground "lived" world. In the 21<sup>st</sup> century, experiences exist in the mind, in cyberspace, or in a combination of these environments. The boundaries of possible human experiences are expanding, along with technology, on a daily basis. We are in the midst of a paradigm shift- a digital revolution, due to the emergence of the Internet into modern culture and society. Just as individuals court each other with peer-to-peer (i.e., P2P) interaction, marketers, advertisers, businesses, and organizations should court the digital revolution.

*Romancing the Digital Revolution.* It is important to consider the digital revolution within the context of P2P exchange and marketplace activities. Some examples of related marketplace activities include dating, gift exchange, entertainment, leisure activities, and sports. Consider the marketplace activities associated with dating and electronic dating (i.e., e-dating). Dating traditionally has resulted from a face-to-face interaction, or by third party matchmakers (e.g., friends, family members). E-dating is an activity in which a consumer, using electronic devices and an Internet connection, seeks interaction with other peers with a potential for romance. Computer-mediated-

communication (i.e., CMC) is the means of fostering the P2P interaction. P2P networks, such as e-dating, are one of the e-services that have experienced the most growth in the numbers of visitors and subscribers.

As implied above, there are many changes in human behavior and marketplace activities that result from emerging information technologies (i.e., the Internet). Of course, there are too many to summarize all in one study. This dissertation focuses on three marketplace activities and their associated consumer behaviors: a) onground dating, b) e-dating, and c) Valentine's Day (e.g., as it is associated with romantic rituals). These activities are chosen for study because they represent an area of consumer behavior that is rapidly evolving. Much of consumer behavior has focused on a single consumer's relationship to a business or organization; however, it is important to embed the importance in peer-to-peer (i.e., P2P) communication and relationships. Studying consumer behavior through the lens of dating enables researchers to look at how organizations play a role in initiating, facilitating, fostering, and influencing P2P relationships. Furthermore, companies are often marketing and selling goods, especially entertainment and leisure activities, to a couple—which involves synergies over and beyond marketing separately to each partner. One of the most important advertising and marketing times for romantically-related goods is Valentine's Day—a holiday traditionally associated with celebrating romantic relationships. Holiday e-tail sales rose twenty percent in the U.S., (to \$13.2 billion) from FY2004-2005 (Forrester Research 2005), and Valentine's Day accounts for a substantial portion of e-sales as it is one of the only true “gift holidays” in the U.S. A consumer-driven study of the Valentine's Day market has

potential to generate a wide variety of managerial implications (e.g., for retailers and e-tailers) and to develop and extend theory.

Dating and Valentine's Day activities are coherently linked in several ways. They all can be organized around a central area of romantic consumer rituals. Understanding of these rituals may provide insight to consumer-based marketing strategies in many industries (e.g., jewelry, luxury, gift, floral, greeting card, confectionary, beauty, travel).

### **Ritual Behavior and Romance**

Ritual behaviors are a key concept in this dissertation. A ritual is a symbolic, scripted, expressive activity composed of multiple, episodic, behaviors (Rook 1985). This type of activity is carried out with a sense of formality and seriousness, and is repeated over time (Rook 1985). Although there are many different types of rituals (e.g., religious, aesthetic, rites of passage, cultural, family, personal), the focus here is on dating rituals and Valentine's Day rituals. The two specific cases represent examples of personal, small group, aesthetic, family, religious, and cultural rituals.

This category of consumption is worthy of focus for a number of reasons. First, dating and related marketplace activities represent key groups of socio-culturally practices in the U.S. Many individuals and couples recognize Valentine's Day as a specific period to "carry out" these dating rituals. Second, dating and "the romantic holiday" represent a latent cultural tension, where there may be elements of hesitancy, uneasiness, and resistance associated with these practices, trends, institutions, observances, and/or festivities. Third, dating, e-dating, and Valentine's Day are associated with massive amounts of consumer spending in their associated industries.

For example, e-dating has become over a billion dollar (annual) industry (Online Personals Watch 2005).

### **Objectives of this Dissertation**

There are seven main objectives of this dissertation. (See Table 1.1 for a summarized description of the chapters). The majority of the objectives pertain to the Internet's emergence; the remaining two investigate content in the onground marketplace. All objectives are currently investigated in the context of the U.S. marketplace. The seven broad objectives are:

1. To explore the use of the Internet to initiate and/or facilitate online and onground dating among young (college-aged) daters (Chapter 2),
2. To reveal Internet daters' concerns and outcomes related to e-dating and computer-mediated-communication (i.e., CMC) (Chapter 2),
3. To investigate Valentine's Day rituals, as enacted by various consumer segments (Chapter 3),
4. To explore Valentine's Day from the viewpoints of both retail and e-tail managers (Chapter 4),
5. To provide a set of systematic implications for retailers and e-tailers (Chapter 4),
6. To identify and discuss key theories that have been developed to understand key themes relating to e-dating and Valentine's Day, (Chapters 2-5),
7. To extend current theories and develop new theories in the area of consumer resistance (Chapters 4-5).

Key theories explored here include: social exchange theory (Chapter 2), materialism theories (Chapters 3 and 4), monadic gift theories (Chapter 4), and resistance theories (Chapters 4 and 5). Each theoretical concept is a tool of explication. A concluding chapter with limitations, implications, focused discussion of resistance theory development, and avenues for future research is presented in the final chapter (Chapter 6) of this dissertation.

The following themes are developed in this research: ritualized behavior, technology and the consumer, computer-mediated-communication, self-disclosure, intimacy, time, love, altruism, obligation, expectation, gift exchange, role exhaustion, message overflow, over-commercialization, technology glitches, and market resistance. Key demographic variables and informant descriptors include: relationship status, length of romantic relationship, age, and gender. A spectrum of complementary methods is employed to address the research objectives. The online environment is a virtual place to discover and reveal new insight on semiotics, meanings, motivation, choice, and human experiences that are especially suitable for inquiries on the somewhat personal and intimate topics of romance and relationships. Thus, both online and onground behaviors and exchanges are investigated in this dissertation. In the following section, a framework and overview of the research design, methods, and research questions is provided.

### **Dissertation Framework, Introduction to the Literature, and Research Design**

This dissertation embraces more than just contexts of related consumer behaviors (e.g., dating, e-services, holidays). Also, it explores larger theoretical questions. Various

theoretical constructs (from marketing, sociology, psychology, mass communication, and management information systems) are investigated to illuminate and clarify the processes and structures that underlie specific behaviors (e.g., gift exchange, grooming). A systematic interpretation of the findings from the onground and online environments is provided using theoretically-based concepts of technology acceptance, social exchange, materialism, and resistance. The ultimate goal is to extend existing theories based on the findings.

After this introductory chapter (Chapter 1), comes a study of consumer dating behavior and technology from a social perspective (Chapter 2). Specifically, Chapter three presents further understanding of these phenomena in the context of Valentine's Day. Chapter four builds on the consumer study of Valentine's Day to incorporate retailers' perspectives and present managerial recommendations. The last research chapter (Chapter 5) introduces a theory of market resistance in the context of Valentine's Day. The dissertation ends with a concluding chapter (Chapter 6), which organizes key findings, synthesizes their meaning, discusses implications for communications and computer-mediated communication (CMC) theories, and presents managerial implications. The dissertation concludes with limitations and directions for future research.

The organizational summary of the dissertation is illustrated in Table 1.1.

**Table 1.1 Dissertation Overview**

<b>Chapter</b>	<b>Research Questions</b>	<b>Methods (Sample)</b>	<b>Theory</b>
1. Introduction, Literature Review, and Dissertation Structure	--	--	--
2. "Romance and the Internet: The E-Mergence of E-Dating"	1. To what extent do young (college-aged) daters use the Internet to initiate and/or facilitate dating relationships? 2. What concerns and outcomes do they experience before, during, and after searching, posting, and/or joining an Internet dating/singles site?	Questionnaire; Depth Interviews; Focus Groups; Internet Postings (Registered e-daters)	Social Exchange Theory (Emerson and Cook 1978; Thibaut and Kelley 1959)
3. "A Holiday Loved and Loathed: A Consumer Perspective of Valentine's Day"	1. What are the consumer behaviors and rituals associated with Valentine's Day? 2. What are some key consumer meanings and emergent themes associated with the holiday? 3. What roles do marketing communications play in shaping the holiday?	Survey; Focus Groups; Internet Postings; Consumer Diaries (Consumers in a romantic relationship(s); Females in romantic relationship(s); Internet users posting on Valentine's Day topics)	Exchange Theories- a) Economic b) Social (Emerson and Cook 1978; Thibaut and Kelley 1959) c) Agapic Love Belk and Coon (1991; 1993)
4. "A Multi-Method Inquiry of Valentine's Day: Consumer Perspectives and Retail Strategy"	1. What does the Valentine's holiday mean to consumers (i.e., with a focus on identifying implications for retailers and e-tailers)? 2. What are the best ways for retailers and e-tailers to shape consumer expectations and experiences related to this holiday	Managerial Interviews; Retail Observations; Focus Groups; Survey; Consumer Diaries; Internet Postings (Retail executives; Females in a romantic	Materialism Theories- a) Terminal Materialism; b) Instrumental Materialism (Csikszentmihalyi and Rochberg-Halton 1981); Resistance Theory; Monadic Gift Theories

	(i.e., to cater to the Valentine's Day holiday)?	relationship(s); Consumers in romantic relationship(s); Internet users posting on Valentine's Day topics)	
5. "Market Resistance and Valentine's Day: A Re-evaluation of Resistance Theories" (JCR Submission)	<p>1. What is "market resistance" defined, so as to enhance interdisciplinary scholarly research and practice,</p> <p>2. How can resistance theory be expanded (e.g., to the context of Valentine's Day),</p> <p>3. How can consumers' resistance related to this holiday be understood and explained?</p> <p>4. What drives consumers' resistance to a retail holiday market?</p> <p>5. What are consumers moving towards via their acts of resistance?</p> <p>6. What are some implications of market resistance for retailing and interdisciplinary scholarship?</p>	Focus Groups; Internet Postings; Consumer Diaries Depth Interviews with Managers (Consumers in a romantic relationship(s); Females in romantic relationship(s); Singles; Internet users posting on Valentine's Day topics)	Resistance Theory

Following, is a closer look of each of the phenomena surrounding each chapter.



## Introduction to the Chapters

The dissertation research begins by brings the reader up to date with the consumer behavior of dating, and how this consumer behavior has evolved through the twentieth and twenty-first centuries in the U.S. It is proposed that many formalities seen in courtship are dissolving; yet new dating trends are emerging along with technological advancements (e.g., the telephone, the automobile, the personal digital assistant). Understanding “traditional” dating rituals are important for interpreting associated new behaviors in the area of e-dating.

The second chapter, “Romance and the Internet: The E-Mergence of E-Dating”, introduces the blending of technology with the onground dating rituals of the U.S. The focus is to investigate consumer behavior in the era of e-dating, which is a process that is based on social exchanges mediated through information technology (in most cases Internet-enabled). Here, an e-dater is defined as a consumer who utilizes an electronic (e.g., the Internet) exchange (i.e., posts to, replies to, subscribes to) in order to seek a dating relationship with another consumer-- typically with someone they have not met. A consumer who merely engages in search behavior is not classified as an e-dater in the current research. A secondary focus of this chapter is to examine the co-existence of online and onground behaviors. E-dating behaviors and themes are proposed as either initiators and/or facilitators of onground dating (O-dating).

In continuance with a higher-order theme of romance and romantic-oriented consumer behaviors as they relate with technology, the fourth and fifth chapters focus on online and onground consumer behaviors related to Valentine’s Day. Chapter three (“A Holiday Loved and Loathed: Behaviors and Rituals for Valentine’s Day”) focuses entirely

on the consumer perspective of Valentine's Day, with an emphasis on discussing exchange theories (e.g., economic exchange, social exchange, agapic love-based exchange).

Chapter four ("A Multi-Method Inquiry of Valentine's Day: Consumer Perspectives and Retail Strategy") focuses on the holiday through a managerial (i.e., retail, e-tail) lens. Like the preceding consumer ritual study, this research includes consumer-based research. However, consumer meanings are explored with a focus on identifying implications for retailers and e-tailers. This retailing lens is used to introduce and extend theories of marketplace acceptance and resistance along with forms of social exchange (e.g., gift exchange) and meanings (e.g., their relationship to materialism).

The e-tail component of this retail lens is particularly important because of a steady and substantial projected increases in the following: a) the number of households with a personal computer (i.e., PC) and broadband connection (e.g., 29% of all U.S. households in 2005, 37% in 2007, 44% in 2009), b) e-tail sales (e.g., US\$ 144.6B in 2004, US\$ 207.1B in 2006, U.S.\$ 371.1 in 2008), c) e-retail site improvements and technological innovations adopted by e-tailers (e.g., virtual shopping carts, gift advisors, security check out features). As a result, e-Commerce is projected to account for thirteen percent of all retail sales in 2010.

The dissertation concludes with a concluding research chapter (Chapter 5), titled "Market Resistance, Alternative Consumption Rituals, and Valentine's Day: A Re-evaluation of Resistance Theories." This chapter is devoted to developing a theoretical framework that derives from the empirical findings. Limitations are provided along with

specific questions to promote future research in this emerging area of consumer behavior.

## **Overview of Research Design, Methods, and Research Questions**

The following section contains a brief introduction, including the research objectives and methods, of each of the main research chapters.

## **Overview of Chapter 2: “Romance and the Internet: The E-Mergence of E-Dating”**

### **Brief Introduction to Chapter 2**

The overall objective of this portion of the research is to explore the new phenomenon of e-dating. The study seeks to particularly determine insights on:

RQ 1. To what extent do young (college-aged) daters use the Internet to initiate and/or facilitate dating relationships in the U.S.?

RQ 2. What concerns and outcomes do they experience before, during, and after searching, posting, and/or joining an Internet dating/singles site?

### **Methods, Chapter 2**

Multiple methods address the above research questions, including: a) questionnaires, b) depth interviews, c) focus groups, and d) analysis of Internet postings. The sample criteria is that the individual is an e-dater, defined in a newspaper recruitment advertisement as individuals who actively browse or subscribe to an Internet dating site with intentions of interacting with other e-daters. Each informant was screened to ensure experience with e-dating before inclusion in the study, and received thirty-five dollars in exchange for their participation.

## **Theoretical Perspective, Chapter 2**

Social exchange theory (e.g., Thibaut and Kelley 1959) is selected as the theoretical perspective here, because this theory has been applied to guide the intimate nature and cyclical process of human behavior in social exchanges. Dating may be considered as one form of social exchange. Social exchange theory makes the following assumptions: a) that acts of are choices of rational selves, b) that each individual has the ability to choose the optimal option, c) that each individual is willing to choose the optimal option, and d) that the individual may accurately anticipate the payoffs of different decisions (Thibaut and Kelley 1959). Sometimes, there is a "bilaterally discordant" human dilemma of choice (Thibaut and Kelley 1959), as explored in the context of e-dating choices.

## **Overview of Chapter 3: “A Holiday Loved and Loathed: A Consumer Perspective of Valentine’s Day”**

### **Brief Introduction to Chapter 3**

As the prior chapter shares an exploration of emerging themes of e-dating as a form of social exchange, Chapter three now studies consumer perspectives and behaviors associated with the romantic holiday, Valentine’s Day. Dating is explored, along with other related consumer behaviors (e.g., romantic gift exchange) and relational contexts (e.g., familial). It is proposed that consumer rituals for this holiday evolve along with the holiday and with technology.

### **Research Objectives and Guiding Questions, Chapter 3**

RQ1. What are the consumer behaviors and rituals associated with Valentine’s Day?

RQ2. What are some key consumer meanings and emergent themes associated with the holiday?

RQ3. What roles do marketing communications play in shaping the holiday?

### **Methods, Chapter 3**

Multiple methods are used here, including: diaries, surveys, and observations. Eighty-eight consumers kept diaries related to their thoughts and behaviors concerning the holiday. These diary entries focus on: a) cultural rituals, b) male roles, c) female roles, d) enjoyment factor, and e) the comparison of Valentine’s Day to other holidays. Online diary entries and Internet postings were also tracked and coded. For a second approach, one hundred surveys were administered to individuals in a romantic relationship. In total, sixty-four surveys (thirty-two for each gender) were analyzed.

Survey items cover daters' expectations, behaviors, perceptions, and the commercial aspects of this holiday. In addition, respondents indicated their age, gender, and whether they are in a "new relationship" (less than six months) or a more established relationship (six months or more) as suggested by Huang and Yu (2000). Another method of data collection consists of focus group interviews. Females were selected for the group interviews, as males may prevent some of the females from sharing their uncensored thoughts. The focus group participants included six females (three in a new relationship and three in a more established relationship). The last method consists of store observations in order to witness aspects of commercial preparation for Valentine's Day.

### **Theoretical Basis, Chapter 3**

Three different, yet complementary theories of exchange are investigated in chapter 4: a) economic, b) social, and c) agapic love (Belk and Coon 1991; 1993). Many of the findings on gift exchange behavior among couples are discussed in light of these three exchange theories.

## **Overview of Chapter 4: “A Multi-Method Inquiry of Valentine’s Day: Consumer Perspectives and Retail Strategy”**

### **Brief Introduction to Chapter 4**

Recall, Chapter three reports findings related to the spectrum of rituals, meanings, and commercial efforts that buyers attribute to this holiday and associated purchases. Consumer-ascribed meanings of this holiday are explored here-- however through a retail lens. We broaden the scope of this holiday by conceptualizing it as more than a time for celebrating romance and romantic relationships. We study it with respect to a series of non-romantic and non-traditional relationships. In addition, we include shoppers’ relationships with products, brands, websites, and retailers/e-tailers.

While some consumers may celebrate feelings of affect or love for this day, other consumers may not particularly like this holiday for a number of reasons. Rooted in resistance theories, the phenomenon of market resistance (i.e., some individuals or groups exude various degrees of resistance from hesitation to boycotts of the holiday) is explored. A similar phenomenon of “retail resistance” may apply to retailers and e-tailers that the resistant consumers associate to Valentine’s Day. It is possible that some of the insights generated from a comprehensive study of Valentine’s Day will serve as a platform for cross-cultural studies and may be generalizable to other gift-oriented holidays in the U.S. or abroad.

### **Research Objectives and Guiding Questions, Chapter 4**

The first objective of Study four is to investigate Valentine’s Day, as it is celebrated by adults in the U.S., from the perspectives of different segments of consumers,

controlling for gender, relationship status, and relationship length. The second objective is to explore the holiday from the viewpoints of retail managers and executives who strategize around Valentine's Day. A final objective is to provide implications for retailers and extend extent theories. Two research questions guide these objectives:

RQ1: What does the Valentine's holiday *mean* to consumers (i.e., identifying implications for retailers and e-tailers)?

RQ2: What are the best ways for retailers and e-tailers to shape consumer expectations and experiences related to this holiday (i.e., to cater to the Valentine's Day holiday)?

## **Methods, Chapter 4**

Chapter four deploys a multi-method approach to further understand Valentine's Day from both a consumer and a retail perspective. Six complementary methods are used from approximately six years of data collection (2000-2005). The six phases of data collection include:

- 1) interviews with retail executives and managers;
- 2) observations and interactions in the retail environment;
- 3) a survey of consumers in a romantic relationship;
- 4) analysis of diaries from consumers with various relationship statuses;
- 5) analysis of online diaries and postings; and
- 6) group interviews with females in a dating relationship.

These phases of data collection combine to a more holistic study of Valentine's Day from various consumer segments and retail practitioner perspectives.



## **Theoretical Perspectives, Chapter 4**

We introduce various alternate theories along with the findings in Chapter four. These theories include: a) materialism theories (e.g., Csikszentmihalyi & Rochberg-Halton 1981), b) monadic gift theories (e.g., Mick & DeMoss 1990a, 1990b, 1992, Mick, Demoss & Faber 1992), and c) resistance theories (e.g., Perls et al. 1951, McGuire 1964, Brehm 1996, Newman 2002).

## **Overview of Chapter 5: “Market Resistance and Valentine’s Day: A Re-evaluation of Resistance Theories”**

### **Brief Introduction to Chapter 5**

Findings from the previous chapters show that consumers express attitudes of resistance and demonstrate resistance behaviors (often in the form of non-behaviors). Chapter five, is devoted to an inductive approach of studying resistance as it is applied to the Valentine’s Day market. While concepts such as gift resistance and retail resistance are covered, the primary focus is on resistance to an entire market (e.g., the Valentine’s holiday market) and the marketplace activities (e.g., dating, card/gift exchange) associated with that market.

### **Research Objectives and Guiding Questions, Chapter 5**

The objective of the final chapter is to develop and explicate a theoretical framework based on the empirical findings presented in the previous chapters. The broad objective is to expand resistance theory to the context of retailing holidays and gift giving holidays.

RQ1. What is “market resistance,” defined so as to enhance interdisciplinary scholarly research and practice?

RQ2. How can resistance theory be explained (e.g., to the context of Valentine’s Day)?

RQ3. How can consumers’ resistance related to this holiday be understood and explained?

RQ4. What drives consumers’ resistance to a retail holiday market?

RQ5. What are consumers moving towards via their acts of resistance?

RQ6. What are some implications of market resistance for retailing and interdisciplinary scholarship?

## **Methods, Chapter 5**

The theoretical framework will be based on evidence from multiple-method data gathered over a seven-year period in the context of Valentine's Day (please see Chapters 3, 4, and 5). This data will be analyzed through the lens of resistance.

## **Theoretical Perspectives, Chapter 5**

In brief, resistance theory purports that individuals resist persuasive messages and have a negative reaction against change (Perls et al. 1951, McGuire 1964, Brehm 1996, Newman 2002). This reaction may be affective, cognitive, and/or behavioral. Resistance theory states that human resistance may be a motivational state (i.e., attitudinal) or an outcome. Furthermore, there is passive resistance and active resistance. Passive resistance involves only one individual (e.g., a consumer's refusal to purchase from a certain retailer), while active resistance involves more than one individual (e.g., a boycott). Such theory, however, has typically been employed to explain and predict an individual's resistance to an individual message, or "persuasive attack". This current chapter extends the theory to the scope of resistance to an entire market (e.g., the Valentine's Day market and its associated holiday marketplace activities). As compared to the extant studies guided by resistance theory (e.g., in psychology, mass communications), this approach studies resistance to a particular market as a result of lengthy and built up experiences and attitudes associated with it.

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## CHAPTER 2

### ROMANCE AND THE INTERNET: THE EMERGENCE OF E-DATING<sup>1</sup>

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<sup>1</sup> Close, A.G. and G.M. Zinkhan. 2004. *Advances in Consumer Research*. 31:153-158.  
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## ABSTRACT

Here, we explore the meaning and essence of a relatively new phenomenon-- electronic dating (E-Dating). We define key terms (e.g., E-Dating, O-Dating, Netiquette) associated with this emerging aspect of dating. In our exploratory study, we focus on the Internet-based form of E-Dating, by tapping into the experiences of college-aged singles in the U.S. Our methods include a questionnaire, in-depth interviews, and a series of focus group interviews. We assume that through narrative description, human experience can be consciously expressed and explained. We furthermore consider online dating as a kind of social exchange and describe emerging socio-cultural, semiotic, and humanistic trends.

## INTRODUCTION

*"Now fate has met its match!"* (Yahoo Personals, 2003)

Dating, or the process of ritualistically courting a partner with a perceived aspect of romantic potential, is a component of consumer behavior that is currently in a transition stage. Dating behavior, namely in America, is "e-merging" along with increased online capability. In 2001 there were more than 5 million regular users of dating or singles websites (Stone, Rogers, and Platt 2001), and revenue from dating sites are expected to rise over 100 percent- from US \$313 million (2002) to \$642 million by 2007 (Higgins2003). Currently, in 2003, online dating is a \$304 million a year industry, aiming primarily to target the younger, presumably single market (Higgins 2003).

There is a dating site for almost every conceivable religion (e.g., catholicingles.com), region (e.g., chicagosingles.com), or cultural background (e.g., globalrishta.com). The most popular online dating services (e.g., match.com; emode.com; kiss.com; matchmaker.com, lavalife.com), however, draw patrons and curious counterparts from all financial, economic, and social backgrounds to these heavily advertised sites. Amazingly, the leader match.com reports 5.7 million hits *per month*, matchmaker.com reports 3.2 million hits per month, and five other sites are in the million plus range. In terms of subscribers, the leading enterprise, *Udate Properties*, boasts ten-million individual subscribers (*Newsweek* 2003). Such dating sites provide a virtual opportunity for consumers to interact, and have the potential to significantly affect formal



traditional dating patterns, rituals, scripts, and motivations on both the individual and the societal level.

Thus, two central questions guide the present study. Primarily, “To what extent do young (college-aged) daters use the Internet to initiate and/or facilitate dating relationships in the U.S.? Furthermore, “What concerns and outcomes do they experience before, during, and after searching, posting, and/or joining an Internet dating/singles site?” In pursuing these questions, we seek to:

1. understand the emergence of electronic (Internet) dating via informants' experiences,
- and
2. present qualitative data that describes and typifies themes of Internet dating.

### **Emergence of Netiquette-Based E-Dating**

Based on our exploratory questionnaires, aspects of informants' definitions were tallied to construct definitions. We composed five terms for this study:

1. O-Dater (Offline)- One who only utilizes traditional, off-line means to seek others for possible romance.
2. E-Dater (Electronic) - One who utilizes an electronic (e.g., the Internet) exchange (i.e., posts to, replies to, subscribes to), to seek a dating relationship with another, typically with someone they have not met. This exchange is often one-way. We do not include one who merely searches on dating sites as E-Daters.

3. Success- A mutual online interaction (exchange) in E-Dating. The exchange may instantaneously (e.g., ICQ) or be lagged (e.g., an e-mail). Success may precede an offline date, yet an offline date is not always the goal of E-Dating.

4. Dating Etiquette-The pre-established, societal and culturally based set of norms, traditions, and rituals in American O-Dating history. Much dating etiquette is gender-based.

5. Dating Netiquette-The emerging set of norms and expectations apparent in E-Dating relationships, generally less stringent/more causal than previous dating etiquette.

American dictionaries term a *date* as “an engagement to go out socially with another person, often out of romantic interest, or “one's companion on such an outing” (dictionary.com), we feel there is a need for a separate component for nontraditional (e.g., Internet) dating. Thus, our working definition of an E-Date is:

*the pre-set time to “meet” in a chatroom or on a dating/singles website to instant message (IM), or the actual online social exchange. The initiation of an E-Date may result via a personal posting, a chat room conversation, an email, some other computer-mediated-communication, or even from offline correspondence.*

E-Dating, however is the process itself: specifically we term E-Dating as:

*the process of contact, courtship, and subsequent emotional, psychological, or spiritual bonding/ exchange at any level between persons via a singles, matchmaking, or online dating website/chatroom.*

With these working constructs defined, we are able to systematically explore these emerging phenomena.

## THEORETICAL RATIONAL

Previous studies have considered dating with economic principles and theory. American dating, mating, and courtship are market exchanges; however, daters ritualistically exchange and gifts and spend money as a focal symbolic vehicle (Belk and Coon 1991). Such represents a primary *social* exchange, and the basis for the theoretical consideration. Dating is based on exchange. Yet, viewing dating as an exchange “may threaten to commoditize and destroy the illusions provided by the romantic model of love.” (Belk and Coon 1991 p521) The notion of exchange also underplays the irrational or unselfconscious ideas that may move daters. The Social Exchange Theory (SET), assumes that acts of are choices of rational selves, and that each E-Dater has the ability and willingness to choose the optimal option. Yet, E-Dating interactions often do not offer both members in an exchange a concurrent, mutually optimal outcome. A potential for one E-Dater’s gain may result in another’s expense. Such exemplifies a "bilaterally discordant" human dilemma of choice (Thibaut and Kelley 1959), and E-Dating often forces choices to be made.

SET further assumes the individual (E-dater) may accurately anticipate the payoffs of different decisions (Thibaut and Kelley 1959). However, daters often do not yet know what they are looking for in a dating partner, are not looking for a commitment (e.g., just to chat), or interactions may cause “instant attraction”. For example, one may not desire to date someone with pale skin, under 5’7”, or with black hair; yet, combinations of the aforementioned traits may be desirable. Further precautions include that by assuming that E-Daters are rational consumers, any social/interpersonal aspects of dating as a social institution are minimized. With these theoretical underpinnings in mind, we now analyze the emergence of E-Dating with group interviews.

## METHODS

We utilize multiple methods to explore the online dating phenomenon. We describe meanings of dating experiences to reduce experiences to central meanings and motivations. Such multiple data sources, methods, and theoretical schemes ensure triangulation is achieved to provide corroborating evidence (Lincoln and Guba 1985). We aim to and conduct research with a broad perspective and suspension of personal preconceptions. Hence, we aim to capture the “essence of the experience” (Moustakas 1994) for online daters.

### **Questionnaires**

To explore the definition and user perceptions of E-Dating, we gave a questionnaire to all focus group informants, prior to any moderated discussion. The three questions on the

questionnaire asked about security, the definition of E-Dating, and e-mail. Importantly, we provided a place for informants to write any feelings or comments they do not have a chance to say, or prefer not to share the experience with the whole group and the camera.

### **Focus Group Interviews (FGI)**

We formed temporary “small communities” in aims of collaborating a discovery regarding dating perceptions and practices. We chose this method, as focus groups are “less structured and free-flowing” (Zinkmund 1985) and account for the social nature of dating. There were two rounds of interviewing, with over a year elapsing between the rounds. The benefit to conducting interviews over a time span of more than twenty months has enabled the researcher adequate time to reflect upon the outcomes of the exploratory group and to denote changes in the advancement of Internet-dating acceptance and usability.

### **Depth Interviews**

Furthermore, the authors have conducted twenty-seven in-depth interviews with E-Daters of various demographics and locations. These interviews have been recorded and partially transcribed for continuing study at a more personal level. Thus, the findings of the current study are based on the questionnaires, preliminary depth interviews, and three sessions of focus groups.

## Recruitment and Sampling

Via criterion sampling, we found individuals with Internet dating experience. We recruited singles that have tried (posted to or responded to) Internet dating services, primarily with classified advertisements in the *Athens Banner Herald*. Simultaneously, we drew upon other sources for round recruitment: a list of past study informants on a related topic (chat), and a marketing listserv. Potential informants were sent a screener to ensure Internet dating experience. We told of the study's general nature, yet not the exact study purpose, to suspend bias. We gave \$30 per informant for their time and insights; payment was arranged through the *University of Georgia's* marketing department.

Round B informants were recruited via a "snowballing" technique, which utilized fliers posted in the downtown area and on campus. Round B informants were compensated in one of two ways: (1) with extra credit in an undergraduate business course, or (2) community service hours. Interestingly, the researcher notes a paid advertisement or monetary incentive was no longer required to find individuals willing to share their E-Dating experience. Thus, before the second series of research begins, we found more individuals willing to talk about E-Dating experiences.

## Informants

In round A, we received 15 responses from the recruitment, and 13 qualified. An email invitation was sent to qualifiers; from 13 invitations, eleven participated. Round A consisted of 3M and 8F, each at least a part-time undergraduate or graduate student

(although this was not a requirement) in various majors. To facilitate comparison, round B targeted informants with similar demographics to the previous round. Round B comprised of university and non-university students alike, 5M and 7F, although sixteen informants signed up to participate. In total (n=23), 82% of the sample was made up of university students, who ranged in age from 18 to 32 (average age 22). This was not ample to compare the sample of daters in college, to daters outside the college environment. This likely results for holding the study in a college town.

### **FGI Procedure**

We held round A during April 2001 in a focus group lab with audio/visual equipment. An email account was set up for communication purposes between the researchers and informants (gradyresearch@yahoo.com). Informants signed a consent form and a payment/reward form. We provided an outside moderator with an explained guide to outline key issues, terms, and points of interest of discussion. These questions were open ended, as to reduce bias in wording. The researchers utilized two video cameras and audiotapes to denote body language, in addition to responses. During the session, one researcher remained at the table, while others remained behind a two-way mirror (two taking notes and one monitoring the cameras and equipment). The total time for round A, including a refreshment break, was 2 hours and 15 minutes. The second series of focus groups were conducted significantly later, on December 4 and 6<sup>th</sup>, 2002. The first day was postponed due to ice storms, yet two informants showed up and gave in-depth interviews, each approximately 60 minutes in length. Thus, the following round

comprised of two sessions, held in the same manner with the same moderator's guide as in 2001.

### **Data Analysis and Coding**

Researchers extensively watched the videos for body language, reviewed field notes, listened to tapes, and classified questionnaire items. We related and classified the responses according to 1) popular issues, 2) research objectives, 3) source, 4) patterns, and 5) themes. We utilized a constant comparative method and member checks. Introspectively, the researchers' own experiences were bracketed in the data collection to include reflexivity to the study.

Via open coding, researchers classified the data into categories, according to common words (e.g., comfort) or phrases (e.g., "dating is scary"). We then refined and differentiated the emerging categories. After revisions/re-groupings, subcategories (e.g., long-distance dating), and their depth and breadth were formed. At this point, we were able to elaborate on how each category and subcategory relates. Finally, we formulated scheme on a deeper level. Here, we identified each code, category, and the relationships among each. We viewed the data in terms of a central phenomenon and rechecked interpretation against the data until we reached saturation.

### **Validity**

The researchers individually reflected upon the meaning of the E-Dating experience within, to establish intersubjective validity. Such understanding is a "back and forth social



interaction” to “establish the truth of things” (Moustakas 1994). This study maintains construct validity via the recognition of existing constructs. The researchers did not impose a theory or construct to the informants. Face validity is maintained, as the informants words are taken “as said” to recognize the informant’s true experience. Catalytic validity is obtained, as each informant is aware of his or her own reality and transformed his or her reality directly to the researcher(s). While maintaining internal validity among the college-aged students in a large southeastern university who have experienced the phenomenon, external validity cannot be claimed for all segments of American daters.

## FINDINGS

### **The Rare Admittance**

Recall, all informants responded to the recruitment as having online dating experience. Yet, in the group setting, informants claimed to use the Internet is a tool to establish off-line “friends”. In the group setting, not many actually admitted to E-Dating to find a romantic partner. However, informants are extremely knowledgeable about “instances” or E-Dates by their “friends, neighbors, and even relatives”. Perhaps this is a strategy to discuss the phenomenon in front of others. Our informants use E-Dating sites and services to establish friendships, or just someone to communicate with infrequently. This notion seemed to be easier to discuss. Four informants from group A, each used the Internet as a direct tool to establish a new relationship. Informant (A2, M) said he utilized

an “online matchmaking service”, in an attempt to meet new people—not necessarily romantic, when he first moved to a new city.

However informants did speak of using the sites to find romance. Interestingly, males dominated in sharing personal E-Dating experiences, in almost a brag-like manner. Informant (A3, M) used such a site to seek romance. He “met” a woman in a chat room after seeing a woman on an Internet dating site. This woman lived in Tennessee, although he lives in Georgia. The two had not previously met, however he made the trip to Tennessee to see her (now offline) twice.

### **E-Dating Advances Friendships**

Informants noted, that, yes, the Internet does often keep a pre-established friendly relationship intact via CMC. Where relationships in person necessitate some physical proximity some of the time, relationships formed online are entered into with the understanding of the limited potential for physical contact. CMC contributes towards making a friend into more.

I would say that ICQ'ing during class and emails back and forth are probably as much as what created us going beyond friends, as time we spent together, even though we saw each other every day it was the late night humor emails and ICQ's during class...that definitely created the flirtation. (A7, M)

## It's a Small, Small World

Informant (A7, M) met a woman in a dating site. In this site, he came across a woman who intrigued him with common interests, goals, and career aspirations. After initial contact and chatting, he discovered she was his coworker in a Texas-based satellite office. They then moved their chatting sessions from the dating site to their company's Intranet. Their online encounters lead to a three-week romantic involvement. The informant, from the Atlanta office, told of his "business trips", which he took three weeks in a row. Such "E-affairs" may be especially of interest to managers who supervise "business related travel", as employees often use the Internet (or Intranet) for more than job-related tasks. We see such work-based Internet tasks range from, "paying an occasional cable bill", to facilitating/carrying out a romantic relationship. In the instance of (A7, M), his company Intranet gained a personal use--which is ironic, as a primary goal of company Intranets is to maintain focus on work-related communication. We see that E-Dating is a tool, even on a regulated network such as a company's Intranet, to seek an offline romance.

*Facilitating offline encounters.* In both E-Dates and O-Dates, informants seek pleasure and affirmation. The way in which they find and merit these goals is different offline than offline. In the exploratory group, six informants said they used the Internet to facilitate off-line relationships (A-2M, 3M, 6F, 7M, 9F, and 11F). These informants used a dating site to maintain ties with people whom they had *first* met in real life. These instances consisted of romantic, platonic, and family relationships. For instance,

informant (A9, F) met a man she developed romantic feelings for while studying abroad in Israel. Upon returning to the U.S., the international couple kept in touch through online means. CMC was the choice of keeping in touch, as international calls are expensive and the time zone differences became an issue.

The second round of informants, however, expressed a new theme. The finding here, is that they are *creating* meaningful personal relationships online (chat rooms, email). The dating sites serve more so to introduce than to rekindle prior relationships. Over a year prior, in the first study, the Internet primarily maintained such relationships. Further, many Internet users who maintain relationships on dating sites, have found methods of supplementing their contact through phone calls or meetings in person. Relationships that may not have formed face-to-face (due to geographical distance or isolation or personal qualities such as shyness), blossom on the E-Dating sites and chat rooms.

### **The Electronic Edge**

Informants say the Internet provides an extra edge, by serving as a confidence-builder for creating romantic relationships. E-Dating sites may give some individuals that extra edge of confidence to facilitate a date. She met a man online halfway across the country and two months later, they moved in together. "I was scared out of my mind...but I was enough of a hopeless romantic to do it." (A6, F) She felt the Internet aided her decision to "go for it".

## **E-Dating Geographical Barrier**

E-Dating is best for finding singles living in or near the same city. Post-modernists, beware, the Internet brings daters together from local communities much more frequently than any other search option. Informants numerously claim that one of the attributes of the Internet is that it “reduces geographic boundaries in both relationship formation and maintenance” (A9, F), but we do not see this in their actions. While it is possible to meet another across distant geographic boundaries on line instantaneously E-Dating, informants rarely spoke of such experiences in a positive note.

Behold the instance of “the cross-country E-Date”. Resulting from solely online encounters, (A6, F) moved from North Carolina across the country (to South Dakota) for an attempted romantic relationship. This move came after only two months of online collaboration. Not only did she go for a short visit, but also she came with all belongings and intentions of moving in. She did just that. Researchers note here, that the informant was the sole motivation for the man’s move, as there was no career or familial persuasions for the move. The informant did not consider this a risk. When probed about the risk of such a drastic move, she replied, “I’ve been talking to him online- he is not a complete stranger”. She was back in North Carolina after just five weeks of living with this “non-stranger”. Most other informants expressed some sense of the risk factor involved with bringing an E-Dater to the offline encounter.

*Sacred Space.* There is a sacredness of being in the home, and in relationships created from the home. Just as the Internet the capacity for communication to cross barriers of time, space is a barrier that is deconstructed as well. (E-Dating) “is good for nights you don’t want to go out, but want some sort of social interaction.” (B5, F) The E-Dater resides in the presence of their own home complete with material and familiar comforts. Wireless capabilities are making Internet dating available wherever a wireless enabled laptop can pick up a router’s signal.

### **Death of Dating Etiquette**

E-Dating does not necessarily follow pre-existing courtship principles or dating patterns of earlier eras. That is, a new form of netiquette is emerging to guide the new generation of E-Daters. E-Dating offerings manifest in the form of product, service, image, communication channels, utilities, and price advantages. These offers to the single are manifestations of support activities (e.g., matchmaking), direct activities (e.g., personal page), or a combination of both. The most empirical form of Internet dating is that of the “E-Dating service”, as there are hundreds of Internet dating sites (and thousands that claim to be so innocent).

### **Time Wasted, Time Saved**

*Time Constraints.* Time is a constraint in dating. All of the focus group informants mentioned that there were severe time constraints in their lives, stemming from both school and other extra-curricular activities. For the purposes of this study, informants A-2, 7 and 10 provided the best examples of how the Internet has saved them time with off-

line relationships. Informant (A2, M) used an Internet dating service to meet people when he first came to Athens. He claims the Internet as a mainstay of his current relationship, since both he and his girlfriend are graduate students and consequently have little time. Similarly, due to her “time constraints in life”, (A10, F) primarily uses the Internet to maintain relationships.

The Internet as a technology has the capacity for communication to cross barriers of time. Internet speeds themselves are increasing, as are the number of American homes with high-speed DSL connections. Along with real-time analysis of Internet daters, high-speed connections provide daters with “sophisticated and speedy matching services”. Because of the fast-paced, on-the-go lifestyle and the emphasis on career establishment in the U.S., the Internet is suddenly being used as a tool to date. As one informant shares, “there is little time available after work. “I don’t want to go out to meet people; I interact with people all day. I don’t have time to do both.” (B6, M). Without time to go to social events, gatherings, and the traditional places to meet mates, informants seem strapped for time to meet someone. A collaborative virtual environment saves all parties involved time- no need to wait for a reply of a phone call or even e-mail. Internet dating is on “real-time”.

*E-Dating Screener.* Furthermore, the robust scalability and data archiving of personal pages, allows a more time-efficient E-Dating experience. Even to one who does not “take the time” to join a specified E-Dating site (e.g., match.com), common ISPs (e.g., CompuServe, Mindspring, AOL, MSN) provide personals for the busy individual. Such

allows one “to screen” thousands, in the time it would take to interact with a mere few...if any...at a social gathering or event.”

### **Prevalent E-Dater Role**

In dating, we see that categories and roles of the dater often overlap. An E-Dater may hold various life roles; an E-Dater may hold the role of a single mother, sports-enthusiast, and an entrepreneur. The roles determine the saliency of categories. It is the saliency of being an E-Dater; however, that is most prevalent. The E-Dater has chosen to engage in the behavior of utilizing the Internet to seek a potential romantic relationship. No matter what one has accomplished, achieved, or obtained in life (career or otherwise), the mere fact that one is an E-Dater is likely to stick out to others. Perhaps E-Dating is not at the point of social acceptance where it is commonplace, and the fact that one is an E-Dater is the category of salience. The salient category influences the dater's expectations and inferences regarding behavior (Folkes and Kiesler 1991).

*Intimacy.* The value of the offline interaction asserts that interpersonal relationships are changing with Internet communication. Studies of online relationships (face-to-face vs. modern technology) “have come to influence the nature of relating to another person in terms of a romantic relationship” (Merkle and Richardson 2000 p187). Consumers are more likely to seek gratification from face-to-face communication than the Internet (Flaherty et al. 1998). Much gratification in relationships comes from intimacy. Our informants agree, “I like the intimacy of the whole person, not a cold screen” (B7, M).



*Self –Disclosure and Community.* Regarding self-disclosure, we have found informants tend to be more candid more rapidly with those they have just met on E-Dating sites, than with others they have just met in person. Namely, such candid disclosure seems to occur most with E-Dating in one's community (e.g., geographical, interest-based, racial, religious). Likewise, the amount of time spent building a sense of trust with co-members of one's community is shorter than the time taken to formulate trust with an E-Dater outside of your community-- especially if the chance of having the two communities cross is slim or multiple communities are shared (e.g., finding another German Harley-Davidson member online). "We had a lot in common, so I didn't waste time explaining about my background; I could quickly tell he understood" (B8, F). Similarly, anonymity creates an opportunity for self-revelation that may not be present in the context of the traditional O-Date.

*Looks May Be Deceiving.* Without a photo, the aspect of attractiveness is "out of the picture", and all attention is on what is written in the personal. Hence, an E-Dater's personality may show through, without getting overpowered by looks. The cues used in life such as body language, dress, personal hygiene, or tone of voice are stigma in which one may judge the truth of statements. This ability is lost in E-Dating. Yet, many deceptions occur with photos. A submitted photo may be outdated, doctored up, or of someone else altogether. Most commonly, the photo posted is from afar or just a "very good picture". "I didn't recognize her from the photo she sent me. When I met her, she had really bad skin" (B3, M).

*Lies, Lies, Lies.* Lies are often more prevalent during E-Dating than with traditional dating. Women informants reluctantly shared that they have lied about their weight and their age. One 20 year-old informant (B1, F) told a man she met on kiss.com that she was 21. Her rationale was to be “included in the drinking scene” on potential future O-Dates. On the other hand, men reportedly lied about their income, athletic condition, and relationship status. Some male informants lie for the entertainment value of it. One informant shared how he occasionally gets together with friends, and they go online to pretend they are interested in “ugly chicks”; they pursue this prank with flattering emails to the girls in a sarcastic yet competitive nature.

### **E-Dating’s Dark Side**

While informants had positive experiences, informants did express negative opinions and experiences about their E-Dating experiences. Namely, the lack of intimacy, negative experiences, potential danger, and risk comprise the “E-Dating’s dark side”. Yet, negative components did not outweigh the benefits of utilizing the Internet to date, as none of the participants spoke of a past experience that has prevented continuation of their online quest.

*Danger in E-Dating.* E-Dating can be dangerous; in a different manner than with traditional dating. When and if one first meets an E-Date offline, it is common to feel as if the other is not a true stranger. “I felt as if I had known him for years, just after a few chat sessions” (A6, F). By chatting, information on favorite sports teams, authors and foods may have been shared. Individuals seem to know many personal facts; however these

“facts” are often not the truth. It is more difficult to treat this person as a stranger, yet it is important to use all the normal precautions.

Traditional blind date precautions may be dangerously set aside. For example, informant (A6, F) trusted that the men she met on dating sites were sincere, stable, and single. Yet, she stated that several people she had dated online were either abusive or in committed relationships. Interestingly, her offline dates did not cease after one bad experience-even with physical abuse. She chalks these negative dates experiences as “very fruitful and positive learning experiences”.

## **Risky Business**

There are always risks in dating, especially via blind dates, first dates or now E-Dates. The risks in dating today in the twenty-first century far exceed the risks in recent history. An overwhelming concern in sexually transmitted diseases in today’s world leaves much to be concerned about in establishing a relationship with someone whose sexual past or reputation is unknown. The *World Health Organization (WHO)* notes the AIDS epidemic is the “most virulent and horrifying plague of our time” (*WHO*, 2003).

*Unknown Audience.* There is an aspect of social risk involved in E-Dating, which we find is tied with the notion of E-Dating’s unknown audience. While some CMC has a known audience (e.g., e-mail), Internet dating site subscriptions involve posting information or graphics to an unknown audience (e.g., personal advertisements). A social risk, posting or responding to a personal, is incurred. While E-Dating may allow one to interact with more individuals or go on more ODates in a “socially ascending” manner, E-

Dating may tarnish one's reputation. One informant (B11, F) felt E-Dating is socially risky, said, "Anytime I type personal information, there is no telling where it may end up. My picture as well, may end up on someone's desktop or even printed and framed on their bedside table." This thought is disturbing to her, and is risky according to other informants, as giving personal information and photographs on a personal advertisement is, in essence, giving this information to strangers. Identity stealing, as well, is a concern according to many informants.

*Security Risk.* Security is an issue in online relationships: "I'm very much aware of the temptation many have to use their networking skills to look at online transactions and information that they are not privy to" (B4, M). Another informant told us in regards to Internet dating sites, "I absolutely am concerned about security. I am a computer tech and know all holes in systems. I only conduct transactions with 128 bit- encryption and NEVER with my social security number" (B3, M). Most respondents even are hesitant to give their general e-mail address out and only use the E-Dating site address. One informant noted he has two real e-mail addresses and one fake "spam account".

## CONCLUSION

### **Theoretical and Societal Implications**

Research on a new phenomenon (e.g., E-Dating) incorporates the notion of exchange on the social, economic, and personal level in a new light. According to social exchange theory, exchange is a stimulus, which benefits both daters and their decisions.

In our research, the informants seem to echo these sentiments, and find a romantic exchange as integral to their balance. Each informant was able to make choices in E-Dating; however, the anonymous nature of the Internet provides that such choices may not be based on accurate facts. Hence, the notion of exchange in E-Dating is significantly different than a traditional dating exchange.

*Dating Consumption.* American consumption, like dating, no longer solely takes place in the “physical marketplace”. While it is a challenge to define the impact of Internet dating in the domestic and the global economy, the baseline and trend estimates may aid marketers in understanding what Internet dating sites are doing to the economy, namely e-commerce. E-commerce is “any transaction completed over a computer mediated network that involves the transfer of ownership or rights to use goods or services” (U.S. Census Bureau 1999). Internet-dating sites with a subscription fee, then, are a part of e-commerce as they give rights to use the service of “increasing the dating pool”. As e-commerce increases steadily (from 0.7% in 4Q 1999 to 1.2% in 4Q 2001), the amount of individuals “hit with the pop-up ads” will likely increase as well. E-commerce estimates suggest the industry will bring in \$103.3 billion in adjusted revenue by 2006 (U.S. Department of Commerce 2002).

*Technology Adoption.* An immature technological introduction may be seen as a problem in the New Economy. Often, while engineers and marketers think a particular technology is terrific, they may fail to consider its value from the customers’ perspectives. This is a problematic onset for technology-based service ventures, such as Internet dating

providers. Why are new technologies not adopted? It is said that new technologies (here, Internet based applications of traditional offline rituals) are more quickly adopted when potential customers perceive them to be: 1) better than what they used before; 2) compatible in all senses of the word; 3) easy to use; 4) easy to try out; and 5) easy to see the benefits (Bellenger, Bernhardt, and Goldstucker 1976). Bellenger et al. note that if even one of these requirements is not met, the technology firm may have trouble getting its product adopted.

Yet, although easy, the application may not be initially acceptable to a society. Social patterns are vulnerable to change right along with technological adaptations (Krugman 1985). This is especially important at a time where the Internet plays a significant role in the lives of some individuals and determines their social patterns. While our goal is not to reveal the adaptation of a new technology (e.g., Internet dating), our study seeks to measure a current “snapshot” perception of online dating according to single, college students as an emerging phenomenon of interest to marketers.

### **Limitations & Further Research**

This exploratory study has generated an array of components of and themes behind E-Dating. While the Internet has been around for over thirty years, it has only become a common tool for communication approximately in the last seven, and dating in the last five years. Therefore, this study remains a pilot for further research. Here, researchers understood the daters’ way of being in a “lived situation”.

This study lacks age and gender diversity, as the average informant was a female in the 18-30 year-old age range. Internet dating from the perspective of the older, perhaps divorced, Internet dater may present different takes on the themes and motivations to E-Date. Thus, segmenting E-Daters by age, occupation, motivations, hobbies/interest, and geography, among other segments is an area suited for future scholarly research. Ongoing and future in-depth interviews with the focus group informant, among others, will compare what is said in a focus group versus solely to a researcher. Other drawbacks include the gender makeup (less than thirty percent male). Perhaps there are differing understandings of Internet dating between men and women, which we likewise consider as a future research inquiry

Our construction of definitions (e.g., E-Date, netiquette) aid in understanding a new phenomenon. The Internet as a means of finding potential suitors (and playmates) is on the rise, and this research is essential in order to determine “etiquette versus netiquette” norms. Netiquette has yet to be widely understood in academic research. Socially speaking, the more research conducted on this topic will lead to an even further increase in the acceptability of meeting suitors online. One may consider E-Dating as a primary influencer of social change in offline dating rituals (e.g., the male initiates contact). Further research should seek to discover the degree of intimacy E-Daters allow online, and how online relationships progress off-line due to the virtual introduction.

In our following studies, the more intimate in depth interview has been selected the method to generate the appropriate comfort level with disclosing past E-Dating

experiences. The researchers are in process of in-depth interviewing, and thus far, 27 have been conducted and transcribed. Finally, extended case studies (1M and 1F) are underway, which seek to explain the complete process of Internet dating, from subscription, to posting a personal, to online contact, to an offline date. Together, each method is one “viewpoint” of the story of dating for college-aged singles in the E-environment.



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CHAPTER 3

A HOLIDAY LOVED AND LOATHED: A CONSUMER PERSPECTIVE OF  
VALENTINE'S DAY<sup>2</sup>

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## ABSTRACT

Valentine's Day is a day associated with lavish consumption, rituals, expectations, and commercialism. Much of the romance is displayed with store-bought and marketing-driven exchanges, contrary to the unique personalized and intimate nature sometimes associated with Valentine's Day. The objective of our multi-method study is to provide insight into Valentine's rituals, themes, and meanings (as expressed in the U.S.) as a basis for understanding consumer behavior for this holiday. Our three research questions focus on: a) behaviors and rituals (both in-store and in the private spheres), b) key consumer meanings and emergent themes, and c) roles of marketing communications during this holiday.

We identify many consumer behaviors associated with Valentine's Day (Table 3.2). In turn, we categorize these behaviors into the areas of: gift exchange, Valentine (card) exchange, affection, food and drink preparation and consumption, and grooming/clothing. Many of these behaviors revolve around intimacy and sexuality. Other meanings associated with these behaviors include: "dealing with disappointment", "obligation", "mutual expectations", "spending patterns", "altruism", "self-gifts", "belongingness", "spirituality", "public displays of affection", and "negative feelings" (see Table 3.3).

Specific gender roles emerge in our findings. For some examples, we find that males in a new relationship often feel obligated to make large or significant purchases for this holiday. Males are inclined to use gifts as a form of nonverbal communication, whereas females engage in self-gift behaviors, especially in relation to grooming rituals. Members

of both sexes do discuss themes of belongingness and romance in a non-materialistic manner; however, such themes are not devoid of marketed products and services.

We find that this holiday is associated with extremes (e.g., consumers either love it or hate it). Furthermore, we find that commercialism and marketing communications contribute to consumer's feelings and experiences concerning their love or hate for this day. While some welcome this holiday, there is a strain of anti-consumerism or anti-commercialism associated with the holiday "for love."

## INTRODUCTION

Valentine's Day and the surrounding season is a time for rituals and romance in the U.S. This holiday is worthy of study due to the unique consumption, gift/card exchange, grooming, dating, and romance-based consumer behaviors associated with this holiday. Some of these Valentine's-related behaviors are ritualized to an extent. In a general sense, rituals organize life and give it meaning. Ritualized behaviors are important to study as they may propose consumer behavior principles, which in turn lend marketers to product and service positioning opportunities (Arnould, Price, and Zinkhan 2004, p. 93). Consumer rituals for this holiday are especially enacted by individuals in romantic relationships. Valentine's Day is generally known as the day for celebrating romantic relationships; yet, this day also celebrates other non-romantic relationships as well (e.g., familial, friendly).

For any type of relationship, however, this holiday celebrates commercialism and spending. This socially constructed, mass-marketed day and surrounding season is the stimulus for many consumers to purchase romantic goods (e.g., roses, chocolate, jewelry) and services (e.g., massage certificates, vacations) for both themselves and for their significant other. Furthermore, this holiday entices many to exchange "Valentines" or similar greeting cards for romantic partner(s), friends, and family members. In fact, over one-billion dollars worth of Valentine's Day cards sell annually in the U.S.

It is not to say that all consumers look forward to or even like this day of romance and rituals. For some, Valentine's Day serves as a somewhat unwelcome reminder of

their “single status”. For others, it is a time when society suggests that money should be spent as an indicator of affection. In fact, this holiday can be a source of obligation, self-loathing, and/or disgust for various segments of the population. Such sentiments entail their own distinct rituals for this holiday (e.g., singles nights at clubs; self-gifts).

We believe that it is important to understand this commercial holiday from a consumer perspective. We focus on three research questions:

***RQ1: What are the consumer behaviors and rituals associated with Valentine’s Day?***

***RQ2: What are some key consumer meanings and emergent themes associated with the holiday?***

***RQ3: What roles do marketing communications play in shaping the holiday?***

We address these questions via multiple methods of data collection, including: a) consumer diaries, b) online postings, c) surveys, d) group interviews, and e) in-store observations.

The following section reviews relevant social science research on rituals and gift exchange. Next, we describe our methods of data collection. We then report and discuss the findings.



## LITERATURE REVIEW

### **Rituals and Valentine's Day**

Rituals are sets of multiple, symbolic behaviors that: a) occur in a fixed sequence, and b) tend to be repeated periodically (Solomon 2002). We analyze the holiday further as it pertains to a variety of classifications of rituals. Valentines Day is a holiday that is associated with a variety of cultural rituals. Cultural rituals are behaviors that occur in a relatively fixed sequence that are repeated periodically (Arnould, Price, and Zinkhan 2004). Other types of rituals that may be associated with this holiday are religious, magical, aesthetic, calenderical, and rites of passage (Arnould, Price, and Zinkhan 2004).

Such rituals may be further categorized as primarily personal rituals, ethological rituals, or consumer rituals. Personal rituals are those repeated behaviors that are performed via an individual's emotions and desires. Ethological (e.g., greeting, mating) rituals, however, are a component of biology (Rook 1985). Consumer rituals include possession, grooming, divestment, and exchange. Possession rituals occur when a product moves from the market to the place of consumption (e.g., home, workplace). Grooming rituals are often private behaviors that assist with transforming the private self to the public self and vice versa. Possession rituals may be grooming rituals, in the event that the individual is cleaning, polishing, or restoring the self or the extended self. Divestment rituals are performed as an individual dispossesses something (e.g., a grandmother's wedding ring). Exchange rituals (e.g., rites of passage) are often associated with gift giving and receiving. We note that rituals exist in cycles, which may be global consumption rituals (Rook 1985; Arnould et al. 2004). In any sense, rituals,

often retail and market driven, organize life and give it meaning or purpose and may be apparent in various Valentine's-related behaviors.

### **Gift Giving and Exchange**

A substantial portion of academic literature associated with Valentine's Day is devoted to the study of gift exchange (generally gift giving). For instance, the French anthropologist Marcel Mauss concludes that reciprocity motivates gift giving (1925). Since that time, pioneering insights have been added to that observation. Sherry (1983) combines anthropology (a social aspect) and consumer research (a psychological aspect), to create a macro-model of the gift exchange process. He recommends that the "reformulation" stage (the final stage of the gift giving process) should be studied thoroughly, as knowledge in this area is crucial to understanding the socio-psychological dynamics of gift giving (Sherry Jr. 1983, p.165). We consider these dynamics as important for understanding Valentine's gift exchange and related rituals.

Goodwin, Swift, and Spiggle (1990) also examine motivations associated with gift-giving. They propose that gift giving is a product of either voluntary or obligatory motives; time, money restraint, and many consumer behaviors are affected by these motives. Belk and Coon (1991; 1993) explain how such motivations have traditionally been viewed from either an economic or a social model of exchange—inappropriate for romantic gift exchange.

Belk and Coon (1993) confirm that more emphasis should be placed on a modernized representation, such as the Model of Agapic Love. This model focuses on gift giving from a pure, unselfish, and altruistic viewpoint. Such a love-oriented model

applies to a study by Huang and Yu (2000). Huang and Yu (2000) focus on a survival analysis for gift giving in a romantic relationship. They claim that links exist between gift consumption amongst partners and the length of the romantic relationship. Their findings apply to gift exchange for Valentine's Day; however, their study is not specific to the holiday, as are the following studies.

Netemeyer, Andrews and Durvasula (1993) contribute a study entirely focused on Valentine's gift giving. They show how three behavioral intention models may be applied to both planned and voluntary behavior. Otnes, Ruth, and Milbourne (1994) study attitudes toward Valentine's gift exchange from the *male* perspective. They find that males have motives with respect to: purpose, gift/card giving, and the reasoning behind *why* males choose to engage in or opt out of the gift giving. Polonsky, Neal, Rugimbana, King, Bowd, and Porter (2000) follow the Otnes et al. (1994) study, and confirm the themes of obligation, self-interest, and altruism. In contrast, Polonsky et al. find that either obligation or self-interest is always present.

Few prior studies focus on non-gift rituals associated with this Valentine's Day. Thus, one of our research questions focuses on exploring a more comprehensive account of consumer behaviors for this holiday. We will now discuss the methods we used to address the research questions.

## METHODS

Table 3.1 summarizes our methods and informants, sample sizes, timeframe, and relevant details.

**Table 3.1: Methods**

<b>Method</b>	<b>Informants</b>	<b>Time</b>	<b>Details</b>
<b>Consumer Diaries (n=88)</b>	Undergraduate Students Males and Females Ages 18-47; Mode Age=23 Any relationship status	2002-2004	Entries focused on the: a) cultural rituals, b) male roles, c) female roles, d) enjoyment factor, and e) comparison to other holidays.
<b>Online Diaries/ Postings (n=22)</b>	Anonymous posters to online diaries & message boards Males and Females All ages Any relationship status	2000-2004	Sources include: diaryland.com, opendiary.com, my-diary.org, pfft.com, diarist.net, mydeardiary.com, marketing science message board, various personal websites
<b>Survey (n=64)</b>	College students Males and Females Age 18-22 Currently in a romantic relationship	2003	Conducted on Valentine's Day
<b>Focus Group Interviews (n=6)</b>	College students Females Age 18-22 Currently in a romantic relationship	2003	Moderator's guide covered: rituals, meanings behind the holiday, traditions, reasons, and self-gift giving
<b>In-Store Observations (n=41)</b>	Customers at floral department and associated holiday retailers Males and Females All ages Any relationship status	2003-2005	Conducted on the week of and on Valentine's Days; field notes taken Conducted in the southeast and southwest

### **Method I: Diaries**

Eighty-eight consumers kept diaries related to their thoughts and behaviors concerning the holiday. The age of diary authors ranged from 18-47, with a mode of 23 years-old. A relatively even distribution of males and females in various relationship statuses completed entries. Diary entries focused on the holiday's: a) cultural rituals, b) male roles, c) female roles, d) enjoyment factor, and e) comparison to other holidays (e.g., meanings,

associated marketing communications). Diary entries provide a personalized data source for this more intimate holiday.

To complement the offline diaries, we analyze online diary entries that have been published on the Internet. Online diary postings are often written under a non-recognizable screen name; such anonymity provides for rich, truthful data concerning individuals' sentiments and experiences with the holiday. While some individuals post with a first name and other information (e.g., age, city of residence), we are not always able to obtain the poster's age or gender.

We used axial, open, and selective coding techniques for data analysis, and grouped similar entries into categories of meaning. Such contributed towards revealing the emergent patterns of each category (Wolcott 1990). The authors reviewed each other's data interpretations until saturation.

## **Method II: Survey**

For a supplementary perspective, we distributed a twelve-item exploratory survey on Valentine's Day (2003) to college students. We administered one hundred surveys in order to gather insight from individuals in a romantic relationship. We included a screener question (i.e., Are you currently in a romantic relationship?). If the respondent reported to be in a relationship, they were directed to complete the survey. In total, we analyzed sixty-four surveys (thirty-two for each gender).

Survey items questioned the expectations, behaviors, perceptions, and the commercial aspects of this holiday. In addition, respondents indicated their age, gender, and whether they are in a "new relationship" (less than six months) or a more established relationship (six months or more) as suggested by Huang and Yu (2000).

### **Method III: Focus Group Interviews**

Unlike the survey administered to both genders, we designed a focus group for female college students in a relationship, to encourage discussion without males present. We choose to focus on females for group interviews, as this is a more “female holiday” in the U.S. Furthermore, insight on male perspectives has been examined (e.g., Otnes et al. 1994; Polonsky et al. 2000) in extant literature. The focus group participants included six females (three in a new relationship and three in a more established relationship). An outside moderator served as the discussant. Two researchers took field notes during the session. The researchers debriefed the session and constructed overall themes and sub-themes.

### **Method IV: In-Store Observations**

By conducting in-store observations, we witnessed aspects of commercial preparation for Valentine’s Day. The observations and fieldwork took place in floral departments of two large national grocery store chains and other retailers associated with the holiday.

Observations took place at the first location, located in a southeastern city, during the week of and on Valentine’s Day 2003. A second round of observations took place at another grocer in a different town, on Valentine’s Day 2004. A final round of observations took place in a mid-size southwestern city the weekend before Valentine’s Day 2005.

At the outset of our study, we did not intend to focus on one specific kind of human relationship (e.g., heterosexual, homosexual). However, our informants tended to focus on heterosexual relationships or did not specify the type of romantic relationship.

## FINDINGS

**RQ1: WHAT ARE THE CONSUMER BEHAVIORS AND RITUALS ASSOCIATED WITH VALENTINE'S DAY?**

A wide variety of rituals, often retail related, are associated with Valentine's Day. We show five broad interrelated categories and their defining behaviors in Table 2.

**Table 3.1: Valentine's Holiday Consumer Behaviors & Rituals**

<b>Category</b>	<b>Specific Behaviors &amp; Rituals Mentioned by Informants</b>
Exchange of Gifts & Cards	Personalizing/non-conforming gifts, incorporating symbols (e.g., cupid, heart), decorating rooms/vehicles, incorporating senses, lighting candles, sharing chocolate anything, surprising loved ones with gifts or meaningful gestures, giving shiny or scented gifts, e-gift giving, preparing a special gift basket, giving specific items: red roses, flowers, concert tickets, teddy bear, pearls, diamond jewelry, engagement ring, chick-flicks, romantic movies or television shows lingerie, candy, diet candy, Spa Sydel half-day certificate, framed picture of the couple, car, new house, gifts for pets. Cards: personalizing, cutting out hearts, using artsy/crafty Valentine's, exchanging cheesy store-bought Valentine's, writing poetry, expressing true romantic feelings in a card, sending e-Valentine's, exchanging Valentine's with other singles, sending secret admirer cards, naming the "Hallmark Holiday"
Showing Affection	Sex, kissing, making out, acting sensual, making loved ones feel special, slowing down, building a fire, cuddling on the couch, going on a date, romantic getaways, getting in the mood, love-making, celebrating love, spending time alone, enjoying each other's company, staying in together, avoiding the crowds, emphasizing commitment to one another, renewing vows, proposing, celebrating a romantic anniversary, getting married, snuggling, reading to each other, being grateful for each other, displaying affection, reminding friends and family they are loved, playing a game
Going Out	Nice restaurant, going to the ballet, parties, get-togethers, singles parties, fraternity date nights, hiring a sitter and escaping out, movies, theatre, concert, shopping, carriage rides, clubs, bars, spa getaways, weekend vacations, anti-Valentine's parties, going to virtual spaces: e-dating sites, singles chats, Valentine chat rooms, message boards
Preparing & Consuming Food/Drink	Preparing romantic food, heart-shaped sandwiches, cooking in lieu of fast food, cooking surf-n-turf, aphrodisiacs, drinking expensive wine, drinking champagne, eating candy, candy hearts with messages, eating chocolate, avoiding cheap chocolate, eating alone, eating desserts, avoiding overcrowded restaurants, having candle-light dinners on the back porch, picnics, expensive dinners

Grooming & Clothing	Wearing certain colors (i.e., red, pink) of lingerie and/or clothing, wearing pretty underwear, wearing heels, planning what to wear in advance, buying a new outfit, wearing sexy clothes, wearing a themed tie, putting on a cute outfit, getting dressed up to go meet singles, taking time off to groom, bikini and leg waxing, spending extra time on make-up, tanning, spray-tanning, getting a special hairdo, applying manicures/pedicures in pink or red, actually showering and brushing teeth, applying lotions and glitter, beautifying the entire body, looking better than other females, applying a temporary heart tattoo, wearing extra perfume, working out, shaving chest hair into a heart shape
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In light of our research objectives, we will not discuss the meanings of *each* of these items; however, we focus on those that contribute to addressing our specified research questions.

### Exchanging Gifts and Cards

Gift and card exchange is the most frequently mentioned behavior. One informant describes how she is just a *partial*-conformist to the American norm (Santino 1995, 1996):

Many people in America celebrate Valentine's Day by participating in the same rituals. The most common (gift giving and consumption) rituals are buying your loved one chocolate candy, red roses and wine. I also participate in these typical traditions, but I try and modify them for meaningful reasons. [F, Diary]

This informant, like others, partakes in traditional rituals, yet she maintains a sense of individualism on a day that is otherwise conforming to the consumption and/or exchange of specific products and brands. Valentine's is a day when many *speak of* giving personalized gifts in lieu of the "status quo" gifts of roses, chocolate, stuffed animal, and/or perfume. One way to optimize gift giving is to involve as many senses as possible. One informant describes her gift giving technique:



When I buy my Valentine's Days gifts, I also try to use all five senses. I will purchase some kind of candy for taste, flowers or cologne for smell, a nice dinner with candles so it looks nice, a winter shirt to feel warm in and I like to buy my loved ones a soft sound CD to listen to. [F, Diary]

Personalization is an important element of altruistic gift giving. She continues, as she discusses the importance of considering the preferences and tastes of the recipient:

I always try to put effort in my gift giving and personalize them too. For instance, my mom would prefer flowers and my dad would rather have cologne. So, whoever the person I am shopping for, whether it be my boyfriend, mom or dad I always try to be creative, use all five senses and most importantly show them my love. [F, Diary]

However, it is often more difficult and time intensive to select and purchase personalized gifts on this holiday due to the mass-production of Valentine's-related merchandise online and in on-ground retail locations.

Others view the entire idea of gift giving for this holiday as purely market-driven and store-bought. Many men have learned to "listen to the shelves" and to avoid certain gifts for romantic occasions (e.g., blenders, cleaning supplies). One man takes time to help other gift-givers by specifying what, in his experience, women *do* want for this holiday:

Any way, amigo, if you want her happy always remember: the gift has to shine or smell [good] or she should be able to wear it! Otherwise, you'll be doomed. [M, Posted 2-14-04]

This perspective is in stark contrast to many of the female posts, diaries, and discussions of appropriate gifts to give and to receive. Many females discuss how the gift exchanged should be meaningful to the couple, thoughtful, or unique.

Some males mention that the Internet makes it much easier to give feminine gifts (e.g., lingerie). These males share that they are uncomfortable spending time in a

women's lingerie store, such as Victoria's Secret, aside from feeling that they make the women shoppers uncomfortable. One male reports that he actually enjoys giving lingerie—if it is purchased on the Internet:

Yeah, I enjoy the experience of buying a gift online. It makes it more efficient. Victoria's Secret it is easier to go to online. Call me crazy. It is easier to do it online. [M, Diary]

Some informants also use the Internet to send online greeting cards for this holiday to friends and family members in certain situations. However, others choose to send an e-gift card:

I wouldn't ever buy a card online and send it online (like an E-card), but I would buy a greeting card to have sent along with the gift. But if the gift card was a free E-card, then, yeah (I would send it), that's not a problem. I don't mind even just putting in a little note, five or so words in a message, that comes along with the gift when it is sent. I would even pay a couple dollars extra to make that message longer. [M, Diary]

To this informant, e-cards with gifts are an important part of the gift exchange and even worth paying a premium for; however e-cards should be free. Traditional, paper greeting cards (store-bought and homemade) are discussed as the more common form of card exchange among romantic partners. In general, these gifts and cards are a vehicle of showing affection.

### **Showing Affection**

A key group of behaviors involves showing affection. Informants discuss relaxing with loved ones as a way of sharing affection. Whereas some individuals involve themselves with “holiday hype”, one young woman shares how she likes to slow down with loved ones on this holiday:

Even though Valentine's Day is not necessarily about gift giving I enjoy the holiday every year just for the sole purpose that I get an extra chance during the busy year to let my loved ones know I care and have a nice dinner and celebrate each other's love. My fondest memories of Valentine's Day is every year building a warm fire after dinner and relaxing with each other. [F, Diary]

Kissing, making out, love-making, and sex are other behaviors informants commonly share as a way to show affection to loved one(s) for this holiday. This is one example of "celebrating" the holiday in the private sphere.

For those in and out of romantic relationships, more daring behaviors take place on Valentine's Day. This holiday makes it more appropriate to be direct with affection.

This day is different:

There is a sense of magic, excitement, and romance. [F, Diary]

On this day, some take initiative to rekindle a relationship or connect with someone new:

It can be a day to try to find a loved one. It is a day when a secret admirer might emerge. [M, Diary]

It is the holiday that entices some to come forward with their romantic feelings.

## **Going Out**

Although many celebrate the holiday intimately at home, a common Valentine's-related behavior entails "going out". Many informants discuss going out on dates in the public sphere (e.g., movie theaters, parks, restaurants). Many singles choose to spend the holiday at singles events or with a group of other singles. This is one day where singles seek each other's company:

Singles might sit around in a group, watching movies or feeling sorry for themselves. Or, they might find a way to celebrate the day. [F, Diary]

One informant tells how this is the *one* night he is sure to go out to meet someone, because other singles are out celebrating, while the couples are home together.

### **Preparation and Consuming Food/Drink**

Whereas many consumers go out and celebrate over dinner in a restaurant or café, others celebrate the holiday by preparing and consuming food and drink in the privacy of the home. Some consumers share that romantic dinners at home have the benefits of saving money, avoiding risks from drinking and driving, and have a comfortable and personal atmosphere.

Some of the more commonly exchanged and consumed items for this holiday are sweets and chocolates. Women often receive sweets on this day, and this consumption ritual is based on the assumption that women go weak for sweets (see Barthel 1989; Belk and Costa 1999). Some do not just like chocolate—they LOVE it. Such instances may explain why sweets are a common gift to women on Valentine's Day. As one woman explains:

It's not just candy. I have a fatal weakness for desserts. I love ice cream, cakes, pies, pastries, chocolate, fruit, and most other sweets with a passion. Whenever I go to a moderately nice restaurant, I'm mostly thinking about the dessert I could get at the end of the meal if I'm not too full. At Italian places, I dream of espresso pie and tiramisu, and most restaurants have good cheesecake. If it's homemade and comes in a pool of raspberry or chocolate sauce, I go weak at the knees. [F, Posted 2-14-03]

Such information may be of interest to men, as it appears that this woman would be pleased with gifts of chocolate just as much as expensive jewelry or roses. She is disappointed that her husband does not love sweets. It is not from the dieter's viewpoint (i.e., it is unfair that he goes without sugar cravings), but from the pity-filled perspective that he is truly missing out on one of life's finer things:

It's a little disheartening that my husband doesn't share my love of sweets. He will happily eat ice cream or cheesecake or apple pie, but he doesn't seem to savor it, and really look forward to the next time the same way I do. The power sugar holds over me doesn't hold him. Some people in my situation would envy his self-control and lack of need of candy, but I just pity him, knowing he'll never understand what it's like to be in love with it. [F, Posted 2-14-03]

Just as chocolate and candy are frequently mentioned, red wine and champagne are the beverages many informants associate with the holiday. Wine is even a part of grooming rituals for some individuals on this holiday.

### **Grooming and Clothing**

One grooming behavior of note is the act of “primping and priming”, or taking extra effort to look one's best. In the group interviews, the females discussed how grooming efforts on this day are much different from their everyday rituals. One woman spent hours beautifying herself for her new boyfriend:

I was so nervous getting ready for Valentine's Day when I first met my boyfriend, I literally attempted to calm my nerves by drinking a couple glasses of wine, and then beautified my entire body, from head to toe. [F, New; FGI]

Such a lavish grooming ritual may be more common for young women in new relationships. One woman, in a more established relationship explains that she no longer performs extraordinary grooming rituals:

I love my boyfriend dearly, but I don't think it is necessary to buy a new dress to wear for one night like I would have for the first Valentine's Day that we spent together! We tend to use the money that I would have spent getting my hair and nails done on something that we can both share together, like a really nice dinner. [F, Longer-term; FGI]

Unlike the young woman who shunned the need to buy a dress, another informant was proud of both her recent purchase and the way it complements her “purchased” skin tone:

I bought a new dress, but I had to make sure that it was classy but sexy at the same time. I made sure I had a nice color by going to the tanning bed a couple weeks prior to Valentine's Day. [F, New; FGI]

Such women in new relationships were *especially* eager to share their preparation rituals, and the session transformed into a "competition." Many of the young women spoke at once, trying to surpass one another with their lavish doings. One woman in a new relationship seemed confident of her extra beauty efforts, as he took time out of her school and work schedule to groom:

I had to make sure that I had time to go to the spa to "fix" my body up for Valentine's Day. [F, New; FGI]

Some men may not believe (or desire to acknowledge) the preparation that some females go through; however, informants stated that their partners were extremely pleased with the final "product." Some of the ritualistic behaviors may seem unnecessary; however, these behaviors contribute to these females' individuality. Our informants (women in romantic relationships) do prepare for Valentine's Day in similar ways; however, the females in new relationships discuss going to greater lengths and monetary expenses for their partners.

We now consider the underlying meanings and emergent themes associated with these behaviors.

## **RQ2: WHAT ARE SOME KEY CONSUMER MEANINGS AND EMERGENT THEMES ASSOCIATED WITH THIS HOLIDAY?**

The key meanings and themes we discuss here include: "love, affection and intimacy", "altruism", "mutual expectations", "self-gifts", and "negative feelings". Other themes (e.g., commercialism) are discussed in the section related to our third research question. We

begin with the “positive themes” and then discuss more negative aspects of Valentine’s Day.

### **Love, Affection and Intimacy**

One key meaning of Valentine’s Day is the showing of love, affection, sharing intimacy, and sex. In the public sphere, kisses, hugs, and hand-holding in public are more common on this day; public displays of affection are sightings that many have come to expect on February 14<sup>th</sup>. In the private sphere, this holiday celebrates romantic love and intimacy. For some, it is a time set aside for sex:

It is the holiday to stay in and share intimate times and sex. [F, Diary]

Valentine’s means displays of love, affection, and care. [F, Diary]

Informants often associate the holiday with *all* loved ones (e.g., family, friends, significant-other):

Valentine’s Day is a time for love and affection. I do not know anyone who wants to spend Valentine’s Day alone. I love to spend my Valentine’s Days with the person I am dating or my family. I love buying and giving gifts during this holiday but the most important thing is being with the people I care about and love. [F, Diary]

Family, specifically, is often mentioned as an important part of the holiday. Important family members include parents, siblings, and grandparents. Many phone calls and letters for this holiday are not just for romantic loved ones, but also for such family members.

## **Altruism**

Altruism, or voluntary giving which is not directed at gain, is a key Valentine's Day theme. Motivations for gift giving in a romantic relationship change with time, and altruistic gifts may extend the relationship (Huang and Yu 2000). We find, for instance, that males in a longer-standing relationship have positive feelings for this holiday stemming from altruistic motives and love. Polonsky et al., however, find that "the altruism motive was rarely found to occur independently amongst young males, especially with relationships that have been established for periods longer than six months." (Polonsky et al. 2000, p.1003)

We find a similar phenomenon in responses from women. Women in a longer relationship were more likely to share selfless giving than the women who were involved in a fairly new relationship. Past studies (e.g., Huang and Yu 2000; Polonsky et al. 2000) also found altruism is positively related to relationship length. However, those studies focused on males' gift-giving; our findings extend to women as well. Altruistic motives are apparent with males and females and underlie behavior for this holiday.

## **Mutual Expectations**

Childhood experiences play a large role in shaping adult Valentine's expectations. Early memories of the day evoke images of elementary school and the parties, arts and crafts, candy, time off from schoolwork, and egalitarian exchange of Valentine's cards. Time off from schoolwork is more common on Valentine's Day in public elementary school, because of the secular association with the holiday, as compared to the policies that limit celebrations of religious holidays (e.g., Christmas, Easter) during class time.



Because of such strong, early-rooted influences, consumers build up high expectations for the day. As a result, consumers enter their teenage years with high expectations. Such heightened expectations may lead to disappointment (e.g., by teenage females who expect uninformed young males to shower them with gifts and affection).

These expectations are mutual; over half (53%) of the males and 63% females in our survey expect a gift(s) from their significant other for the holiday. Heightened female expectations might be associated with the fact that women receive more gifts than they give on Valentine's Day (Goodwin et al. 1990). A further explanation may be that women see themselves to be gift-receivers more so than givers on this day. However, males do view the lack of gifts received as a negative factor associated with the holiday (Otnes et al. 1994).

Interestingly, a higher percentage of males and females in a new relationship expect gifts, as compared to those in a more established relationship. As the duration of the relationship increases, both men and women expect fewer gifts from their partners. As both partners may begin to feel comfortable and confident in the relationship, they may not feel the need to impress the other, as with self-gifts.

### **Self-Gifts**

Self-gifts are gifts that are given to oneself to try and appear more attractive in their partners' eyes (Huang and Yu 2000). Examples of "self gifts" include perfume, cosmetics, and lingerie. We find that more of the women in a *new* relationship indulge in self-giving. This could be explained by the negative relation between relationship length and pressure to look "perfect". Valentine's Day is viewed as one of the most romantic

times of year, and women who spend this day with someone special for the first time often go to greater lengths to “prepare themselves”. Females speak of these self-gifts as a way to make themselves “absolutely irresistible” for their partner.

### **Negative Feelings**

Not all informants hold the same warm feelings for the holiday; some consumers “can’t stand this day of love.” Past studies have suggested that men are primarily the ones with “anti-Valentine” feelings; however, there are expressive females speaking out and sharing their distaste for this love-oriented day. One woman turns to chat rooms and message boards when her misery needs company:

I've spent this valentines surfing the net, looking for sites about love sucking! My bou of 4 years broke up about 1 month ago, he is with someone right now...DEATH TO VALENTINES! [F, Posted 02-15-00]

Another young woman encourages others to send hate mail instead of “happy-grams”:

I want to urge everyone to join me in sending hate mail instead of Valentine's on this wonderful day. It makes you feel better. I promise. [F, Posted 02-15-00]

However, another woman shares her suggestion of getting rid of the day completely:

I always used to hate this holiday, and my friends told me I was weird- but now I know I'm not alone! Abolish Valentine's Day! [F, Posted 02-11-00]

Yet, some individuals just have problems in the way society interprets the holiday—or, they do not think it is a holiday at all:

I hate Valentine's Day because all those people in love think that it is a real holiday and it's not...it is a time of the year that everyone who is in love gets stupid and all mushy while the rest of us get left out yet again and we are forgotten about just because we haven't found the one...this sucks...! [M, Posted 02-04-00]

A theme we see often is that informants do not think that love is to be shown on “this day and this day only”. The following men seem to have more of a problem with it being *the* day for showing love:

I hate Valentine's Day, because...I don't know. I think, if you love someone, you don't need a special day to show it. Every day is suitable for this. [M, Posted 02-15-00]

Some of this dislike for the holiday (and what it represents) stems from unfulfilled expectations. Not getting a gift, “the right” gift, or desired attention often leads to disappointment. Self-esteem may fluctuate on Valentine’s Day, as some get a boost or a threat to their self-esteem. We now consider the role of marketing communications on consumer expectations and experiences for this holiday.

### **RQ3: WHAT ROLES DO MARKETING COMMUNICATIONS PLAY IN SHAPING THE HOLIDAY?**

Marketing communications play a role in shaping feelings of materialism on one hand, and togetherness on the other. Marketing communications also contribute to gender roles for this holiday. We begin by discussing some observations of in-store marketing communications practices, and then discuss some roles that various forms of marketing communications play in fostering materialism, togetherness, and gender roles for the Valentine’s holiday.

In-store displays sometimes start appearing months prior to February 14<sup>th</sup>. Our observations in floral departments and retailers that cater to the holiday include: multiple red and pink displays, including balloons, a “Valentine’s Day Gift Center” banner, and extra options for floral and gift-wrap arrangements. Such a promotional arrangement attracts mainly men, who often purchase flowers, a card, chocolates, a balloon, and/or

another small gift all at once. In turn, we see that few females come seeking gifts.

Interestingly, there were no masculine items in the area.

One of the most traditional gifts for this holiday is a dozen red roses. However, some specifically requested something different:

I need a really nice arrangement for my girlfriend-- but rather than roses, can you use tulips instead? [M, Observation]

To further individualize the gift, the saleswoman asked:

Have you two been together for a while, or is this the first time you would be purchasing flowers for her? I need to know so I can pick the right colors for the arrangement. Normally, red symbolizes love... [F, Observation]

He jumped in:

Yes! (pointing to a peach shade) That would be perfect, since my girlfriend prefers softer colors instead. Also, I really don't have a limit on how much the flowers cost. This is the first time I'm buying flowers and I want it to be nice. [M, Observation]

Here, price is a proxy for quality. He was willing to pay for "the best". He described his spending limit as:

As much as it takes to satisfy my girlfriend! [M, Observation]

Another observed customer described how he begins saving months in advance, because he expects a considerable financial burden for this holiday. Marketing efforts also entice women to spend, among other enticements:

Marketing gets me "in the mood", and causes me to buy more stuff than I normally would. For example, I bought Valentine cards for everyone in my family and all of my friends. [F, Diary]

## **Fostering Materialism**

Valentine's Day has a materialistic aspect that is reflected in the multitude of ads, public relations material, in-store displays, and e-communications that remind consumers to purchase something for their loved ones. Recall we found that both women and men expect to receive some sort of gift. Some consumers overtly trace these mutual expectations to marketing communications. Recall that some consumers express negative feelings toward this holiday. Some explicitly attempt to avoid marketers' influences. One way is via the exchange of non-marketed, "hand-made" gifts (e.g., homemade dinners, massages, original song lyrics, homemade cards). However, traditional store-bought goods or services (e.g., restaurant meals, massage certificates, CDs, greeting cards) are mentioned by the majority of informants. Some individuals aspire to share luxurious items and brands (e.g., Tiffany & Co., Godiva) with their loved one, as ad images suggest. However, not all informants associate Valentine's marketing communications with materialism. Instead, they notice the "togetherness" reflected in marketing communications.

## **Fostering Togetherness**

Marketing communications foster a sense of togetherness for some. Images often depict lovers spending time together. One informant recognizes the meaning of showing such images, and how she now appreciates this holiday's meaning:

Having people around to share special occasions leaves a much stronger impact in one's life rather than receiving material things. Every year on Valentine's Day, I have a nice breakfast with my mother and father and then a romantic dinner with the person I am dating... that way I can spend a little time with everyone that I love. [F, Diary]

For some, the shared gifts, food, and drink, are a vehicle of spending quality time and showing affection with loved ones and non-materialistic in nature.

A formal engagement is a symbol of togetherness. Some ads suggest proposing on this day. One male even recalls the advertiser:

Every Valentine's Day this one jeweler, the Shane Company, I think, calls out for men who are in relationships and suggests we come to their store and buy a ring. I don't want some businessman telling me that it is time to propose! [M, Diary]

The Valentine's season is a popular time for advertising engagement rings and wedding goods. To some informants, a diamond ring (and the future marriage that it symbolizes) is the ideal exchange. One informant had a day to remember. She is happy to share her story, as well as glimpses of her solitaire:

We went down to Atlanta on Valentine's Day and checked into the Westin Hotel and went outside for a picnic that my boyfriend had planned. It was raining so we were carrying an umbrella. We went to a horse and buggy, to which I was very surprised, and rode around Atlanta. We got off at Centennial Olympic Park and sat under a pavilion and had a salad, heart-cut sandwiches, fruit, and strawberries dipped in chocolate. After lunch, my boyfriend had a velvet Godiva chocolate box (that I had asking to eat all day!) I finally go to open it, and at this point, I was thinking that he might have put a ring in there, since our day had been so extravagant. I opened it and it (a ring) was not in the box. I got some chocolate and put the box down (disappointedly). [F, Diary]

Her diary continues:

Later, he picked the box (of Godiva chocolate) back up and asked me to see what kind of chocolate was in the center. I opened it and the ring was in there! He asked me to stand, and he got down on one knee... and asked me to marry him! I was crying and, of course, it was one of the most exciting days of my life. [F, Diary]

Upon hearing that her friend received a ring, another female responded with a half-joking tone:

You got a diamond ring—I didn't even get a card. [F, Observation]

Such sentiments are not uncommon—especially from singles on this holiday that reportedly

“discriminates against” single people. To those who have negative Valentines feelings, marketing communications overtly depicting togetherness and engagements are especially irritating.

### **Fostering Gender Roles**

Marketing communications fosters gender roles for this holiday. For example, consumers state how marketing messages suggest, imply, or state that this is a day for females. Informants reference the ads and messages that suggest pampering the female with a gift, card, dinner, and other purchased signs of affection. In turn, a somewhat common female perspective is that it is a day for female attention:

Females are supposed to be pampered and spoiled on this day. [F, Diary]

Some males perceive their gender role as a day to cater to “the ladies”:

Valentine's Day is cool...since I'm a true ladies man 🤔 It is a great day. 🤔 [M, Posted 5-20-04]

Other male roles apparent in marketing communications include buying, buying enough, and finding romantic activities to do. One woman realizes the pressure the hype for this holiday seems to put on some males:

There is so much hype, I think it sucks even for people IN a relationship- what should they do/buy, are doing/buying too much (for women), are they doing/buying enough (enough)? I got married on Valentines day and I remember every man invited was all smiles, because it gave them something "romantic" to do on valentines day with their partners that didn't cost them anything, and took all the pressure of them! Its embarrassing to be a marketer when you see something so commercialized, isn't it? [F, Posted 2-15-2004]

Another female shares her perception of each gender role during this holiday:

The male is the wooer. The female role is to be wooed. [F, Diary]

Although some females are "wooed", other females are anything but wooed.

This is a day for a female to have her heart broken or else have an absolutely wonderful day. [F, Diary]

It is apparent that Valentine's Day is a day of extremes—from euphoria to heartbreak.

## DISCUSSION

On the surface, Valentine's Day is a simple holiday; nonetheless, there are a wide variety of behaviors, rituals, meanings, and commercial efforts associated with this day. Because this holiday is so rich in consumer meaning, we are just scratching the surface in this study. Valentine's Day rituals are constantly evolving. New traditions are added annually (e.g., e-Valentine's, speed dating).

Marketing expenditures and efforts are large, and often begin months before the holiday. Such marketing efforts often target males as potential buyers, and often make explicit suggestions or guidelines to assist them in the gift giving process. Such marketing efforts are a clever strategy, because (young) males are sometimes fertile ground—and confused about what is expected from them with respect to this holiday.



At the same time, we find evidence of consumer revolt. Many consumers go out of their way to avoid “stereotypical” rituals or the mass-commercialism associated with Valentine’s Day. For some, Valentine’s is a season to be reminded of one’s “single status” or a time of self-reflection and evaluation. For some, this holiday can be a source of obligation, self-loathing, and/or disgust. Distinct rituals are enacted for this situation (e.g., singles nights at clubs; gossiping about couples, girls’ night out, self-gifts).

Consistent themes emerge in our research. For instance, we find that males often feel obligated to make significant purchases. Females tend to focus more on grooming rituals and prepare to “be wooed”. Members of both sexes discuss themes of belongingness and romance. Males are inclined to use gifts as a form of nonverbal communication, whereas females engage in self-gift behaviors. Females spend a considerable amount of time and money in preparation for “the day.”

Limitations of our study include relatively small sample sizes and restricted geographic/demographic focus. Furthermore, most of our informants focused on heterosexual relationships. One direction for future research is to examine, in detail, other kinds of relationships. Another way to expand our focus would be to study Valentine’s rituals in other cultures. For example, in South Korea, the gender roles are often reversed, and the holiday is a time for the female to provide a gift (e.g., and express her “hidden affections”). Culture and practices learned at an early age are large contributors to rituals and meanings associated with a holiday. Nonetheless, these ritual practices change and evolve over the course of a lifetime. In terms of future research, the following three questions are of interest: 1) In elementary school, Valentine’s Day is an egalitarian holiday with equal exchanges of cards and gifts to both sexes. How is it, then,

that all of this has changed by the adult years, which now focuses attention on the female?, 2) Why is it that females have such high expectations for this holiday?, and 3) Why is Valentine's a holiday that seems to befuddle males so much? Females seem to have firm expectations, but males (at all ages) find the "meaning" of the holiday to be elusive.

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## CHAPTER 4

### A MULTI-METHOD INQUIRY OF VALENTINE'S DAY: CONSUMER PERSPECTIVES AND RETAIL STRATEGY<sup>3</sup>

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<sup>3</sup> Close, A.G. and G.M. Zinkhan. To be submitted to *Journal of Advertising Research*.

## ABSTRACT

Through a retail lens, consumer-ascribed meanings of Valentine's Day holiday are explored. The first objective of Study four is to investigate Valentine's Day, as it is celebrated by adults in the U.S., from the perspectives of different segments of consumers, controlling for gender, relationship status, and relationship length. The second objective is to explore the holiday from the viewpoints of retail managers and executives who strategize around Valentine's Day. Shoppers' relationships with products, brands, websites, and retailers/e-tailers are explored. A final objective is to provide implications for retailers and extend extent theories.

The objectives are addressed via a multi-method approach. Six complementary methods are used from approximately six years of data collection (2000-2005). The six phases of data collection include: 1) interviews with retail executives and managers; 2) observations and interactions in the retail environment; 3) a survey of consumers in a romantic relationship; 4) analysis of diaries from consumers with various relationship statuses; 5) analysis of online diaries and postings; and 6) group interviews with females in a dating relationship. The data are analyzed from a retailing perspective.

While some consumers may celebrate feelings of affect or love, other consumers may not particularly like this holiday for a number of reasons. Rooted in resistance theories, the phenomenon of market resistance (i.e., some individuals or groups exude various degrees of resistance from hesitance to boycotts of the holiday) is explored. A similar phenomenon of "retail resistance" may apply to retailers and e-tailers that the resistant consumers associate to Valentine's Day. Theories employed to explain the findings include: a) materialism theories (e.g., Csikszentmihalyi & Rochberg-Halton 1981),

b) monadic gift theories (e.g., Mick & DeMoss 1990a, 1990b, 1992, Mick, Demoss & Faber 1992), and c) resistance theories (e.g., Perls et al. 1951, McGuire 1964, Brehm 1996, Newman 2002). Furthermore, aspects of each theory are extended here.



## INTRODUCTION

Valentine's Day is a unique challenge for our company. It is more than any other holiday a late buying season. The bulk of our sales come three days before the holiday. And it's right after Christmas. People are tired, broke, and headed six weeks later with having to give another gift to their spouse. It provides some unique challenges that we as retailers don't get on for example, Mother's Day or even at Christmas. This holiday is so big because it is so focused on two main things. First it is about the main recipient- the spouse, boyfriend or girlfriend. And then it's also an opportunity to tell your kids that you love them. Remember back at Valentine's Day in school? You gave a Valentine to everybody in the class. That mentality bleeds through for some people. We do get some "thinking of you" sales, but love is the biggest thing that people try to communicate for Valentine's. It's a *huge* deal for us. [Interview with Retail Executive, 2005]

The retail executive quoted above sums some qualities and key challenges that just one holiday brings to retailers and consumers year after year. On the surface, retailers may often portray Valentine's Day as a simple holiday; nonetheless, buyers may attribute a wide variety of rituals, meanings, and commercial efforts to this holiday and associated purchases. Valentine's Day rituals seem to constantly evolve along with the holiday itself, as well as with technology. New traditions and retail practices emerge each year (e.g., e-cards, speed dating) to add to its emerging complexity. We explore these issues from consumer and manager points-of-view with respect to best retail practices for this holiday.

Empirical research on holiday consumption, specifically exemplified by Valentine's Day, is important for a number of reasons. First, purchases and gift exchange for this holiday are a socio-culturally significant practice. Second, there may be a latent cultural tension and market resistance around this holiday, which we will fully explore. And of course, perhaps of most interest to retailers, is the economic significance of this gift-oriented holiday. Americans spent 13 billion dollars for this holiday this year, a substantial

increase from previous years (National Retail Federation 2005). Valentine's Day is an up-and-coming holiday for retail. Not only may it be expanding in scope (e.g., from celebrating romantic relationships to celebrating other types of relationships), it may be expanding in length (e.g., from February 14<sup>th</sup> to a weekend celebration).

We explore the notion that Valentine's is a holiday of extremes. On one extreme, individuals may have high levels of affect or love for this day. On the other extreme, various segments of consumers may not particularly like this holiday. The concept of "market resistance", where some individuals or groups exude various degrees of resistance from hesitation to boycotts of the holiday, is well-suited to this market. Others may show degrees of "retail resistance" to select retailers that are associated with the holiday (e.g., Hallmark). Furthermore, the holiday is experiencing a cultural exchange with international markets. This cultural exchange is even one source of backlash in parts of India, where recognition of the day is banned due to the Western ideals it represents and potential erosion of Indian culture. For instance, retailers in some Indian states have a government-imposed ban on stocking Valentine's Day cards. As a result, there is an underground market for this holiday in these regions. It is possible that some of the insights generated from a comprehensive study of Valentine's Day will serve as a platform for cross-cultural studies and may be generalizable to other gift-oriented holidays in the U.S. or abroad.

We contribute to the body of knowledge by presenting a broadened scope of this holiday in many ways. For example, past focus on this holiday stems from male perspectives and behaviors (cf. Otnes, Ruth and Milbourne 1994; Rugimbana, Donahay, Neal and Polonsky 2003). Here, we incorporate both male and female perspectives. We

also broaden the scope of this holiday by conceptualizing it as more than a time for celebrating romance and romantic relationships. We study it with respect to a series of non-romantic and non-traditional relationships. In addition, we include shoppers' relationships with products, brands, websites, and retailers/e-tailers.

In general, holiday shopping and seasonality are key aspects of retailing and e-tailing. Nonetheless, few studies in the *Journal of Retailing* explicitly investigate these recurring phenomena and their importance to shoppers, retailers and e-tailers. To provide a previously unexplored retail and e-tail focus, we present a multi-method study of this unique holiday as it is celebrated by adults in the U.S. We investigate this holiday from the perspectives of different segments of consumers, controlling for gender, relationship status, and relationship length. To link with industry, we explore the holiday from the viewpoints of retail managers and executives who strategize around Valentine's Day. We study the extent to which deeply-rooted meanings in a variety of contexts underlie buyer behavior associated with this holiday. Retail executives state a specific desire to understand these consumer-ascribed meanings with respect to their decisions. Thus, two research questions guide our objective to generate meaning and extend theory:

***RQ1: What does the Valentine's holiday mean to consumers (i.e., identifying implications for retailers and e-tailers)?***

***RQ2: What are the best ways for retailers and e-tailers to shape consumer expectations and experiences related to this holiday (i.e., to cater to the Valentine's Day holiday)?***

We address these questions via six complementary methods stemming from six years of data collection: 1) depth- interviews with retail and e-tail executives and managers, 2)

observations in the retail environment, 3) consumer diaries, 4) e-diaries and online postings, 5) surveys, and 6) group interviews. Each method contributes insight to the research questions from a different angle, in order to create a more holistic understanding of the holiday and a basis for subsequent retail recommendations.

This paper is organized as follows. We begin by reviewing the Valentine's market and relevant literature. Next, we describe methods, data collection and analysis. We then report and discuss the findings, focusing on key findings of interest to retailers. We conclude with a series of retail recommendations and areas for extending this work in terms of theory development. We now share a brief background for the holiday, its market, and introduce themes and theories from relevant literature.

## BACKGROUND & EXTANT LITERATURE

### **Holiday Culture, Characteristics, and Background**

Valentine's Day is celebrated in many nations, but, often, the focus is different (e.g., in terms of gender roles and behaviors) and embedded in the respective culture. Gender and social roles often vary by country or region. For example, in Korea, the male role of the gift giver is reciprocated by the female on approximately a month later on White Day (similar to Bachelors' Day in China). For another example of a cultural difference, in Australia, children take little or no part in the day (Australians do not commonly refer to it as a holiday) as they do in the U.S. Because of such cultural and social differences, we currently focus on the holiday as it is understood, practiced, and "celebrated" in the U.S in this study.

Some characteristics of Valentine's Day apply to most gift-oriented holidays in the U.S. (e.g., Christmas, Chanukah, Easter, Mothers' Day, Fathers' Day). Just as with these other holidays, it is associated with an abundance of distinctive products, foods/drinks, celebration, recognition, leisure, consumption, gift exchange, festivities, and a hint of excitement combined with a bit of anxiety for some. Yet, this is also an intimate holiday. Where other holidays often involve gatherings of extended family (e.g., Thanksgiving) or perfect strangers (e.g., 4th of July Parades), Valentine's Day, after the childhood years, traditionally celebrates an intimate romantic relationship or serves to foster an intimate relationship.

This day (and its surrounding retailing season) is unique in other regards. Compared to other major U.S. holidays (e.g., Christmas, Chanukah, Easter), Valentine's Day does not have strong religious associations—despite the fact that it bears a saint's name. It has a long history of varying rituals, tracing back to the ancient Roman Republic.<sup>4</sup> In approximately 300 B.C., pagans enacted a ritual of lottery dating (in which young men drew names for their girlfriend of the year) on the Ides of February. It was not until 290 A.D. that Saint Valentine performed Christian marriages against the state's command. As a result, Saint Valentine was beheaded on February 14th, and inspired a consumer ritual by writing a note to his loved one signed, "from your Valentine". This historical "event" is now a lucrative retailing holiday.

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<sup>4</sup> The history and background of St. Valentine and Valentine's Day is disputed and somewhat controversial. We present the story of St. Valentine as one possible explanation for this holiday's origin.

## **Valentine's Market Overview**

During an otherwise slow month for retailing, Valentine's Day brings heightened commercialism and spending. For instance, Valentine's Day accounts for more floral sales than any other day (*Society of American Florists* 2004). In a recent study, over sixty-five percent of men stated plans to send flowers for this holiday (*National Retail Federation* 2003). Retailed products, in addition to greeting cards, floral arrangements, jewelry, sweets (especially chocolate) that are promoted heavily during this holiday are, of course, not the only vehicle of exchange. Many services are promoted for Valentines Day- especially massages, spa treatments, and other luxurious and somewhat sensual indulgences. The restaurants and grocers also promote the romance of wining and dining loved one(s) for Valentine's.

In terms of emerging practices, the pharmaceutical marketers are getting involved with Valentine's Day. For example (despite disapproval from the FDA), Pfizer's Viagra claimed to be the "official sponsor of Valentine's Day", in a recent print advertising campaign. Their competitor, Eli Lilly, also strategically used the holiday (to launch the similar drug, Cialis). By these actions, the pharmaceutical industry is acknowledging the sexiest day of the year. Aside from private sexual exchanges, Valentine's is a time for gift exchanges.

## **Valentine's Gift Exchange**

We now summarize much of the extant literature on Valentine's Day, primarily through the lens of gift exchange- a key focus reflected in prior academic research related to this holiday. Much of the research is specific to gift giving, however, we include

perspectives on gift receipt and exchange (e.g., via exchange theory) as well. We review four areas of gift exchange that are most applicable to Valentine's Day: 1) symbolic gift exchange in romantic relationships, 2) altruistic and obligatory motives, 3) planned procrastination, and 4) over-commercialization of giving.

*Symbolic Gift Exchange in Romantic Relationships.* It is important to note that roles and meanings of gifts are context bound (Sherry 1983, Belk 1993) and occasion bound (Ruth, Otnes, and Brunel 1999). Furthermore, these roles and meanings are associated with the nature of the relationship between the giver and recipient (Ruth et al. 1999). Gift exchange contains an element of self-symbolism (Wolfenbarger and Gilly 1996) strengthens reciprocal relations and builds trust (Ruth et al. 1999). One broad level of relationship context is gift exchange among consumers in a romantic relationship, as Valentine's symbolizes romance and love. Love is one key consideration for gift giving within romantic relationships (Belk and Coon 1993). Social exchange theory and expectancy-based economic theories were accepted in the gift literature, until Belk and Coon (1993) introduced the idea that love is a key missing factor in the explanations of gift giving. Their Model of Agapic Love presents gift giving from an unselfish or altruistic viewpoint. Huang and Yu (2000) test this model and find strong links between gift consumption amongst partners and the length of the romantic relationship, which we will also explore. Love, however, has not been linked to gift receipt- even in the context of romantic relationships.

*Motives.* Such gestures and gifts for this holiday should be "from the heart" and pure. A pure gift translates to unselfish behavior, generalized reciprocity, no expectation of return, pure expression of the heart, material worth transcended by sentiment, and

noncalculating, nonrational behavior (Arnould, Price and Zinkhan 2004). However, not all Valentine's gifts are pure gifts or altruistic. College males report obligation, self-interest, and altruistic motives behind gift giving (Wolfenbarger 1990, Otnes et al. 1994, Rugimbana et al. 2003). Yet, altruistic giving is not as important as obligation or self-interest (Goodwin, Smith, and Spiggle 1990). It has been found that gifts are purchased stemming *only* from motives of obligation or self-interest (Goodwin et al. 1990). These motives however are not mutually exclusive (Rugimbana et al. 2003). However, most of these findings derive insight from a young-male perspective, and we extend past work by examining these themes as derived from various customer segments and by linking themes to prescriptive retail and e-tail strategies.

*Planned Procrastination.* Although some customers engage in planning, many put off their shopping activities until the last minute. Thus, most on-ground sales transactions take place less than one week prior to February 14<sup>th</sup>. Furthermore, one third of men plan to shop just one *day* beforehand (*International Mass Retailers Association* 2000). Ironically, many make plans to procrastinate. Specific to Valentine's gift giving, Netemeyer, Andrews and Durvasula (1993) show how three behavioral intention models apply to planned and voluntary behavior. Where they provided a link from intentions (i.e., plans) to behavior, we focus on actual behavior and extend the literature into online planning and behavior.

*Over-Commercialization of Giving.* There are limited amounts of research on the topic of over-commercialization of gift giving (e.g., Wooten 2000, Mortelmans and Damen 2001). Increased commercialization of giving holidays may change the nature of gift giving (Mortelmans and Damen 2001). Wooten (2000) links obligation to increased



anxiety; yet, we suggest that the mass commercialization of the holiday may also be associated with heightened anxiety. However, these concepts have not been directly applied to the Valentine's Market.

As we discuss our empirical findings, we introduce various theories, including materialism theories (e.g., Csikszentmihalyi & Rochberg-Halton 1981), monadic gift theories (e.g., Mick & DeMoss 1990a, 1990b, 1992, Mick, Demoss & Faber 1992), and resistance theories (e.g., Perls et al. 1951, McGuire 1964, Brehm 1996, Newman 2002). We integrate these theories with our findings and discussion. In the next section, we present our research methods.

## METHODS

We use a multi-method approach to understand Valentine's Day from both a consumer and a retail perspective. We employed six methods over a span of almost six years (2000-2005).

### **Multiple Method Study**

The six phases include: 1) interviews with retail executives and managers; 2) observations and interactions in the retail environment; 3) a survey of consumers in a romantic relationship; 4) analysis of diaries from consumers with various relationship statuses; 5) analysis of online diaries and postings; and 6) group interviews with females in a dating relationship. While most informants discussed heterosexual romantic

relationships, we collected data on various kinds of human relationships (e.g., familial, homosexual, friendly). Table 4.1 summarizes our methods, sample sizes, informants, time frame, and focus for each phase of the study.

**Table 4.1: Multiple Methods**

<b>Method (Sample size)</b>	<b>Informants/Participants</b>	<b>Time Frame</b>	<b>Focus</b>
Managerial Interviews [R]* (n=18)	-Corporate Marketing & Retail Executives -Managers of Retail Establishments -Individual and Chain Stores -National Sample	2004	In-store aspects, targeting, positioning, pricing & promotional strategy for Valentine's
Observation s/ Fieldwork [O] (n=41)	-In store/virtual store -Retail Employees & Shoppers -Valentine's Gift Givers -Males and Females -Various Ages -Various Relationship Statuses	2003- 2005	Interaction with various managers, employees, and shoppers on the week of and on Valentine's Days & observatory field notes
Survey [S] (n=198)	-College students -Males and Females -Age 18-28 -Currently in a romantic relationship	2003- 2005	Gift expectations, purchase motivations, timing, actual purchase behavior, comfort level & spending level, open-ended comments
Consumer Diaries [D] (n=149)	-Males and Females -Ages 18-47 -Various Relationship Statuses	2002- 2005	Cultural rituals, gender roles, enjoyment factor, marketing and retail associations & comparison to other holidays
Online/ e- Diaries*** [E] (n=47)	-Posters to online diaries & boards -Males and Females -Various ages -Various relationship status	2000- 2005	Naturalistic consumer thought (Sources include: diaryland.com, opendiary.com, my- diary.org, diarist.net, mydeardiary.com)
Group Interviews	-College students -Females	2003	Rituals, meanings, traditions, purchases,

[G] (n=6)	-Age 18-22 -Currently in a romantic relationship		meanings behind the purchases & us-gifts
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\* denoted by [R]; \*\* gender denoted as [M or F] when given; \*\*\* web posting date documented

*Phase I: Retail/E-tail Managerial Interviews [R].* We conducted depth interviews with retail and e-tail managers in industries that emphasize this holiday in their retail and marketing strategy. Our sample comes from industries such as greeting card, floral, jewelry, chocolate, confectionary, cosmetics/beauty, fragrance, mass discounter, and department stores. Retailers range in scope from small, independent boutiques to large multi-national companies. Many organizations in our sample have an e-tail counterpart as well. Some interviews were conducted in person (in the retail establishment) and other interviews were conducted via telephone due to geographic restrictions. The structured interviews lasted forty-five to ninety minutes, and are recorded and transcribed.

*Phase II: Observations/Fieldwork [O].* In order to examine consumer and retailer issues in tandem, we spent time in the retail and e-tail stores that are popular during this holiday. In stage one, we conducted fieldwork in a floral department of a large national grocery store chain. We had permission to sit with the employees and interact/talk with shoppers as they chose floral arrangements and gifts during the week of and on Valentine's Day 2003. We conducted the second round at a different retailer in a large southeastern city during the week of and on Valentine's Day 2004. A final round of retail observations was done during the weekend before Valentine's Day 2005. Stages one took place in mid-size southeastern city, stage two took place in a large southeastern city, and stage three took place in a large southwestern city.

*Phase III: Survey [S].* The purpose of the survey is to gather insights from young consumers. We distributed a twelve-item survey on Valentine's Day (2003) to 100 college students, to 98 individuals (2004), and to 100 in (2005). We performed tests for pooling and then combined the samples (n=198). There is a relatively even representation from each gender and relationship length.

Respondents reported whether or not they are in a romantic relationship. If so, we instructed them to continue. If not, we directed them to skip part one of the survey (about purchasing for their romantic partner) and go to the section with open-ended questions. As suggested by Huang and Yu (2000), we classified daters as either in a new relationship (less than six months) or in a more established relationship (six months or more).

*Phase IV: Consumer Diaries [D].* 149 consumers kept diaries related to their thoughts and behaviors concerning the holiday. The age of diary authors ranged from 18-67. A relatively even distribution of males and females in various relationship statuses (e.g., single, dating, married, divorced, widowed), professions, and geographic backgrounds completed entries. Individuals wrote about their experiences with the holiday's: a) cultural rituals, b) gender roles, c) marketing and retail associations, d) enjoyment factor, and e) comparison to other holidays. Consumer diaries lend to a personal feel, and some informants feel more comfortable writing their story rather than sharing it in person. Attention to this issue is especially salient due to the intimate nature of this holiday for many.

*Phase V: E-Diaries and Online Postings [E].* To complement the offline diaries, we collected online diary entries and postings on and about this holiday. These sites give

posters the option of sharing their name, screen-name, sex, and location; however, many choose not to reveal their on-ground identity via computer-mediated-communication (CMC). The anonymity and facelessness here provides for rich, less censored sentiments and experiences with the holiday. Importantly, those who discuss this holiday in their online, public diaries or message boards do so from their own inner desire. This online sample is particularly appropriate for studying the e-tailing aspects of our study.

*Phase VI: Group Interviews [G].* To incorporate group dynamics, we conducted group interviews with females in a romantic relationship. A coed presence could inhibit discussion on this topic. We chose to focus on females, as this holiday is largely regarded as a female holiday and we are interested in how retailers can provide goods of interest to females. Female college students (half in a new relationship and half in a more established relationship) engaged in discussion with the moderator for ninety minutes as a female author took field notes.

## **Data Analysis and Theme Development**

For the qualitative methods, we iteratively analyzed the data based on our research objectives and themes identified in the extant literature. Via axial, open, and selective coding techniques, we grouped similar findings and observations into categories of meaning. Such grouping contributed towards revealing the emergent patterns of each category (Wolcott 1990). In the process, many new themes became apparent. The authors reviewed each other's data interpretations until key findings reached a point of

saturation. Although we found many consumer themes, we focus here on findings of retail importance.

We used suggested approaches (Spiggle 1994) to increase validity and reliability. We used multiple methods to depict an overall, holistic understanding of our research questions as suggested by Creswell (1998). We triangulated the data in many ways. For instance, we spent time in bricks-and-mortar stores as e-tail stores. We collected data in electronic environments (e.g., online diary sites, message boards, blogs, chat rooms, e-tail sites) in addition to collecting data in the traditional on-ground retail environment. We considered multiple theoretical perspectives to ground the findings. We bracketed introspective notes during each phase. We followed up with individuals and presented the completed study to retail executives for their feedback. The findings, presented next, begin with a consumer-focus.

## FINDINGS

### **RQ1: What does the Valentine's holiday mean to consumers (i.e., identifying implications for retailers and e-tailers)?**

We begin by discussing what the holiday means to consumers within the broader objective of identifying implications for retail/e-tail practice. These meanings are positive (i.e., togetherness, affection and love, instrumental gift giving, pride and entitlement, opportunities, expectations) and negative (i.e., obligation and spending, market/retail resistance). We begin with positive meanings and then explore the dark side.

In Table 4.2, below, we provide a link between consumer meaning and retailing practice. We first summarize relevant findings about consumer meanings (see column one). We focus on those meanings that translate to managerial implications for retailers and e-tailers. We stress the importance of considering consumer meanings and practice in tandem. Thus, in column two, we present the retailing insights that derive these consumer meanings. The retail perspectives are discussed in more detail in the second part of the paper (RQ2).

**Table 4.2: Consumer Findings and Retail Strategy in Tandem**

<b>Themes</b>	<b>Relevant Consumer-Based Findings</b>	<b>→</b>	<b>Actions for Retail Strategy</b>
Togetherness Affection & Love	<ul style="list-style-type: none"> <li>-Sex as a gift</li> <li>-Consumers celebrate more than romantic relationships</li> <li>-Common day for proposals &amp; marriages</li> <li>-Instrumental materialism exists</li> </ul>	<ul style="list-style-type: none"> <li>→</li> <li>→</li> <li>→</li> </ul>	<ul style="list-style-type: none"> <li>-Feature products that enhance intimacy/sexual experiences</li> <li>-Recognize other themes beyond romance</li> <li>-Promote the holiday for familial &amp; friend-based love</li> <li>-Recognize alternative romantic relationships</li> <li>-Feature wedding &amp; honeymoon associated merchandise</li> <li>-Provide more extravagant goods for dual celebrators</li> <li>-Promote and provide instrumental gifts</li> </ul>
Instrumental Gift Exchange	<ul style="list-style-type: none"> <li>-Gift exchanges show selfless love</li> <li>-Giving shifts with relationship stage (e.g., giving decreases as relationship matures, children enter the exchange)</li> </ul>	<ul style="list-style-type: none"> <li>→</li> <li>→</li> </ul>	<ul style="list-style-type: none"> <li>-Recognize females as gift givers and gift receivers</li> <li>-Promote sparking up older relationships with gifts &amp; retail-based exchanges during this holiday season</li> <li>-Include gifts for children as an important part of the holiday</li> </ul>
Opportunities	<ul style="list-style-type: none"> <li>-Singles see opportunity to self gift</li> <li>-Those in a relationship see an opportunity to use gifts an opportunity to look</li> </ul>	<ul style="list-style-type: none"> <li>→</li> <li>→</li> <li>→</li> </ul>	<ul style="list-style-type: none"> <li>-Have gift registries for singles (analogous to wedding registries)</li> <li>-Feature &amp; promote us gifts for the couple</li> </ul>

	better for their partner -Women in new relationships prepare their body for the holiday -Heightened opportunities to pursue romantic interests -More dating opportunities -Singles seek other singles' company -Consumers feel excitement -Temporary confidence-booster -Opportunity to enact gender roles	→ -Feature & promote beauty, health & exercise products → -Foster opportunities to pursue romantic interests with retail gifts → -Feature secret admirer goods → -Hold/sponsor dating parties & events → -Enhance excitement with retail promotions -Partner with e-dating sites or speed-dating events in the area -Reinforce gender roles with marketing messages and goods
Pride & Entitlement	-Gift competition & one-upmanship occurs in gift giving & receipt -Consumers proudly display retail boxes, bags, luxury brands & gift(s) -Receiving the gift in public is important to some -Consumer pride exists in giving and receiving thoughtful, quality, or elaborate gifts -A day entitled for guiltless consumption -Spending more on the gift recipient may be linked to hopes of diminishing consumer guilt associated with that relationship -Females are entitled to be pampered on this day	→ -Carry & promote luxurious brands → -Make the box or bag worthy for consumers to display → -Feature gifts that can be delivered to or used at the workplace or other public environment → -Provide a vast selection of original and quality gifts and packaging options that the consumer will be proud to give/receive → -Consumer "vice goods" (e.g., alcohol, chocolate) are in increased demand from these consumers → -A challenge for retailers when the good can not replace/ make-up for the source of the guilt -Provide products and services that pamper females of all ages and relationships
Expectations	-High expectations from women -High expectations from those in a new relationship -Expectations for an	→ -Feature vast selections for female gift recipients → -Feature gifts/cards appropriate for new relationships → -Offer a gift that keeps on giving (a pear tree)



	<p>experiential &amp; a lasting gift</p> <ul style="list-style-type: none"> <li>-Consumers expect thoughtful gifts</li> <li>-Men do expect gifts</li> <li>-Men confused about what is expected from them</li> <li>-Dual celebrations heighten expectations</li> <li>-Childhood celebrations shape adult expectations of the holiday</li> </ul>	<p>→ to plant)</p> <p>→ -Find ways to personalize or customize gifts</p> <p>→ -Make it easier for women to find male-oriented gifts</p> <p>→ -Suggest appropriate gifts for various recipients</p> <p>-Feature lavish products for dual celebrations</p> <p>-Treat this day as a holiday for all ages</p>
Obligation & Spending	<ul style="list-style-type: none"> <li>-Males overwhelmingly feel obligated to give to their romantic partner</li> <li>-Females do feel obligated to give to a lesser extent</li> <li>-Obligation to give is high from consumers in new relationships</li> <li>-Consumers may see gift(s) as unnecessary to continue their established relationship</li> <li>-Some give with expectations of investing in the relationship</li> <li>-Gift misinterpretation fear exists</li> <li>-Most consumers in a romantic relationship purchase a gift(s) for their partner</li> <li>-Spending is often procrastinated during this holiday</li> </ul>	<p>→ -Remind consumers that their “obligation” is approaching</p> <p>→ -Reinstate importance of giving gifts to males</p> <p>→ -Feature gifts appropriate for new romantic relationships</p> <p>→ -Promote value of celebrating the holiday/gift exchange for adding passion, pursuit &amp; excitement to a committed relationship</p> <p>→ -Embed long-term relationship into the good (e.g., the three-stoned past, present &amp; future ring)</p> <p>→ -Encourage giving cards to express what they want the gift to communicate</p> <p>→ -Consumers fulfill their perceived obligations with shopping &amp; retail purchases</p> <p>→ -Consumers spend over and beyond feelings of obligation</p> <p>→ -Provide gift wrapping options for last-minute buyers</p> <p>→ -Allow for quick shopping</p> <p>→ -Expand the retailing season</p>
Market & Retail Resistance	<ul style="list-style-type: none"> <li>-There is a substantial amount of resistance to the Valentine’s holiday market</li> </ul>	<p>→ -Make the holiday more consumer-friendly with products, services, &amp; promotions to include those who are unhappily single, physically apart from their loved one, or in an unhappy relationship</p> <p>→ -Connect with consumers’ negative meanings with a satirical or humorous</p>

	<ul style="list-style-type: none"> <li>-Males are not the only one's with strong anti-Valentine's Day feelings</li> <li>-Consumers feel that love should not be reserved for just this day</li> <li>-Society interprets the holiday incorrectly (i.e., a day for material exchange)</li> <li>-The holiday is tainted by capitalism yet still celebrated in the private sphere</li> <li>-Consumers exhibit "Voluntary Simplicity"</li> <li>-Select industries &amp; companies own the holiday</li> </ul>	<ul style="list-style-type: none"> <li>→ approach to the holiday &amp; related inventory</li> <li>→ -Recognize that not all females welcome this day</li> <li>→ -Incorporate themes of love and human relationships during other times of the year in addition to Valentine's season</li> <li>→ -Incorporate the human component at least as much as the product/material representation</li> <li>→ -Heightened opportunities for grocery stores (vs. restaurants); Movie/music purchases/rentals (vs. theatres or live shows) and partnerships</li> <li>-Feature products and ingredients suited for a more subtle recognition of the holiday</li> <li>-Promote the idea that consumers and their relationships own this holiday</li> </ul>
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As the above table shows, retail recommendations stem from each of the consumer-stated meanings.

### **Togetherness, Affection and Love**

Informants often discuss togetherness, affection and love as true meanings of this holiday as revealed in the following two examples:

Valentine's means displays of love, affection, and care. [F, D]<sup>5</sup>

I enjoy Valentine's Day. I usually find someone special to spend it with. I look forward to it every year. [M, S]

In the private sphere, passion and sexual intimacy, not to be confused with love, are a big part of this holiday. Some (especially women) consider sex to be the most intimate exchange shared. Informants share that sex is one of the "understood" rituals of

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<sup>5</sup> Female, Diary

Valentine's Day. In the public sphere, we observe more hugs, kisses, and handholding on this day. Informants feel that public displays of affection (PDA) are appropriate on February 14<sup>th</sup>. Some informants reveal that they hope intimacy in the public sphere (e.g., hand-holding in a store) will turn to intimacy in the private sphere (e.g., sex).

Affection and love for this holiday is not limited to romantic interests, contrary to traditional thought and some past studies. Informants often associate it with *all* loved ones:

Valentine's Day means showing love and affection. I do not know anyone who wants to spend Valentine's Day alone. I love to spend my Valentine's Days with the person I am dating or my family. I love buying and giving gifts during this holiday but the most important thing is being with the people I care about and love. [F, D]

Having people around to share special occasions leaves a much stronger impact in one's life rather than receiving material things. Every year on Valentine's Day, I have a nice breakfast with my parents and then a romantic dinner with the person I am dating... that way I can spend a little time with everyone that I love. [F, D]

While togetherness, affection and love are key themes, the celebrations are much broader than the extant focus on *romantic* relationships. Instead, many see this as a holiday to show affection or love to family and friends as well as to romantic partners. One woman describes her Valentine's Day without mention of lavish gifts, yet with emphasis on her loved ones:

This year I confess. I sold out on account of grad school. My family has been sweet and understanding; our festive “family and friends dinner” decked out in doilies and handcrafted specialties (and yes, red food-there are good red foods) is not to be (I do notice that in my inability to produce this grand affair, no one else has risen up to carry on-hmmm-there's something worth thinking of). The most poignant point of this day was sitting (via the phone and cyberspace) with the deep grief of several dear friends who find themselves not only with no lover but, in the painful place of dissolving long standing marriages. I found an anniversary card I bought for Kev (a very perfect one mind you) several years ago and lost before I gave it. I added “Happy Valentine’s Day” with a note of true love and presented that with oatmeal this morning, tossed the kids some chocolate kisses and sent them out the door with not homemade Valentine’s for school (sigh) along with a kiss on the nose to take them through the day. I’ll treasure the warm hugs on the way out the door for class tonight...but, no story telling round the warm table, no heart shaped meatloaf (yes, we do that too!)...Next Year though... [F, E, 2-14-2005]

This is just one example of the importance of family appeal, recognition of friends (single and committed), romantic nostalgia, and a move towards convenience. Humble instant oatmeal and pre-packaged chocolate kisses replace high-maintenance doilies and homemade heart-shaped meatloaf. Mass-produced Valentine cards replace hand-crafted cards. Convenience products enable customers to spend time with loved ones (i.e., a broader purpose of the holiday). In this sense, retailers may help consumers foster and maintain relationships. These relationships are often more meaningful to many consumers than the material gifts.

We associate the instances shared above with instrumental materialism, where possession of things (e.g., an old card) serves goals that are independent of greed (Csikszentmihalyi and Rochberg-Halton 1981). These goals have a specific scope within a context of purposes (Csikszentmihalyi and Rochberg-Halton 1981). In many examples, considered in their contexts, we see meaning embedded in behaviors and purchases (e.g., gifts) for Valentine’s Day.

## Instrumental Gift Exchange

Recall, some extant literature has studied the concept of altruism, or is complete unselfish regard for, or devotion to, the welfare of others. At times, one's altruistic gesture may even be harmful to him or her. A true altruistic exchange is emitted voluntarily and is not focused on gain. Altruistic gifts are thought extend a romantic relationship (Huang and Yu 2000). However, Goodwin et al. (1990) find that the altruism motive *rarely* occurs independently amongst young males, especially in relationships that are periods longer than six months. We find, however, some type of greedless gift exchange goes on. Consumers discuss gift giving as selfless and from the heart:

This is a good holiday to remind someone you care about them with a gift [M, S]<sup>6</sup>.

I like giving on Valentine's because it shows others that I care for or love them.  
[M, S]

We get gifts for each other just to show our love. [M, S]

Moreover, these gestures shift at various stages of the relationship. For example, after a couple has children, the focus shifts from celebrating the romance to also include their children:

My son's father and I have found that now that we have a six-year old, we spend the money on Valentine's items for our son rather than for each other. This year, we bought him a big bouquet of balloons. [F, S]

Based on our data, we introduce a new term to describe a greedless gift exchange-- an "*instrumental gift exchange*". An instrumental gift exchange is a vehicle to achieve one or more goals or purposes that are often other-directed (instead of self-

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<sup>6</sup> Male, Survey

directed). We propose that an instrumental gift exchange is a component of instrumental materialism. We emphasize here that instrumental gifts are not necessarily more expensive in monetary price; however, the gift-giver generally invests more time, thought, and meaning into these gifts and often in the way that they are presented. From this perspective, the woman who gives her children oatmeal, chocolate kisses, and a card or heart-shaped meatloaf is an example of an instrumental “gift”. The woman takes the time to give something that what will make the recipient happy or feel special on the holiday and she fulfils a greedless purpose (i.e., feeding the family).

Another example of an instrumental gift is an engagement or wedding ring.

Valentine’s Day is one of the most popular days for marriage proposals and marriages.

One informant extends her left hand and happily shares her recent experience:

We went to Atlanta and checked into the Westin on Valentine’s Day. We took a horse and buggy and rode around. We got off at Centennial Olympic Park and had heart-cut sandwiches and strawberries. My boyfriend had a velvet Godiva box (that I had asking to eat all day!) He later opened it and a ring was in there! He asked me to stand, got down on one knee and asked me to marry him! I was crying and, of course, it was one of the most exciting days of my life. [F, D]

One reason that this day is so popular for discussing new marriages is because of its association with extravagant romance and togetherness. Although a material thing, the ring is embedded with meaning for this couple in love. At the same time, it functionally serves as an outward symbol of inner meanings.

In terms of theory development, we introduce the idea of “relational materialism” as a subset of instrumental materialism. Relational materialism is a kind of materialism in which the purchase and or possession of things serves to better the relationship between the involved parties. In the context of gift exchange, the relationship between the gift

giver(s) and the gift recipient is positively affected by whatever is exchanged (e.g., balloons, ring, engraved bracelet). The examples above show that relational materialism is apparent in the context of Valentine's Day related purchases. Recognition of these trends has important implications for retailers (see Table 4.2). Again, we discuss the retailing implications more fully under RQ2. Furthermore, these findings have theoretical implications, as shown below in Table 4.3.

**Table 4.3: Contributions to Theory**

<b>Theoretical Domain</b>	<b>Our Contribution</b>	<b>Definition</b>
<b>Materialism Theories</b> (Csikszentmihalyi & Rochberg-Halton 1981)	Instrumental Gift Exchange	Greedless gift exchange, a vehicle to achieve one or more goals or purposes that are often other-directed (instead of self-directed)
	Terminal Gift Exchange	Gift exchange for the sake of gift exchange; such gifts are not associated with deep meanings
<b>Monadic Gift Theories</b> (Mick & DeMoss 1990a; 1990b, 1992; Mick, Demoss & Faber 1992)	Us Gifts	Gift purchased for the self and indirectly for the relationship partner in hopes of increasing attraction, sensuality, or beauty (e.g., lingerie, perfume, cosmetics)
	Market Resistance	Various individuals or groups feel hesitant about the holiday, and in some cases actively boycott the holiday
<b>Resistance Theories</b> (Perls et al. 1951, McGuire 1964, Brehm 1996, Newman 2002)	Retail Resistance	Some shoppers resist specific retailers that are associated with the holiday
	Voluntary Simplicity	A trend where consumers revert back to the private sphere, buy less pre-made goods, and willingly resist complex rituals
	Gift Resistance	Individuals set price limits to gift exchanges, do not give gifts at all, and/or encourage others not to engage in gift exchange

## Opportunities

Not all gifts exchanged are instrumental—some are opportunistic. Consumers associate many, sometimes self-directed, opportunities with Valentine's Day. These include opportunities for monadic gifts, us gifts, and opportunities with others.

*Monadic Gifts.* While instrumental gifts are for the other, monadic gifts are inherently for the self. A monadic gift, (i.e., self gift), is a consumer indulgence that is a gift to oneself (Mick, Demoss, and Faber 1992). There are motivational and semiotic aspects to such gifts (Mick et al. 1992). For instance, disrupted relationships strongly provoke women's self-gift behavior. Factors in the retail setting that affect this behavior include: a) the novelty or predetermination of the brand, b) price, and c) the salesperson's empathy for the buyer's personal situation. Furthermore, retail advertising and in-store displays with themes that emphasize women's personal independence may heighten shoppers' propensity to indulge themselves (Mick, Demoss, and Faber 1992).

*Us Gifts.* Some gifts are purchased for the self and indirectly for the relationship partner in hopes of increasing attraction, sensuality, or beauty. Examples mentioned include lingerie, perfume, and cosmetics. We propose that this category of gifts is termed "*us gifts*". Females speak of these purchases as a way to make themselves "absolutely irresistible" [F, G] for their partner. We find that more of the women in a new relationship indulge in this form of gift exchange. Women who spend Valentine's Day with someone special for the first time go to the greatest lengths to prepare themselves for the other. One possible explanation is that the pressure to impress the other with tangible items decreases as a relationship progresses.



*Opportunities with Others.* Valentine's Day, for some, represents a time to be more aggressive with other singles or act more daring than usual towards a romantic interest. The holiday grants opportunities to be direct with romantic or sexual feelings. Some singles choose to spend the day at singles events or with a group of singles. This is a time where singles overtly seek each other's company:

Singles might sit around in a group, watching movies or feeling sorry for themselves. Or, they might find a way to celebrate the day. [F, D]

Happy Singles Awareness Day!!! [F, S]

Other singles share how this is a time to go out together and try and meet someone, because other singles are out (while the couples are home or at a romantic restaurant). In a sense, this is a time of singles bonding over misery or positive excitement:

It's fun to go out and flirt and hang out with the girls in my position. [M, S]

There is a sense of magic, excitement, and romance. [F, D]

Some take initiative to rekindle a past spark or start a new flame:

It can be a day to try and find a loved one. It is a day when a secret admirer might emerge. [M, D]

These opportunities may temporarily boost confidence and make gender roles more salient. Most informants agree that Valentine's Day is a female-oriented holiday. It is governed by gender roles, as which one informant typifies:

The male is the wooer. The female role is to be wooed. [F, D]

Such gender roles may contribute to feelings of pride and entitlement to lavish attention and gifts.

## Pride and Entitlement

Many consumers exhibit a sense of pride or entitlement for lavishness during this holiday. Some consumers proudly display their retail boxes, bags, luxurious brands, or gifts. Some (notably women) prefer to receive a gift at work for co-workers to admire. To such recipients, the gift received in the privacy of home is not equally appreciated. There are elements of gift competition, one-upmanship, and guiltless consumption associated with this holiday. For instance, Valentine's Day stimulates a competition among some consumers (e.g., "look what *I* got...what did *you* get?" [F, G]<sup>7</sup>). In brief, it is a day where some gift-recipients engage in prideful behavior.

Outside of the Valentine's Day context, female daters frequently share feelings of guilt or indebtedness after having money spent on them (Belk and Coon 1991). Specific to Valentine's, however, we do not find feelings guilt or indebtedness from females in a dating relationship. On this day, they share a sense of pride. This is a time of entitlement to being pampered and spent on lavishly without guilt.

Females are *supposed* to be pampered and spoiled on this day. [F, D]  
For many, it is a day in which they are entitled to extraordinary consumption.  
Unremorsefully, consumers share their attraction and desire to spend on goods they just "can't help but buy".

In-store displays usually catch my eye. I buy things that are displayed because they are cute. [F, D]

I want all the fun candy displays and pink and red things for Valentine's Day.  
[F, D]

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<sup>7</sup> Female, Group Interview

The diminished guilt applies not only to buying the goods, but to consuming them. Some consumers consider the day as an excuse for excess consumption—particularly of chocolate.

It's a good excuse to eat lots and lots of chocolate. [F, S]

Chocolate is not an ordinary good; consumers associate it with love, sexuality, fulfillment, celebratory memories, gift exchange, comfort, deservedness, stress, guilt, and addiction (Costa and Belk 1999). A gender perspective of chocolate consumption is associated with “consumption and to be consumed”, as well as “romantic and sexual” (Costa and Belk 1999 p5). Perhaps it is these traits, combined with the retail efforts, which contribute to some consumers’ perceived entitlement to chocolate on Valentine’s Day. Next, we explore consumer expectations.

## **Expectations**

Valentine’s Day triggers consumer expectations (e.g., with respect to gifts). Simply put, those in a romantic relationship expect a gift. Specifically, 61 percent of the males and 67 percent of females expect to receive at least one gift from their significant other [S]<sup>8</sup>. Some males are sensitive to female expectations, although almost as many men also expect a gift:

The day is biased towards women. I think that men need romance and sweet things too. Women never put enough in but expect WAY TOO MUCH! [M, S]

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<sup>8</sup> Survey Finding

Males may not expect a lavish or expensive gift, but many males do want to be included and recognized by their partner on Valentine's Day. Females, however, may have more substantial expectations that arise from a number of sources. First, women have traditionally received more gifts than they give for Valentine's (Goodwin et al. 1990). Second, many females' self-concept is linked to the role of a gift receiver for this holiday [G]<sup>9</sup>. Third, females describe how reference groups, retail hype, e-tailers, and marketing "prepares them to be pampered" [G].

Interestingly, the highest expectations for this holiday come from those in a *new* relationship [S]. As relationship length increases, both sexes expect fewer and less lavish gifts (with the exception of relationship milestones) [S]. That is, as a relationship matures, people do not expect material gifts from their significant other to express their affection.

Expectations for this holiday may be partly shaped by childhood experiences. Early memories of the day evoke images of grade school and the parties, arts and crafts, candy and egalitarian exchange of cards. While policies now limit celebrations of religious holidays during class time in public schools, children are afforded time off from schoolwork for Valentine's Day. Because of these strong, early-rooted influences, consumers may build up high expectations for the day. As a result, consumers enter their teenage years with high expectations. Such heightened expectations may lead to disappointment (e.g., by teenage females who expect their male partner(s) to shower them with gifts and affection).

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<sup>9</sup> Group Interview Finding

In summary, expectations for this holiday are partially associated with relationship status, gender roles, reference groups, the retail/e-tail environment, marketing, and past experiences. These expectations may translate into obligation and spending, as we now discuss.

### **Obligation and Spending**

While many consumers (females especially) expect a gift, males and females feel obligated to buy a gift for their significant other. Most (63 percent) males and some (31 percent) females feel obligated to give a gift to their partner for this holiday [S]. Although females are most often recipients, they do feel purchase obligations to a lesser extent:

Valentine's is a way for retailers to get you to spend money in their stores. People get caught up in the B.S. and I shouldn't have to spend extra money to show I care, and my girlfriend agrees. But we both still spent plenty! [M, D]

Consistent with the findings of high expectations among those in a new relationship, a majority in a new relationship feel obliged. Males in a new relationship feel most obligated (81 percent) [S]. Some of these males feel they must purchase to invest in the relationship's future or even solidify the relationship status. They share that it is uncomfortable to admit feelings of obligation to a new relationship partner. Interestingly, the second most "obligated" group consists of females in a new relationship (50 percent) [S].

Comparatively, just less than half (44 percent) of males in a more established relationship feel obligated [S]. A very low 13 percent of females in more established relationships feel this obligation [S]. We see a common reason; a gift is "unnecessary to continue the relationship":

For those in a committed relationship, Valentine's gifts seem shallow and wholly unnecessary. For those not tied down, it's just a big pain in the ass. [M, S]

Gifts include an element of pursuit in the beginning stages of dating. Informants feel less obliged to exchange fewer and less lavish gifts for the holiday as their relationship matures. In other cases, the male feels obligated to reciprocate her purchase:

Although we are not in good terms currently, I know that she'll get me something so I had to buy her something... I've spent enough money on my girlfriend on past Valentine's Day, so she should be happy that I'm getting her anything! [M, O]

From our data, as exemplified above, we find elements of terminal materialism associated with this holiday. Terminal materialism is consumption for the mere sake of consumption and is a recent outcome of Western Industrial culture and capitalism (i.e., a market economy) (Csikszentmihalyi and Rochberg-Halton 1981). We extend this thinking to gift-giving, and propose the concept of "terminal gift exchange" (as one component of terminal materialism). A "terminal gift exchange" is a gift exchange for the sake of gift exchange, and this type of gift exchange is not associated with deeper meanings. In contrast, we propose that an instrumental gift (as described under the related themes of togetherness, affection and love) is associated with deeper consumer meanings.

Considering the concepts of instrumental gifts, 88 percent of men and 75 percent of women report that they bought their significant other a Valentine's gift [S]. These purchases are for reasons over and beyond obligation (e.g., love, lust). This is further support for the notion that giving motives (e.g., of obligation, self-interest, altruism) are independent and mutually-exclusive. Although more men purchased presents for their significant other, we confirm that women do represent a substantial component of the

romantic gift market for this holiday and commonly purchase gifts for family members and friends.

From our data, we find two reasons why some individuals do not give gifts to their romantic partner or impose price limits on the gift(s). We term this behavior as “*gift resistance*”. There are various degrees of gift resistance, ranging, for example from setting a five dollar limit to encouraging others not to give or exchange a gift(s). The first reason for gift resistance is due to the fear of gift misinterpretation. Specifically, individuals in newer relationships discuss the fear of their partner misinterpreting the gift. A second reason has to do with commitment. Gifts (especially expensive gifts) signal more commitment than a dater wishes to convey (Belk and Coon 1993); we find a similar explanation of gift resistance for a romantic partner in context of Valentine’s gift giving. Some consumers feel that giving a gift (or just a card) signals heightened commitment to the recipient or to the relationship.

Insight into consumer feelings of obligatory spending provides retailers with a unique challenge. Thus, this phenomenon creates a challenge for the retailers. On the one hand, consumers want buying opportunities. On the other hand, such promotions are resented by some consumers. These consumers may interpret retailing promotions in a negative light and sometimes resist the societal pressure associated with this holiday. We explore this finding in more detail in the forthcoming theme.

### **Market and Retail Resistance**

Retailers should be aware of the extent to which the anti-Valentine’s sentiments are growing. Resistance Theory (e.g., Perls et al. 1951, McGuire 1964, Brehm 1996,

Newman 2002) suggests that consumers will actively counteract retailers' attempts to limit choices. In addition, this theory predicts that consumers will not be likely to comply with specific or prescribed behaviors. In the case of Valentine's Day, consumer resistance is the motivation to oppose retailer suggestions (e.g., about what to say). Other consumers may resist to the extent of choosing not to participate in the holiday at all. Some may even persuade others not to participate in the holiday (e.g., a woman convinces her husband to skip Valentine's purchases and put the money towards their summer vacation). Consumers resist Valentine's Day for a number of reasons. Some reject to the notion that romantic gestures should be reserved for "this day and this day only":

I think it's a day that forces feelings we should exhibit everyday. In theory, its fine but we should act like this on a random Tuesday in November or any other month instead of just one day. I hate the whole marketing of gifts and guilt thrown on this one day. [M, S]

I hate Valentine's Day, because...I think if you love someone, you don't need a special day to show it. Every day is suitable for this. [M, E, 2-15-00]

I hate this day, because there are so many people who interpret this day in a wrong way. In fact if we love someone we'll always love him/her forever and ever. No matter what day it is. Like me, I love my family forever and ever. No matter what. [M, E, 2-06-00]

Other men and women see it as an otherwise meaningful holiday tainted by capitalism:

I love the concept of the day, but I HATE how it is one of those corporate holidays. [M, E, 5-20-04]

Valentine's has become a day that corporations in the U.S. exploit just to sell candy and novelty items. [M, S]

Valentine's Day is far too materialistically- driven. I think the focus needs to be on spending time together, not money on each other! [F, S]

I wish NO presents were given. It's just to promote business. [M, S]



Valentine's Day is a marketing technique designed to take advantage of people who are in love. [M, S]

It's a corporate holiday. Why designate a day to show you care except for monetary gain? [M, S]

Some informants are resentful of specific industries or retailers:

Valentine's Day is a GREAT marketing scam by the greeting card people. Everybody should recognize love and this day makes you pay attention to what matters. [M, S]

Valentine's Day is a.k.a. candy companies' "Maximized Profit Day". [F, S]

Valentine's Day is a marketing strategy by the candy companies. It's a cheesy, overblown, stupid "holiday" to force you to spend your money on each other [F, S]

Well it's been almost two months since Christmas, and us single folks are finally recovering from the psychological damage making it through the holiday season does to us. So as I am almost fully recuperated myself, I would like to extend a warm thanks to Hallmark, the official sponsor of Valentine's Day, for reminding me that without a significant other, how truly worthless my life is. In my defense, who wants to celebrate a holiday whose initials are VD anyway? However it is upon us and in light of the holiday...it's imperative to wallow in our mutual misery together. [F, E, 2-14-04]<sup>10</sup>

Retail-related hype provides an outlet for some consumers to channel their negative feelings. For instance, those who find themselves in an unhappy relationship or are physically apart from their loved one describe frustration created by retail hype:

Of all the wonderful (silent sarcasm intended) years of my ever-joyous life, I've come to some quite obvious realization that Valentine's Day is nothing more than a commercial holiday they exploit to drastically nauseating proportions. If someone is looking for a single day out of the year to share with that special someone, do it on their friggin' birthday. You should be more worried about the fact that you're alive, rather than if you're going to get a ton of chocolates or flowers from your significant other. To all those who have found their special someone in their life, I bid you congrats. However, for those of us who are still looking, like myself, I bid this past day a big...! [M, E, 2-15-01]

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<sup>10</sup> [E, 2-14-04] indicates an electronic post on Valentine's Day 2004.

Some individuals do not buy into this hype and form negative opinions about those who do. For instance, this consumer is disappointed in his friend who commits to this “love-dovey” holiday:

Another Valentine's Day has gone by only to leave me wondering **why?!?** Why do people get hyped up over a senseless holiday of commercialism? I made the effort of going to town and managed to see my friend, in Wal-mart of all places, getting something for his better half. I was semi-frustrated about this. This guy is the same one I spend about every Superbowl Sunday with, belching and doing the male bonding thing with. To see him buying something 'love-dovey' definitely makes me \*\*\*...! [M, E, 2-15-01]

*Market and Retail Resistance in Cyber-Communities.* Online anti-Valentine's communities are a virtual space where consumers share their market resistance (e.g., for sympathy, expression, understanding, companionship, anger-venting, elitism). Just as singles come together offline for this holiday, they gather online as well. For example, “Valentines from hell” is a virtual space that recognizes the somewhat bipolar nature of this holiday. Their mascot, part cupid and part devil, represents elements of good and evil associated with the holiday. Some share coping strategies to get through the holiday while encouraging resistance:

I've spent this valentines surfing the net, looking for sites about love sucking! My boy of 4 years broke up about 1 month ago; he is with someone right now...DEATH TO VALENTINES! [F, E, 2-15-00]

I want to urge everyone to join me in sending hate mail instead of Valentine's on this wonderful day. It makes you feel better. I promise. [F, E, 2-15-00]

It may be easier to spread contempt for this holiday on the faceless Internet. Anti-Valentine online communities even discuss ways to overthrow the holiday completely:

I always used to hate this holiday, and my friends told me I was weird- but now I know I'm not alone! ABOLISH VALENTINE'S DAY! [F, E, 2-11-00]

While they feel that an offline world without Valentine's Day would be a better place, their experiences in cyberspace provide a sense of bonding over resistance. Some dislike for the holiday (and what it represents) stems from unfulfilled expectations, which are partly shaped by the retail aspect of this holiday. Past studies (e.g., Polonsky et al. 2004) suggest that males are primarily the ones with anti-Valentine feelings. However, as we saw in the examples above, there are some expressive females sharing a strong dislike and market resistance.

As the above consumer meanings suggest, there are direct retail recommendations that stem from each of the key consumer-stated meanings of actions related to this holiday. We develop many of these recommendations in the following section, best retail practices.

**RQ2: What are the best methods for retailers and e-tailers to use (in order to shape consumer expectations and experiences) for this holiday?**

With a better understanding of consumer meanings, we now share best practices related to the holiday in the areas of: 1) e-tail, 2) shopper procrastination, 3) inventory management, 4) atmospherics and in-store displays, 5) advertising and integrated marketing communications (IMC), 6) pricing, and 7) value added strategies.

**Table 4.4: Best Practices: Intuitive and Unique Consumer and Retail Insights**

Area	Intuitive	Unique Insights
	-the Internet serves as a reminder of the holiday [C] -non procrastinating consumers use the Internet to purchase Valentine's gifts [C]	-the Internet is a primary outlet for Anti-Valentines venting and communities [C] -consumers go online for Valentine's gift advice [C]

<b>1) E-Tail</b>	<ul style="list-style-type: none"> <li>-consumer benefits of e-cards include instant exchange, free, interactivity, and personalization [C]</li> <li>-Valentine's Day demands a distinct e-tail presence [R]</li> <li>-use multi-channel (i.e., retail and e-tail) approach [R]</li> <li>-e-cards have replaced in store card-kiosks [R]</li> </ul>	<ul style="list-style-type: none"> <li>-e-gifts exchanged on this holiday include e-gift certificates, photos, online dedications, websites [C]</li> <li>-consumers send free e-Valentines primarily for non-romantic relationships or as a supplementary gesture to an offline card [C]</li> <li>-e-cards as a primary Valentine card to a romantic partner is poor netiquette [C]</li> <li>-consumers use e-cards to attach e-gift certificates</li> <li>-consumers schedule e-cards to be sent up to a year in advance to ensure the holiday is not forgotten [C]</li> <li>-e-tailers must incorporate offline ways to handle glitches and delivery of e-cards and e-certificates</li> <li>-expedited shipping is a main concern for this last-minute holiday [R]</li> <li>-use technological trends and counter-trends [R]</li> <li>-provide and store online gift recommendations for specific gift recipients [R]</li> </ul>
<b>2) Shopper Procrastination</b>	<ul style="list-style-type: none"> <li>-it is a last minute shopping holiday [R]</li> <li>-men procrastinate Valentine's shopping [R]</li> <li>-be prepared for last-minute shoppers [R]</li> </ul>	<ul style="list-style-type: none"> <li>-connect with consumers' negative meanings [C]</li> <li>-expand the Valentine's retailing season [R]</li> <li>-smooth transaction from holiday season [R]</li> <li>-feature the holiday earlier in the season for competitive advantage [R]</li> <li>-latest buying season of any holiday [R]</li> <li>-bulk of sales come approximately three days before the holiday [R]</li> <li>-some customers come back a couple of times throughout the season and buy ahead [C]</li> <li>-consider the day of the week [R]</li> <li>-consumers feel this holiday is too rushed after the Christmas/Chanukah holidays [C]</li> </ul>

		-remind consumers to come back for Valentine's Day [R]
<b>3) Inventory Management</b>	<ul style="list-style-type: none"> <li>-customers consistently seek classic Valentine's gifts [C]</li> <li>-consumers often seek to give and receive services in addition to tangible gifts for this day [C]</li> <li>-males are traditionally the primary target market for this holiday [R]</li> <li>-buy inventory via past years benchmarks [R]</li> <li>-stock inventory appropriate for traditional romantic relationships [R]</li> <li>-retailers help consumers express love with various products [R]</li> <li>-current trends lean buyers away from the traditional pieces and towards more individualistic selections [R]</li> </ul>	<ul style="list-style-type: none"> <li>-shoppers seek "us-gifts" - gifts intended for the couple [C]</li> <li>-shoppers look for different goods depending on the length of their dating relationship or marriage [C]</li> <li>-singles desire goods catered to them for this holiday [C]</li> <li>-some females seek self-gifts on this day [C]</li> <li>-recognize female gift-givers [R]</li> <li>-stock more gifts appropriate for men during the holiday [R]</li> <li>-stock inventory for alternative and non-romantic relationships [R]</li> <li>-carry certain products that fit the romantic love, the friendship of love, and the child-parent love [R]</li> <li>-carry merchandise with respect to the fact that Easter is approaching [R]</li> <li>- carry pieces of Valentine's collections as a way to sell classic gifts and a unique overall collection [R]</li> </ul>
<b>4) Atmospherics &amp; In-Store Displays</b>	<ul style="list-style-type: none"> <li>-consumers associate icons such as Cupid, hearts, bow and arrow with this holiday [C]</li> <li>-consumers associate red, pink, and white with the holiday [C]</li> <li>-retail atmosphere puts some shoppers in the mood [R]</li> <li>-use of music and visuals complete the shopping experience [R]</li> <li>-give the holiday front of store focus [R]</li> </ul>	<ul style="list-style-type: none"> <li>-non-traditional Valentine's décor attracts unique attention in store displays [R]</li> <li>-run the theme throughout the store [R]</li> <li>-allow for quick shopping by providing visual cues (e.g., signs to the appropriate gift sections, cards) [R]</li> <li>-display cards that feature a visible headline to attract shoppers [R]</li> </ul>
<b>5) Advertising &amp; IMC</b>	<ul style="list-style-type: none"> <li>-advertise a featured Valentine's gift [R]</li> <li>-incorporate a celebrity endorser [R]</li> <li>-suggest benefits of proposing, renewal of vows on this day [R]</li> <li>-realization of the importance of word-of-mouth marketing [R]</li> </ul>	<ul style="list-style-type: none"> <li>-retailers should play the role as a reminding friend [R]</li> <li>-incorporate romantic music/featured musician(s) into the IMC strategy [R]</li> <li>-advertise the value of a lasting gift in addition to a fleeting (e.g., flowers) gift [R]</li> </ul>

	<ul style="list-style-type: none"> <li>-training the sales force on appropriate gifts for the particular relationship as well as promoting suggested gifts and presentations [R]</li> </ul>	<ul style="list-style-type: none"> <li>-suggest appropriate gifts [R]</li> <li>-encourage self-gift giving [R]</li> <li>-promote utilitarian nature of cards (e.g., as a necessary component to the gift) [R]</li> </ul>
<b>6) Pricing</b>	<ul style="list-style-type: none"> <li>-shoppers are less price sensitive just before or on the holiday [C]</li> <li>-offer selection of prices ranges on quality products [R]</li> <li>-keep price congruent to the quality of the good [R]</li> <li>-cater to the most common price expectation [R]</li> <li>-maintain stable prices for non-seasonal gifts to signal stable value (e.g., in jewelry) [R]</li> <li>-keep stable prices or even raise prices for items that are not specific to Valentine's Day [R]</li> <li>-recognize the role of price along with how much time is left before the holiday [R]</li> <li>-lowering prices for Valentine's specific goods during the final shopping times to enable less overstock [R]</li> </ul>	<ul style="list-style-type: none"> <li>-guilty last-minute shoppers often spend more [C]</li> <li>-buyers purchasing for an anniversary or birthday spend more [C]</li> <li>-shoppers' common price expectation is \$100 [C]</li> <li>-shoppers do not look for "sales" during this holiday as compared to other holidays [C]</li> <li>-sale gifts (e.g., for a spouse) signal a feeling of guilt, shame, and/or cheapness [C]</li> <li>-non price promotions (e.g., loyalty programs) entice shoppers who don't seek "sale" gifts for this holiday yet seek some incentive or value added [R]</li> <li>-put price in perspective to the most common gift- a dozen roses (which do not last) [R]</li> </ul>
<b>7) Value Added Strategies</b>	<ul style="list-style-type: none"> <li>-buyers seek extra non-price incentives to purchase [C]</li> <li>-add-ons with purchases (e.g., flowers, card, gift wrap) save the consumer time [C]</li> <li>-personalization is a form of value-added [R]</li> </ul>	<ul style="list-style-type: none"> <li>-buyers often expect free gift wrap with purchase during this holiday [C]</li> <li>-buyers seek individualized gifts with engraving and extra customization to the purchase [C]</li> <li>-most common personalization requests during this holiday include names, dates, "I love you", and "Valentine's Day 2005" [R]</li> <li>-provide add-ons (e.g., flowers, card) with purchase without sacrificing the quality of the purchased gift [R]</li> </ul>

\* [R] - retail insight; \*\*[C] - consumer insight

## E-Tail

The e-tail environment contributes to shaping consumer expectations and experiences for this holiday with its own best practices. Valentine's Day entails a distinct online presence on the search engines; for examples, Google adapts its logo to be laden with red hearts, while MSN changes the entire site background to a Valentine's theme. Recall that consumers are likely to go online to share their feelings of euphoria and love (or disappointment and hate) brought about by this holiday. However, consumers also go online to send virtual Valentines, to seek e-gift giving advice, and to search and shop for gifts.

*Virtual Valentines.* E-tail has a role in Valentine card exchange. A common ritual (especially among grade-schoolers) is the card (i.e., Valentine) exchange. Children often exchange small, packaged cards featuring the latest superhero, pop star, or cartoon. In an egalitarian process, the children enclose candy hearts, sign and exchange Valentines with every classmate. However, this ritual changes with age. By middle school, it is generally understood that a Valentine is reserved for special relationships. By young adulthood and adulthood, as we focus on here, the cards themselves often get bigger and the message gets deeper.

The emergence of (often free) online greeting cards has inspired some to send virtual Valentines. The trend of "make your own card" kiosks in some retail locations has been replaced with e-card websites. On these sites (e.g., Hallmark.com; Bluemountain.com) shoppers select a virtual Valentine, add a personalized message, gift certificate and e-mail message. Most informants feel that sending a Valentine to a romantic partner via the Internet is poor netiquette. However, virtual Valentines are more

appropriate as a supplemental gesture or for family members and friends. They are commonly shared among single friends. A greeting card executive points out the impersonal aspect of e-cards for this personal holiday:

We have free e-cards for a thinking-of-you type thing. Smart people do not only give an e-card to their loved one!!! But what some do, is get a serious paper card and send a funny e-Valentine at work to let them know they are thinking about their loved one. But that does not replace the paper card that you have to give. [R]

Another retailer agrees that e-cards are not substitutes for the real thing:

There are appropriate occasions to send e-cards and it's more about "thinking of you" or "thank you" or "good luck". Maybe an occasional birthday for that long-lost friend that you don't keep that close of contact with, but there is something tangible about receiving a greeting card in the mail or being handed a card as opposed to online. It becomes impersonal if you send an online card. We thought it (online card sending) was a threat, but it really isn't. Actually, people who send e-cards are card-enthusiasts. It's almost as if it's encouraging them to think about sending cards more often. It actually helps us, not hurts us. [R]

Interestingly, this form of virtual exchange does not seem to have affected offline card sales for this retailer. The virtual Valentine exchange supplements, not replaces, offline card exchange for primary relationships and represents a gesture that may not have called for a card in the case of secondary relationships.

E-tailers have the ability to electronically remind consumers about the holiday. At the same time, the consumer can schedule when the card will be sent. This creates a clever back-up strategy, because the software will not forget the day, even if the consumer does. One retail executive notes how the auto-scheduling is a key benefit to sending virtual Valentines:

We have a reminder service with our website. It is great for people like me who have a hard time remembering. It is not that I don't care- it's that I don't remember. It is set up as a reminder so it will send me an email the



week before, or however long you need, and say, “Hey don’t forget Valentines Day!” [R]

*E-Gifts and Advice.* Some consumers choose to share gifts, virtual or not, via electronic means. For example, informants send e-gift certificates, photos, or online dedications. In addition to using e-commerce to purchase and send gifts, browsers exchange gift advice on their own personal sites, as one woman explains:

[You can] create an online dedication for your loved one. [Boyfriend’s name] animated some of our photos to make a moving story of us. He also created a Valentines card online and sent me an e-mail that looked like it was from American Greetings.

In return, she created sites for her loved one so that he could think of her while they were apart:

I created a couple of sites for [Boyfriend’s name] when he went away for the week. The opening page had the days of the week so each day he could click on a button and be taken to somewhere fun. One day I wrote him a poem. The next day I linked to a cute e-card. Another day I created a picture story of graphics. [The site has] graphics of people of every hair and skin color so you can find ones that look like you and your loved one. I recommend the “summer at the beach” set, as the characters are rather scantily clad and in suggestive poses. [F, Online 3-4-04]

Some e-tailers see a business opportunity associated with the custom websites that can be sold. While online shoppers discuss using the Internet to share advice and virtual gifts, retailers generally focus on gifts actually purchased via traditional e-commerce means. As one e-tailer clarifies, his company sends actual flowers and not trendy “virtual bouquets”:

There are a couple of things that we do with our website. We do have gift products on there so surfers can send their loved ones gifts, primarily flowers, for Valentine’s Day. Real flowers— not virtual flowers! [R]

E-tailers help those online shoppers who want to let their loved one select something special by featuring e-gift certificates. One e-tailer explains how their company currently incorporates e-gift certificates into their strategy:

We have gift certificates available online. We own a company called Gift certificate center.com, where you can get gift certificates to about 400 different retailers, dining establishments, entertainment venues—that kind of thing. You can either attach that gift certificate to an e-card or you can send it to through the mail. So we have the online opportunities for gift certificate giving as well. It's been pretty successful for us. Most of what we see on our website is attaching ten or twenty five dollars to an e-card. It's not necessarily a main gift. It's more of a secondary gift. You can spend those e-certificates at various locations—not just our stores but at restaurants, other retailers—even Home Depot! Consumers can split them up too. If you give them a twenty-dollar gift certificate, they can spend ten dollars at channel A and ten dollars at channel B. [R]

E-tailers are still developing best practices in this area. One e-tailer describes a glitch:

We sent our own secretary an e-card with a gift certificate and it got screened out in our own e-mail! It ended up in junk mail. We had to call in to find out if she had gotten it, and then ask them to send it in another form so she would get it. [R]

As another paradox of technology, e-gifts and virtual Valentines seem to provide value, but at the same time, foster loss. Personalized online gift recommendations may provide additional value for retailers and online shoppers.

*Online Gift Recommendations.* Consumers have access to impersonal spheres of influence to derive product information and recommendations. These type of information sources influence consumers' online product choices more so than conventional (i.e., offline) recommendation sources (Senecal and Nantel 2004). These e-tailers often assume the buyer is purchasing for him or herself. E-tailers should consider adding a feature where e-shoppers can designate who the gift is for and make recommendations

for future purchases for that gift receiver (e.g., You purchased *Sex and the City*, season six for Jenna on March 1<sup>st</sup>, may we suggest the trivia game?). It is of further importance to recognize that personalized product information and recommendations on the Internet come from other consumers (e.g., in online diaries, chatrooms, dating sites, epinions.com) just as much as from e-tailers' suggested purchases. Furthermore, expedited shipping options are important for the procrastinating buyers for a last-minute gift holiday.

### **Shopper Procrastination**

This is a last-minute holiday for retailers as well as for shoppers. With little to no time to recover from Christmas and New Year's, a smooth transition must be achieved with disposal and set up:

Managers are getting their merchandising displays up and meanwhile, trying to figure out what to do with their Christmas cards that didn't sell and get their sale displays in the back of the store. So it is really just transitioning from one holiday to the next. [R]

Retail strategies may revolve around an expansion of the Valentine's season and a consideration of the day of the week that the holiday falls.

*Expand the Retailing Season.* We find that the Valentine's Day "season" has progressively lengthened. While beginning as just one day (i.e., the Ides of February), today the holiday lasts for days—or at least through the nearest weekend. This expansion is also apparent in the retail set-up.

We tend to put Valentine's Day out very early, basically after Christmas we have our post-Christmas sale and as we transition into January we are getting displays up. At this time, we target customers with different messages—keeping New Year's resolutions, getting connected, reaching out, or getting organized with all

the relationships you have in your life. But when they come in the stores (in early January), it is *all* about Valentine's Day.

Retailers that feature the holiday earlier may have a competitive advantage. Along with the expanded planning for and celebration of (or counter-celebrating) this holiday, retailers should expand the time frame that related products and services are offered. Shoppers have a short window to be reminded of and to purchase Valentine's related items. One strategy is to remind Christmas/Chanukah gift purchasers to return for Valentine's:

We start telling the guys about what we are doing for Valentine's Day at Christmas when they are here picking gifts up. We remind them about Valentine's then. [R]

However, many companies focus promotions just before the holiday. For example, Victoria's Secret airs a live fashion show to introduce its Valentine's Day line on February 6<sup>th</sup> (approximately one week before the day). Advance promotion and retailing, in addition to last minute promotions, would allow gift-givers (self-givers included) more time to contemplate and customize their purchase and presentation of the gift.

Some consumers strive to make appropriate purchases earlier in the season, and "best customers" browse and come back a few times before making a purchase.

One retailer notes advance browsing and purchasing especially from female customers:

Our best customers that frequent our stores quite a bit, usually women, will come back a throughout the season and buy ahead and plan their card sending needs. In terms of getting closer to this season, that is when you see the more infrequent customer. Towards the *very* end—that's where you will see men come in. Men don't shop our stores very often. The few times we get them in during the year, Valentine's is definitely one of them. So if you are in a store a couple days before, you see the men coming in trying to find that right card. The last couple of days can get a little crazy with people trying to cram into the card line to find the right Valentine. [R]

Despite the customers who do shop early, retailers note that Valentine's Day has the latest buying season of any holiday. Most buyers purchase just days before the holiday. One retailer shares that the bulk of their sales consistently peak three days before the holiday. Thus, retailers have the challenge to provide for early shoppers, while still being prepared and stocked for last-minute shoppers.

*Consider Day of Week.* The day of the week is an important consideration for retailers. One retail executive explains this phenomenon:

Some of the on the way home from work buying has really helped our weekday sales. The Monday day hurts us because couples might go to dinner and celebrate the holiday on the Saturday before Valentine's Day. They are already done; they have already celebrated, so why bring a gift home on Monday? [R]

Retailers are in agreement that Monday is the worst day for the holiday, and many retailers see Friday is the optimal day of the week (e.g., in terms of sales). One retailer thinks through possible scenarios from a consumer perspective:

The day of the week is very important. Ideally, you plan to go out with your spouse on the weekend. So if Valentine's Day is a weekday, I bring her a card to show I haven't missed the day. And then we go out to dinner on Saturday. If Valentine's Day is a Saturday, then I can skip the card because we are going to dinner! You get your flowers, you know I remembered, you get your dinner, we are celebrating, and I skip the card. [R]

This retail executive recognizes the holiday twice when it falls on a weekday. Retailers may be interested in an expansion of the length of this holiday and the associated retail season.

## **Inventory Management**

Retailers should consider a broader scope when planning inventory and product offerings. Most retailers associate this holiday with the celebration of a romantic

relationship and males shopping last minute for gifts for their female partner.

However, as consumers state, this holiday encapsulates a spectrum of meanings.

Retailers who only offer inventory appropriate for traditional romantic relationships are likely missing out on potential sales. Specific recommendations for retail that we will discuss here include: a) promote importance of alternative and non-romantic relationships, b) recognize female gift-givers, c) modernize classics, d) think ahead to Easter, e) bundle with services, f) feature “us-gifts”, g) provide goods for various relationship lengths, and h) remember the singles.

*Promote Importance of a Wider Array of Relationships.* Consumers celebrate various relationships for this holiday. Although informants most frequently celebrate heterosexual romantic relationships for this holiday, consumers celebrate many types of relationships. Retailers can especially promote purchasing and carry inventory appropriate for parents, siblings, and grandparents, homosexual relationships, friends, and even pets as informants mention these important relationships for this holiday.

The inventory should reflect that this holiday celebrates more than traditional romantic relationships. As one retailer notes, the holiday is becoming broader:

Valentine’s is getting bigger and bigger in terms of reflecting on more than romantic love. Not as many moms are able to stay home with their kids, so it’s a way to tell your kids you love them. People are seeing the aging of America. It’s a way for people to tell their parents they love them too. And friends. People become so time-sensitive or time-impooverished that it’s a chance to reflect on the friendships that are really important. Because you aren’t able to have as many friends when your family has been so busy. It’s broader than just romantic love. Romantic love is still obviously the top priority, but there are other relationships that are important to celebrate within the context of Valentine’s Day. [R]

Retailers help individuals express love, a key meaning of this holiday, with the products they offer. However, many traditional products are only appropriate for certain

types of relationships celebrated during this holiday. One retailer describes what customers frequently buy and the appeal of those gift categories for different kinds of relationships:

We know what customers buy. It really comes down to plush, candy, and balloons. We don't carry flowers, so some of our stores will bring seasonal flowers in. But that's really what the customer is looking for and I think that it's partly because those categories are broad. For example, plush may be for young love between a younger couple, but it also might serve the need if a father or mother is looking for something for their child. So you get that universal love approach. There are certain products that fit the romantic love, friendship of love, or child-parent love. The execution of the product is refreshed year to year. It's different, but in terms of what we offer the consumer (an expression of love), is pretty consistent from year to year. [R]

*Recognize Female Gift Givers.* Females buy for their boyfriends or husbands and are frequent buyers for non-romantic relationships. Many females discuss purchasing for their friends and family. On the other hand, not one male mentioned exchanging a gift with male friends and relatively few males discussed buying gifts for their family. Retailers can recognize the substantial female gift giver market in addition to the traditional male target for this holiday.

Because the holiday is expanding to the celebration of family and friends (including males), a best practice incorporates stocking a selection of men's gifts appropriate for the holiday. This is a best practice due to the findings that: a) females do feel obligated to purchase for their male partner (although to a lesser extent than males) and b) males do expect a gift(s). Yet, retailers discuss the challenge of providing masculine or male-appropriate gifts:

It is always harder to find something for the women to buy the men, than for the men to buy the women. It is always more limited when the women are looking for the men. Money clips, watches, cuff links. We don't offer as many mens' gifts

during Valentine's. It has got to be reciprocal somehow (laughs). Some women buy some things, but of course the emphasis is on the guy buying for the woman. Women buy for men too! [R]

While the above statement "women buy for men too!" seems somewhat intuitive, we note that most retailers inherently referred to males as the purchasers and frequently did not refer to women as the shopper/gift-buyer at all during the depth interviews. In-store observations confer that male-oriented gifts are far and few between. This scarcity may contribute to givers making or improvising on gifts to males.

*Modernize Classics.* One best retail practice involves paying attention to fads and trends as well as the classic gifts. For example, heart jewelry is a classic gift; however, current trends favor more individualistic expressions:

Over the years heart jewelry has been so popular. We gather hearts from all over the store and put them in one place. You would think that it would be the heart thing every year so we buy a few hearts—but we will still have them the day after Valentine's. [R]

Customers gravitate towards fresh ideas—such as collections. Some customers add to a collection that they have started for a loved one. Another buying strategy is to mix classic with modern. For example, buyers purchase a classic gift in a newer style each year.

One customer, for instance, annually challenges this retailer to provide original heart jewelry:

We have one customer who has come to us for twenty years, and *every year* he buys his wife some sort of jeweled or stone heart. We are really struggling at this point to come up with hearts made of different stones! We have this list of what he's already bought and anytime we are at a gem show we are looking for a new style that he doesn't have. His wife must have the world's largest collection of heart jewelry! [R]



Although the gift category is traditional, the gift recipient's entire collection is one-of-a-kind. Retailers can suggest that customers start a collection for their loved ones, or upgrade an extant possession. These strategies may encourage customer loyalty. At the same time, the customers' decision to add to a collection may reduce consumer anxiety and retail resistance.

*Think Ahead to the Next Holiday.* Another best inventory and product practice emphasizes forward thinking about inventory in terms of the next consumer holiday (here, Easter). For example, one clothing retailer takes these holidays into joint consideration when ordering his spring line:

For Valentine's Day you want to carry red clothing and sexy dresses. I have different vendors that I ask, "do you have some sexy things for Valentines?" You definitely want to stock differently for the day, but you don't want to stock too much because you will be stuck with it. Then for Easter the women are going to church dressed up. You have to stock conservative dresses—dresses you can wear to church. You definitely want to do your buying differently around certain holidays. There's no question about that. [R]

Consistent with findings from the group interviews, this retailer notes that women generally purchase sexier clothing (and accessories e.g., lingerie, shoes) for Valentine's Day and more conservative clothing for Easter. Clothing and accessory retailers may take this difference into consideration for inventory decisions. Other inventory specific to the holiday (e.g., heart-shaped chocolate) similarly can not be easily adapted for Easter sales. By carrying more universal products and packaging (e.g., a generic plush animal, chocolates in pastel foils), retailers may prevent overstock, as such inventory is not limited to just one holiday.

*Bundle with Services.* Retailers and e-tailers have an opportunity to serve customers by bundling their products with certificates for related services. Service

providers with a retail component (e.g., spas) can do so without partnerships, while traditional retailers can partner with selected service providers for this holiday. Such enables buyers to exchange something permanent and tangible along with something experiential. An example is bundling a massage certificate with a romantic DVD. Many of these services may be used as an “us-gift”.

*Feature Us-Gifts.* Not all gifts are just for the recipient, but are designed for the couple. Retailers can incorporate intimate us-gifts (e.g., romantic getaways, candles, aphrodisiacs, bubble bath, scented oils, lingerie, satin sheets) with this holiday. Such us-gifts are in a sense for the receiver, but may enhance attractiveness and the relationship as well.

*Provide Products for Various Relationship Lengths.* Recall, we find that relationship length is an important factor for Valentine’s gift exchange. Perceived purchase obligations are highest among those in a new relationship; however, relatively less consumers in a new relationship actually purchased for their partner. Different products are more appropriate for different relationship lengths, so it is important for retailers to promote plush as well as platinum for shoppers in various relationship stages.

*Remember the Singles.* Retailers can alleviate some of the negative feelings experienced by singles. For instance, retailers can provide gift registries for singles, hold singles promotions, encourage guiltless self-gift giving (e.g., “the right hand ring”), and even offer a line of products devoted to singles (e.g., “proud to be single”). Rarely, if at all, were singles mentioned as part of the retailers’ strategies for this holiday.

## Atmospherics and In-Store Displays

In-store decisions about atmosphere and displays are important because many shoppers report impulse purchases. Specific retailing recommendations include: a) set a Valentine's atmosphere, b) incorporate synergy with senses, c) remind and attract with in-store displays, d) consider the fanny factor, e) provide in-store visual cues, and f) headline cards.

*Set a Valentine's Atmosphere.* The retail atmosphere puts some shoppers in the mood to buy for the holiday, as one retailer illustrates:

Last year we went all out. We did very well. We put a bunch of balloons that said, "Kiss me" and "hug me" all over the store. We also got some red flowers for the store. We put balloons out and had flowers and candy and that really helped. So we made it very festive and it gets people in the mood. [R]

The setting described above contributes to a positive and warm retail atmosphere that reinforces many consumer meanings of the holiday. Other best practices include featuring softer lighting or candlelight, incorporating scents of chocolate, displaying roses, and keeping the store at a comfortable temperature. Genuinely happy retail environments seem to reflect positively on shoppers. Such an atmosphere may contribute positively to retail employees' demeanor and customer service provision. As one executive notes, the holiday is an opportunity and an excuse to create an especially inviting retail atmosphere:

Valentine's Day is so nice to have. It gives us some excitement. We enjoy doing something special. We get to bring in flowers. We are so lucky because we are in a business where we deal with happy people and happy times. Working indoors around beautiful things and talking to nice people. It's a great job. [R]

From this retailer's perspective, the holiday is engrossed with is with happy shoppers and happy times. However, a substantial segment of individuals have anti-Valentine's sentiments—many of whom avoid the holiday and associated retailers during the season.

*Incorporate Synergy with Senses.* The use of music and visuals complete the shopping experience and contribute to the retail atmosphere. In-store radio and television each provide a way to feature some of the romantic music associated with the holiday as well as messages of love, warmth, and giving gifts that are available in the respective store.

In Wal-Mart's in-store radio, you can hear our commercials and music play in the background. We sponsor other messages to remind the shoppers of the holiday and what they can buy of ours at Wal-Mart. They also have the in-store TV that we use. [R]

*Remind and Attract with In-Store Displays.* It is important for the holiday message to be apparent from the outside in order to remind and attract passers-by. Potential buyers can be also be reminded with displays as they enter. One retailer refers to this important strategy as the "front-of-store focus":

We give Valentine's products what we call our "front of store focus". We use signs window banners, and seasonal islands. That first display hits you right as you walk in the door! [R]

With this display approach, it is difficult for the shopper to "forget" to purchase for this holiday. In-store display decisions should supplement the retail atmosphere. Typically, in-store displays feature traditional icons such as Cupid and his bow and arrow, hearts, and other symbols of love.

We put out a lot of red hearts and paper Valentine's around the store. We put red Hershey's kisses in the display case and across the store. We really get across the Valentine's message. We run the theme throughout the store. The showcases out front really give us a chance to highlight the themes. We don't leave very

expensive things out at night so we don't put expensive things in those showcases because then at night, there is nothing to look at when you go by the store. So we showcase something interesting to catch people's attention as they walk by. [R]

One owner shares her success with adding creative additions to her in-store displays and windows:

We have some pretty, red velvet, cushy little boxes that we bought for display because they are so cute. We just get eaten up with cute. We have these little frogs that (Interviewer: Frogs?!) Yes, Valentine's Day frogs. There is this great company that sells these wonderful display decorations. They have a lot of off the wall animal motifs. So we bought these little dressed frogs and they do all kinds of things! [R]

The use of non-traditional icons in display adds consumer interest and may appeal more to the shoppers who are nauseated by the typical pink and red hearts and cupid. Aisle endcaps further ensure that the consumer will not miss purchasing opportunities. One retailer describes how the items featured in endcaps sell in particularly high volumes:

During the Valentine's season, we display a picture of the season on an endcap at the end of the aisle. Those items sell in high volumes. It blows our competition. That end-of-aisle real estate is very sought after. [R]

*Consider the "Fanny Factor".* It is also smart for retailers to consider the "fanny factor". Some displays are set up in a way where shoppers are crowded and bump in to each other. Such crowding causes some shoppers to avoid that display or retailer during this time. To help overcome this problem, one retailer shares his company's strategy to provide more room near the displays:

We use a seasonal out post. This is a stand-alone display that we set up towards the end of the Valentine's season. The strategy here is intercept and overflow. Early in the season we put it in a place where the consumer is going to practically trip over it to remind them to think, "oh yeah, I need a Valentine's Day card." And later towards the end of the season, we use the display more for overflow. We talk about the fanny factor where we just have a lot of people in front of the display. It is three feet deep and consumers can't even get to the display and pick a gift. But if there is an outpost, then that just adds another four or eight linear feet of product. It gives customers more room to look and shop. [R]

Adding extra space for the "fanny factor" is particularly important during the final buying days.

*Provide In-Store Visual Cues.* A final best in-store practice incorporates visual cues to help customers during this often rushed holiday. Many Valentine's Day buyers don't want to spend much time in a store. Shoppers seek visual cues to help them locate their gift(s) of choice. Especially on this intimate holiday, buyers want to check out *without waiting*. One buyer discusses how he waits to buy his gifts after midnight, partially to avoid the long lines. Retailers who target men should realize that men might react very negatively to even an expectation of waiting (Grewal, Baker, Levy and Voss 2003). Grewal et al. (2003) find that men react more negatively in terms of wait expectations than women under the same environmental cues, and thus are less likely to shop with that retailer.

Shoppers, especially those new to gift-giving for this holiday, do desire salesperson expertise (or at least access to salesperson expertise). For greeting cards, however, shoppers do not typically desire sales assistance. When approached while card shopping for this day, shoppers typically decline assistance (and some are somewhat bothered). An organized and well-communicated retail set-up provides customers a way to find where they need be without interacting with an employee.

*Headline Cards.* Display considerations for greeting cards are important. The headline of a greeting card serves to attract card-shoppers or passers by. Similar to the role played by a newspaper headline, the top statement on the cover of a greeting card signals either “pick me up” or “keep shopping”. Men especially scan for key words, so it is important to feature these functional words on the top of the card (e.g., “For Mom on Valentine’s Day”; “To My Loving Wife”). Cards on the cover with excessive blank spaces on the top almost never sell very well.

## **Advertising and Elements of IMC**

Retailers focus on advertising and other elements of integrated marketing communications (IMC). Best practices include: a) promote featured gifts, b) advertise the value of a lasting gift (and relationship), c) promote engagements, d) use a sales force trained for this unique holiday, and e) foster positive word-of-mouth marketing.

*Promote Featured Gifts.* A best practice is to promote a featured gift. This strategy brings in customers to the particular store for a gift they can only purchase from that retailer.

Consumers are coming into our stores for the selection of greeting cards and while they are here, then they see those gifts. We have some television advertising focusing on key gift items and that helps drive them in specifically for those items.  
[R]

One example of a featured gift is a CD that is integrated into various aspects of the campaign:

For Valentine's Day 2005, we will be featuring a CD by a famous singer that we are going to promote on the radio. We do TV. We do print. We do newspaper and the Sunday inserts- the Parade. We may do other radio but a lot of times it is with a mass channel chain like Walgreen's drug stores. The displays are all through the stores. We do direct marketing as well through our consumer database. We will send e-mail as well as snail-mail postcards with offers about our promotional items. [R]

Romantic music is a good choice as it can also be played in-store and may serve as a background for Valentine's television and or radio spots.

*Advertise the Value of a Lasting Gift (and Relationship).* Another best practice involves advertising the value of a lasting gift with the idea of fostering a lasting relationship. This strategy can be combined with promoting immediate consumption gifts (e.g., flowers, chocolate, wine). Promoting the idea of giving the present for the future enables the retailers to suggest complementary (rather than competing) gifts. One retailer specifically illustrates this point:

Advertising is the first thing we consider outside of making we have appropriate gifts in the store for them to purchase. For Valentine's, we usually advertise that jewelry is a lasting gift- not like flowers or candy, which are two other traditional gifts that are used up after a short period of time. But jewelry is something that lasts- we concentrate on that. [R]

*Use a Sales Force Trained for this Unique Holiday.* With respect to personal selling, Valentine's poses a unique challenge. One best practice entails training the sales force to recognize and suggest appropriate gifts for a particular relationship. For example, gift ideas may emerge from understanding the type (and length) of a relationship or understanding shoppers' stated preferences. A trained sales force may be especially effective for a young male shopper who sometimes is quite confused about this holiday. Many male shoppers (especially in newer relationships) have little idea about what to buy, and are further confused about what is expected from them. While



frustrating to some sales personnel, helping less experienced shoppers may entice the gift giver to return as he or she matures into a more suave gift giver. One retailer shares his frustration:

It's *impossible* to help young men with buying their girlfriend something. I've gotten to where I don't even try because it drives me crazy! Guys generally, young guys, don't really know how to give good gifts. They are still young and aren't really suave yet. When they get older, the married men are a little more suave so they know how to get better gifts. [R]

Retailers may make explicit suggestions or guidelines to assist wary shoppers in the gift giving process. They also may assist uncertain gift givers by training salespeople to ask pointed questions and then providing specific suggestions.

*Foster Positive Word-of-Mouth Marketing.* Fostering positive word-of-mouth marketing (WOM) is an influential yet often overlooked tool. One executive discusses the importance of WOM:

We are featured in many magazines. Local, regional, and we also do some co-op with Bulova and other companies in some national magazines such as *Time*, *Newsweek* and we are listed in some of their advertising. But we see a *lot* of word of mouth around this holiday. Word-of-mouth effects purchase behavior much more than radio, print, TV—any of that. [R]

Just as in many markets, positive WOM is important. However, it is especially crucial during gift shopping times.

## Pricing

Many best practices are price related. Specific recommended practices include: a) put prices in perspective, b) beware of the “Valentine's Day Sale”, c) offer price-promotions and loyalty programs, and d) consider price sensitivity versus the cost of overstock.

*Put Prices in Perspective.* One best practice is to offer a selection of price

ranges while keeping the price congruent to the quality of the good, as this retailer does:

We have a lot of really pretty things in every price range. We don't have a three hundred dollar version of a ring that when done well and beautifully would cost eight hundred dollars. Because that would be a poor product. The stones wouldn't be good, the metal would be thin, or the craftsmanship would be crappy. We do have something that in its great version is three hundred dollars. It's not the eight hundred dollar ring for three hundred dollars. The eight hundred dollar ring is eight hundred dollars. But we have a great pair of silver earrings with a semi-precious stone for fifty-two dollars. We don't have a pair of gold and diamond earrings for fifty-two dollars. Other places do and they are crap. What we do have is a great selection of good-looking things keyed into today's look. We have nice materials and products for reasonable prices. And if you look through our catalogue and stores, there's great-looking jewelry for under fifty dollars. Which is in most men's price range for this holiday. A bouquet of roses is that or more. [R]

It is interesting that this retailer puts the price of the good in perspective to a bouquet of roses while reminding shoppers that, unlike roses, jewelry may last as long as the relationship. Catering to the most common price expectation is another best pricing practice seen here. For shoppers, one hundred dollars is often an upper range for a Valentine gift, according to our survey and the National Retail Federation's 2004 Valentine's Day Consumer Intentions and Actions Survey. Of course, the price of the "average gift" has steadily risen in the past few years, (e.g., \$82.60 in 2001, \$88.80 in 2002, \$80.44 in 2003). According to one store owner, the price ceiling is important:

A lot of people look in one price range—usually around one hundred dollars. We carried hotdiamonds—a branded name of Sterling silver with diamonds. We sold a lot of those because it's in that price range. We market that a lot during Valentine's because it is something that people can afford. We highlight different items in prices that we think will sell well.

Nonetheless, retailers do not forget about higher-priced items:

We don't hide the more expensive things though! We still keep those out because there are always those who have Valentine's anniversaries and things like that on Valentine's Day. It is a very popular time to get married. We highlight what we want to for the holiday and still keep other things out as well. [R]

Valentine's Day is important for engagements and anniversaries. While shoppers like how doubling up for this holiday accounts for one less "obligated" gift day, retailers like how gift expenditures are generally much higher for such shoppers.

*Beware of "Sale".* It is a mistake to lower prices or to promote special sales for gift-oriented holidays, such as Valentine's Day. Many retailers keep stable prices or even raise prices for non-seasonal, high-demand items. One retailer describes a "Valentine's Day Sale" as a lure:

Plenty of stores have big sales for the holiday, and they think, "people are shopping, so we can lure them into our place with the sale". I figure, they are shopping anyway, our pieces are beautiful, you can't find them anywhere else, and we offer really good prices. We do fabulous Christmases and Valentines and have never even considered having a sale at those times of year. We are nice to people. We gift-wrap beautifully. We give good value with great service. [R]

Many other holidays are associated with special sales (e.g., Memorial Day, New Years); however, we find that the meaning of this holiday is not associated with the notion of a "sale". During this intimate, gift-oriented holiday sale gifts are often specifically avoided. For instance, purchasing the sale item for one's wife may trigger feelings of shame, guilt, or cheapness. As gift recipients share and discuss their gifts after the holiday, the recipient may not be proud of the sale gift (especially if the sale is widely advertised). One jeweler explains why Valentine's sales in the jewelry industry are not wise:

Its jewelry— there is no valid reason why something is twenty percent less today and regular price tomorrow. It's not like clothing where its spring now and those are winter jackets, and they aren't going to be in style next year so you've got to dump them. Jewelry is not seasonal. [R]

The practice of maintaining stable prices is particularly important for non-seasonal gifts.

*Offer Price-Promotions and Loyalty Programs.* Price based promotions and loyalty programs such as the one exemplified below do help to attract shoppers:

We send offers to customers who have our loyalty card. We target based on their purchase history or some item that we have that we are promoting for the Valentine's season. We allow the customer to earn money back in the form of coupons with their purchases. We send those coupons at an appropriate time based on when history has shown that they shop. We want to make sure that they have that coupon in their hand when they walk in the store. The coupon is in essence a gift certificate. Two dollars, five dollars, ten dollars- whatever it is- they can spend it on any product in our stores. And there is no qualifier. They don't have to spend ten to get two dollars off. We see a lot of these coming back. [R]

Although some informants state that they don't like to give a "sale" gift for the holiday, this principle does not apply to redeeming loyalty certificates to "purchase" a gift. Using a loyalty coupon is associated with a different mindset than buying a sale gift. From this perspective, a loyalty coupon is equated to money that has been "earned" by prior purchases.

*Consider Price Sensitivity versus Cost of Overstock.* It is important to recognize the role of price along with how much time is left before the holiday.

Guilty last minute shoppers translate to spending more. Price is a proxy for love—absolutely—especially with men. [R]

There is a difference in consumer behavior between if they are shopping early in the season or late in the season. When they are shopping early in the season it's all about finding a great product or getting just the right thing and getting a good value on it. When they are shopping late in the season, it is all about energy. Getting in and out quick, finding the right location on the way home—that kind of thing. Money is not as much a factor and they are going for the best thing they can find. And find it quickly! [R]

In other words, retailers notice and take advantage of changes in price sensitivity just as available shopping time evaporates. As a counter-trend, some retailers *lower* prices during the final days or hours to reduce inventories and overstocking. For example, the largest retailer in the country offers shoppers the lowest prices on February 14th. And, some shoppers await these price drops:

I always wait until midnight the night before and buy roses all at one time and deliver them to my family and girlfriends after they are asleep. Every year I do this, because after midnight Wal-Mart restocks roses and discounts what they have left for immediate sale the next morning. Not so sweet, but smart, huh? [M, Diary]

### **Value Added Strategies**

Retailers employ various strategies to add value to purchases. Specific recommendations include: a) offer a “free gift with purchase”, b) personalize and customize gifts, and c) provide wrapping options.

*Offer a Free Gift With Purchase.* Some retailers successfully offer a free gift with purchase during the season. Unlike general free gift offers, the strategies mentioned below are meant to provide a supplemental gift for the eventual recipient. One example of a gift to the customer is a handmade Valentine, as this store-owner describes:

We give out a hand-made flower pressed flower card with each purchase. Actually, my mother makes them. She glues a dried flower onto a little card, so it's a special gesture. We let the customer pick one that they like. [R]

Another gift with purchase is a bit more generous:

For seven years now we've bought fresh flowers in bulk from Flowers Inc. and make up our own Valentine's bouquets that we give away with each purchase. We make it easy for them. One stop to buy jewelry and no waiting in line at the florist. And our bouquets really are beautiful! They would sell for a lot of money. Even if someone spends fifty dollars, we give them a bouquet that would cost them fifteen or twenty dollars at the florist. If somebody spends significantly more, they get a significantly nicer bouquet. It is a great deal. We have great jewelry for thirty dollars so it's not like you have to spend five hundred dollars to get a free bouquet. [R]

It is interesting that this retailer adjusts the value of the free gift along with the purchase total, as other strategies generally offer a standard gift with a purchase at or beyond a certain price. The latter may entice the consumer to spend the minimum to receive the gift offer, while the strategy discussed here may actually entice shoppers to make a more expensive purchase to receive a bigger or more exotic bouquet for their loved one.

Although a free gift may increase the value of the purchase, consumers may draw mixed inferences about the brand offering the free gift and the gift offering itself (Raghubir 2004). Shoppers use price promotions as an information source to judge products and prices (Raghubir 2004). Consumers discount the value of the free gift and its category and impute the free gift value via the price of the offering brand (Raghubir 2004). Hence, we caution that while offering a free gift seems to be a source of value added for the shopper (e.g., in terms of time, convenience), the purchaser may question the financial value of the main item and thus reconsider making (or keeping) the purchase.

However, some value-added extras contribute to positive word-of-mouth marketing. One retailer recalls the success her store had:

I remember one year, one of the law professors came in first thing on Valentine's morning and went back to work holding this huge bouquet that we gave him with his purchase. Every law professor, about, came to us that year! [R]

Just as gift recipients show “one-upmanship” and informal gift competitions, here we see that the givers may seek inspiration from the gifts that their colleagues receive.

*Personalize and Customize Gifts.* Another value-added strategy is to provide free personalization purchases via engraving or other methods of customization. The vice president of one chain shares how his store makes almost every gift unique:

Most of what we offer is personalized giftware. Engraved, etched—some type of personalization. For Valentine’s Day, we personalize a lot of jewelry. With dates, messages or initials and such. They don’t buy a personalized gift for themselves. They are coming in to buy for the girlfriends, boyfriends, etc. [R]

Shoppers consistently state that, although they purchase generic gifts (e.g., heart shaped chocolate), they would prefer to provide a gift that is unique (just as the relationship is unique). One way to achieve this goal is to make a gift personally. However many feel uncomfortable making a gift after reaching a certain age. Providing a personalization service may help alleviate this problem as it provides a way to turn an ordinary mass-retailed item into a custom gift. However, too many options may create a state of frenzy during this short shopping season.

*Provide Wrapping Options.* Gift wrapping is another way to enhance uniqueness and perceived value (e.g., see McGrath 1989). Shoppers often expect free gift wrapping (e.g., for significant purchases). Male shoppers, especially, do not like wrapping gifts. As a counter-trend against formal gift wrapping, non-traditional gift presentations are emerging. As an extreme, some informants hand the gift over as is (with the price tag intact) if they can get away with it. As a more subtle example of this counter-trend, one informant rolled up a gift for his mother in newspaper. These examples show that some individuals need help in this area. Suggested ways for

retailers to help buyers with gift presentation include: a) promoting free gift-wrapping with purchases over a target price, b) selling tissue and gift bags near the register, c) stocking “presentation-ready products” (e.g., Crown Royal’s purple velvet pouch; Godiva’s gold box with red ribbon).

## DISCUSSION

It is important for retailers to understand consumer meanings associated with different holidays and how these meanings evolve. Here, we find that males especially appreciate help and suggestions from retailers during this holiday. However, as explained by resistance theory, some consumers resist this holiday and react by rejecting Valentine’s retailers and promotions. In this sense there is a consumer revolt against stereotypes and commercialism. This resistance may be related to a number of factors (e.g., relationship status, obligatory feelings, media and retail hype, heightened commercialism of the holiday, distaste for generic gifts). For some, Valentine’s Day is a time to be reminded of loneliness or a time of self-reflection and evaluation. It evokes a sense of obligation, self-loathing, and/or disgust for others. Consumers enact distinct rituals (e.g., hooking up with other singles, girls’ or guys’ night out, self-gifts) for their situations.

We stress the importance (and opportunities) for relevant retailers to take consumers’ market resistance into account in their decision making. Some consumers attribute negative feelings to the retailers and the marketing hype surrounding the holiday. Retailers can find ways (e.g., with humor) to reduce this dissonance or even incorporate



this resistance into their merchandise or communications. For instance, shoppers may connect with a satirical card or product (e.g., black candy hearts that satire the holiday). We provide a series of consumer themes and resulting direct recommendations for retailers (see Table 4.2). We further provide insight into seven distinct areas of retail recommendations (see Table 4.4). These tables show wide variety of managerial recommendations associated with consumer meanings.

### **Implications for Theory**

In the course of this paper, we have developed three main theoretical domains in the areas of materialism, monadic gifts, and market resistance (see Table 3). Recall, we made reference to each of these domains as they emerged in relation to the findings. For example, we propose extending materialism theories to include instrumental and terminal gift exchange (Table 4.3). We also propose extending the theory of self gifts to include us-gifts for a couple. Finally, we propose the extension of resistance theories to include market, retail, and gift resistance. These various contexts of consumer resistance are associated with a move towards voluntary simplicity, where consumers revert back to the private sphere, buy less pre-made goods, and willingly resist complex rituals. There has been literature focused on gift exchange, but not within the theoretical domains of resistance, materialism, or monadic gift giving. Thus, there is more that can be done with consumer rituals and the retailing aspects of this holiday and other gift-oriented holidays.

## Limitations and Directions for Further Research

The majority of empirical research on Valentine's Day presents a male perspective. Our study broadens knowledge about the holiday for various consumer segments and investigates what this holiday *means* to shoppers. These meanings have direct link to recommendations for retailing practice and strategy. However, we recognize some limitations of our research and offer suggestions for further research. Our study focuses on the holiday as it is practiced and understood in the U.S. Holidays are an aspect of a country's culture and because this holiday is practiced internationally, there is ample room for cross-cultural research. Future research should examine the Valentine's Day market in other parts of the world and address questions such as: a) what are the common Valentine's gift rituals and how do retailers participate in these rituals?, b) what are the various gender roles associated with the holiday?, and c) what are the best retail practices?

A second limitation is that we did not incorporate children into this study. Children are an important group concerning Valentine's Day. Children have "pester power" over their parents and may be highly involved with the trademarked cards and branded candy bought for the holiday. Interestingly, in elementary school, Valentine's is an egalitarian holiday. For instance, children equally exchange cards/candy for all (regardless of gender). How is it, then, that the holiday changes in the adolescent and adult years? How is it that Valentine's Day emerges as a female-oriented holiday? How can marketers revive the notion that this is a holiday for all?

Further research should focus on purchasing patterns and gift exchange associated with non-romantic relationships. Research questions may include: a) for which types of non-romantic relationships is a Valentine's card appropriate?, b) for which types of non-romantic relationships is a Valentine's gift appropriate, c) which types of gifts are appropriate for certain relationships (e.g., children, secretary, boss, mother-in law) on this holiday?, and d) in what ways can retailers best serve customers in the non-romantic relationships?

For some shoppers, the Valentine's gift expenditure is a proxy for love. On one hand, the giver strives to give a lavish gift in order to demonstrate depth of feelings of affect or love. On the other hand, an expensive gift could, at a conscious or non-conscious level, compensate for negative feelings or behaviors (e.g., guilt from not spending enough quality time with one's spouse). In light of these considerations, sales and price promotions are not an optimal strategy during this shopping season. This is one unique time when some consumers who embrace the holiday are willing or even looking to spend lavishly on their loved one(s).

We present this study as one that may serve as a platform for further retail-based research on this holiday (and other holidays). Holidays are times for both religion and secular celebrations; they appeal to consumers and retailers. Because seasonality and holidays are important aspects of retailing, we encourage researchers to extend theories related to holiday rituals along with the meanings embedded in these unique exchanges.

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CHAPTER 5

MARKET RESISTANCE AND VALENTINE'S DAY:  
A RE-EVALUATION OF RESISTANCE THEORIES<sup>11</sup>

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<sup>11</sup> Close, A.G. and G.M Zinkhan to be submitted to *Journal of Consumer Research*.

## ABSTRACT

Holiday festivities are a key aspect of contemporary consumer culture, but relatively few studies are devoted to understanding consumers' resistance of holiday traditions (and the corresponding creation of new holiday trends). In this article, we expand resistance theory via a six-year study of consumers' expectations, experiences, and alternative behaviors related to the Valentine's Day holiday. We introduce the notion of "market resistance," which refers to a behavioral opposition to status-quo behaviors and traditions associated with a particular market, such as a holiday market. Using multiple methods, we find links between consumer characteristics, the communication environment, and market resistance. Key characteristics associated with resistance relate to the consumer-- including unfulfilled expectations, exclusion, materialism and terminal gift syndrome, obligations, role exhaustion, and low need perception. Others are characteristic of the marketing communication environment and include message timing and overflow, commercialization of intimacy, corporate ownership, and tradition versus technology.

## INTRODUCTION

“Men are made to feel guilty and women are made to expect something. Pure heartburn. Pun intended.” [M, 38, Married].

It is typical to associate holiday heartburn with over-consumption of indulgent food and drink. During Valentine’s Day, heartburn sometimes takes on an emotional meaning as well. For many, Valentine’s Day serves as an annual progress report on the love life. It is a holiday associated with love; yet, every February 14<sup>th</sup>, loathing is also the air. Eye-rolling, empty wallets, sarcastic remarks about others’ display of gifts, curses at reminder ads, and empty hearts each represent the under-explored side of the Valentine’s Day holiday. Consumption is an active force in the construction of culture (Wallendorf and Arnould 1991), and consumption activities during this holiday may constantly evolve despite the marketplace traditions such as holiday shopping, dating, and the incurring gift/valentine card exchange.

Holiday consumption in general is worthy of scholarly research attention because of close tie-ins with contemporary society, culture, and personal relationships. The Valentine’s holiday market is an especially valuable context for studying contemporary consumption phenomena for four key reasons. First, this day entails distinct socially and culturally rooted traditions of intimacy and romance—to which the idea of resisting is especially interesting. Second, consumers enact distinct, often formal, repeated behaviors for this holiday (e.g., dating). Gift search, shopping, and exchange are other signature rituals, thus e-tailers, retailers, marketers, and consumers all court this holiday in a few

short days. Third, the corporate world plays an increasing role in shaping consumer culture associated with the distinct holiday rituals and traditions. Consumers may be especially sensitive to any sense of corporate invasion of personal or romantic relationships (those traditionally celebrated on Valentine's). Ultimately, consumers, marketers, retailers, and policy-makers face unique challenges (e.g., those associated with mass-marketed romance and sexual activity) that this holiday may heighten each year.

The U.S. Valentine's Day market is a fascinating social, cultural, and economically thriving context to study consumption phenomena and any incurring resistance associated with an internationally emerging consumption holiday. Economic significance is strong; U.S. consumers spent \$13 Billion on Valentine's Day retail purchases in 2005 (National Retail Federation 2005). This figure does not include service dollars (e.g., dining out, entertainment, beauty, travel). With the advent of DTC advertising, even the pharmaceutical industry plans communication strategies around the holiday. For instance, Viagra deems itself as "The Official Sponsor of Valentine's Day" (despite disapproval from the FTC).

In prior consumer research, holidays have served as an important lens to understand consumer behavior. For instance, we gain an understanding of feasting rituals and celebrations of enduring abundance through the context of Thanksgiving (Wallendorf and Arnould 1991). Christmas serves as a context to inform us on consumption as religion and the role of holiday icons such as Santa Claus (Belk 1987). More recently, studies during Halloween have demonstrated consumers' acceptance and even embracing of temporary hedonism and overt commercialism of a holiday (Harris 2006).

Netemeyer, Andrews, and Durvasula (1993) use the context of Valentine's Day to show how intentions relate to behaviors. Otnes, Ruth, and Milborne (1994) provide an understanding of young male's motivations in the Valentine's Day context. Here, we incorporate both male and female perspectives of this holiday, as well as both romantic and non-romantic relationships involving products, brands, websites, and the retailers to gain an understanding of resistance associated with holiday norms.

Additionally, we purport to further knowledge associated with the growing concern of consumer's resistance manifest in the marketplace. Our field has "yet to develop an integrated theoretical perspective of the phenomenon that considers the many and varied ways in which resistance of the marketplace and its offerings impacts consumer behavior." (Fournier 1998 p.89) With these concerns in mind, we maintain six specific objectives in the current study:

1. to introduce a definition of "market resistance" so as to enhance interdisciplinary scholarly research and practice,
2. to expand resistance theory (e.g., to the context of Valentine's Day),
3. to understand and explain the consumer characteristics that are associated with market resistance,
4. to understand and explain the and marketing communication environment and event characteristics that are associated with market resistance
5. to show what consumers are moving towards via their acts of resistance (what consumers are creating), and
6. to generate implications for retailing and interdisciplinary scholarship.

We use multiple methods to address the objectives, and we focus on describing a category of holiday consumption (e.g., non-traditional behaviors). We explore consumers' experiences and roles during this holiday. We deploy theory-based constructs from multiple disciplines to present and clarify the structure and processes of commercial holiday phenomena.

We organize this article as follows. First, we present a conceptual background in the areas of holiday promotion, resistance, and alternative consumption. We introduce the concept of market resistance. Next, we discuss the multiple methods, data analysis, and theme development. We then present the findings and an interpretation of the data drawing on concepts from resistance theory. We discuss implications of the findings, limitations, and avenues for future research.

## CONCEPTUAL BACKGROUND

We discuss three areas of a) promotion and holidays, b) resistance, and c) alternative and anti-consumption as they apply to the objectives.

### **Promotion and Holidays**

U.S. consumers have a relatively high resistance level to promotional messages (Wright 1975). Much of this research has focused on resistance to individual messages. Here, we broaden the concept to include resistance over time (e.g., to corporate activities and traditional rituals). Specifically, we present empirical evidence to show how

consumers resist entire markets, such as a holiday market. U.S. holidays often involve a cultural divide. Consider Christmas and Easter, where there is a divide between the secular side (that is sometimes associated with materialism) and the religious/spiritual side. Members of each side often question and may resist the efforts of the other side. For example, during Christmas, some advocates for minimizing materialism protect their friends with “anti-gift” certificates (see figure 5.1).

FIGURE 5.1: THE HOLIDAY ANTI-GIFT CERTIFICATE



\*Adbusters Magazine provides such "anti-gift certificates" for resistant consumers to exchange during Christmas.

In contrast, secular and religious forces do not especially polarize Valentine's Day culture, as this day does not have strong religious connotations<sup>12</sup>. Although the day shares the name of a saint, most holiday celebrations in the U.S. are not religious in nature. As a result, Valentine's is one of the few holidays that children collectively participate in during (e.g., public) elementary school.

Valentine's Day is purportedly a holiday where for all can share, and in this way, it is similar to other non-religious focused holidays such as Thanksgiving, Halloween, or the 4<sup>th</sup> of July. The holiday appears to get bigger and longer each year partly because of cultural exchange, the Internet, retailing practice and partly because of expanding consumer expectation. At the same time, some consumers may dislike the expansion of this holiday.

### **Resistance Theories in the Extant Literature**

As part of an effort to expand resistance theory, we present a definition of resistance in general, before introducing our introductory definition of "market resistance." In general, resistance entails an opposing or retarding force (Fournier 1998). Defined, resistance is the "counter-hegemonic social attitudes, behaviors, and actions that aim at weakening classifications among social categories and that are directed against the dominant power and against those who exercise it, with the purpose of redistributing equality" (Fernandes 1988 p.174). Based on this definition, we address the first objective:

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<sup>12</sup> Rothman (1984) provides a historical perspective, including some religious associations, of Valentine's Day.



introduce a definition of “market resistance.” We specifically define *market resistance* as *an opposition to status-quo traditions in the marketplace, with the purpose of re-creating new behaviors*. Market resistance is not a “non-behavior”; it entails behavior that avoids the status-quo or norms manifest in the marketplace.

In the social science literature, resistance is defined as avoidance of unpleasant or dangerous feelings (Perls et al. 1951), desire to counteract someone else’s attempt to limit one’s choices (Brehm 1996), or a feeling of ambivalence about change (Arkowitz 2002). Our proposed definition has some key advantages for application to the consumer behavior literature. First, past definitions from psychology apply to the study of resistance to just one particular message or to a “persuasive attack” (e.g., Tormala and Petty 2002) within a short period. Our focus is on resistance along with a *lifetime* of messages, promotions, marketplace activities, and consumers’ built-up associations. Second, our focus is on behaviors—specifically alternative-consumption behaviors. Past definitions focus on studying just the affective or cognitive component of resistance. Although we include the affective, cognitive, and behavioral components, our definition focuses on behavior.

Prior conceptualizations imply that resistance is not desirable. Here, we do not imply that resistance is good or bad, as this depends on one’s current state. If one values the current state, resistance to change is “good,” and if the current state is undesirable, then resistance is “bad” (Nord and Jermier 1994). In addition, if consumers’ resistance hinders the objectives of others, then resistance could be detrimental. Resistance entails non-compliance with a *directive* (Newman 2002). For consumers to resist, they often

propel in a different direction. For example, some consumers could resist Valentine's Day traditions to value acts of love and relationship building on a daily basis.

There are many terms associated with resistance. We define and introduce the following terms: partial resistance, global resistance, virtual resistance, effective resistance, manifest resistance, individual resistance, and collective resistance. We share the definitions of these terms in table 5.1.

TABLE 5.1: TERMS AND DEFINITIONS ASSOCIATED WITH RESISTANCE

<b>Term</b>	<b>Definitions*</b>
<b>Resistance</b>	Counter-hegemonic social attitudes, behaviors, and actions that aim at weakening classifications among social categories and that are directed against the dominant power and against those who exercise it, with the purpose of redistributing equality.
<b>Partial Resistance</b>	Resistance to the social and cultural reproduction that takes place at either the level of: a) reproduction of the sexual and social division of labor, OR b) inculcation of the dominant ideology.
<b>Global Resistance</b>	Resistance to the social and cultural reproduction that takes place simultaneously at: a) reproduction of the sexual and social division of labor and b) inculcation of the dominant ideology
<b>Virtual Resistance</b>	Aims at counter-hegemonic objectives Also known as Potential Resistance
<b>Effective Resistance</b>	Provokes counter-hegemonic effects
<b>Manifest Resistance</b>	Expressed attitudes, behaviors, and actions that aim at counter-hegemonic objectives
<b>Individual Resistance</b>	Resistance from one person
<b>Collective Resistance</b>	Resistance from one or more groups of persons

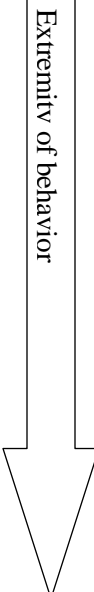
\*These definitions are derived from Fernandes 1988.

One may observe resistance through actions of alternative consumption or non-consumption, which we will now introduce.

## **Alternative Consumption and Voluntary Simplicity**

Alternative consumption is conceptualized here as a broad category of non-traditional consumption. We focus on understanding behaviors that are counter to behaviors that are traditionally associated with the marketplace during the Valentine's Day holiday. We also focus on understanding any consumer movement to create something via the resistance, such as trends of voluntary simplicity. Voluntary simplicity "involves both inner and outer conditions, means singleness of purpose, sincerity, and honesty within, as well as avoidance of exterior clutter, of many possessions irrelevant to the chief purpose of life. It means an ordering and guiding of our energy and our desires, a partial restraint in some directions in order to secure greater abundance of life in other directions. It involves a deliberate organization of life for a purpose." (Gregg 1936 p. 2) Although voluntary simplicity is just one part of the alternative and anti-consumption literature, it is most relevant to the objectives of hand and thus we will be exploring it in more detail in this paper. We do recognize that other parts of the literature focus on consumer grudges, consumer rebellion, consumer boycotting, and consumer retaliation (table 5.2).

TABLE 5.2: EXTREMITIES OF ALTERNATIVE-CONSUMPTION BEHAVIORS



Domain	Examples of Research
<b>Voluntary Simplicity*</b>	Gregg 1936; Leanord-Barton 1981; Schmidt 1995; Belk 1987, Belk 2001; Craig-Lees & Hill 2002; Shaw & Newholm 2002; Zavestoski, 2002b
<b>Consumer Grudges</b>	Francis & Davis 1990; Huefner & Hunt 2000; Hunt & Hunt 1990; Aron 2001
<b>Consumer Rebellion</b>	Dobscha 1998; Fournier 1998; Austin & Zinkhan 2003
<b>Consumer Retaliation &amp; Boycotting</b>	Friedman 1985; Garrett 1987; Herrmann 1993; Kozinets & Handelman 1998; Singh 1988; Huefner and Hunt 2000; Sen, Gurhan-Canli, & Morwitz 2001; Huefner, Parry, Payne, Otto, S.D., Huff, S.C., Swenson et al. 2002; Klein, Smith, & John 2004

\*Voluntary simplicity is a focus here, as it turns out as the most prevalent of the alternative-consumption domains during Valentine's Day.

## METHODS

We use a multi-method approach to understand Valentine's Day phenomena. We include five methods over seven years (2000-2006). A long-term study is necessary because this holiday, like many, comes just once a year. The five phases include: 1) analysis of diaries from consumers with various relationship statuses, 2) analysis of online diaries and postings, 3) group interviews with females in a romantic relationship, 4) interviews with retail executives and managers, and 5) observations and interactions in the retail environment. We incorporate various kinds of human relationships (e.g., familial,

homosexual, friendly), although most discussed heterosexual romantic relationships<sup>13</sup>.

Table 5.3 summarizes the methods, sample sizes, informants, period, and focus for each phase.

TABLE 5.3: MULTIPLE METHODS

<b>Method (Sample size)</b>	<b>Informants/Participants</b>	<b>Time Frame</b>	<b>Focus</b>
Diaries* [D] (n=149)	-Males & Females -Ages 18-47 -Various Relationship Status	2002- 2005	Cultural rituals, gender roles, enjoyment factor, retail associations & comparison to other holidays
E-Diaries** [E] (n=47)	-Posters to e-diaries & boards during Valentine's Day -Males & Females -Unknown Ages -Various Relationship Status	2000- 2005	Naturalistic consumer thought of holiday meaning & materialism
Group Interviews [G] (n=6)	-College students -Females -Age 18-22 -In a dating relationship	2003	Rituals, traditions, purchases, meanings behind purchases & us- gifts
Retailer Interviews [R] (n=19)	-Corporate Marketing & Retail Executives -Managers of Retail Establishments -Individual & Chain Stores -National Sample	2004	In-store aspects, retail strategy for Valentine's
Observations [O] (n=41)	-In store/virtual store -Retail Employees & Shoppers -Valentine's Gift Shoppers	2003- 2006	Interaction with managers, employees, & shoppers on the week of & on Valentine's Days, observatory field notes of synergies

\* denoted by [D]

\*\* web posting date documented, sources include: diaryland.com, opendiary.com, my-diary.org, diarist.net, mydeardiary.com

*Diaries [D].* One-hundred forty-nine consumers kept diaries related to their thoughts and behaviors concerning the holiday. The age of diary authors ranged from 18-67. A

<sup>13</sup> For a focus on gift giving in homosexual relationships, please refer to Newman and Nelson (1996).

relatively even distribution of males and females in various relationship statuses (e.g., single, dating, married, divorced, widowed), professions, and geographic backgrounds wrote entries. They wrote about their experiences with the holidays: cultural rituals, gender roles, marketing associations, enjoyment factor, and comparison to other holidays. Consumer diaries give a personal feel, and some informants feel more comfortable writing their story rather than discussing it in person. Attention to this is important due to the more intimate nature of this holiday.

*E-diaries and postings [E].* To complement the offline diaries, we collected online diary entries and postings on and about this holiday. Online informants often share their screen-name, sex, and location. The anonymity and facelessness provides for rich, less-censored sentiments and experiences on the holiday. Importantly, those who discuss this holiday in their online diaries or message boards likely do so from their inner desire.

*Group interviews [G].* To incorporate group dynamics, we conducted group interviews with females in a romantic relationship. We focus on females here, as females are the “heroines of the holiday.” A co-ed presence could inhibit discussion. Female college students (half in a new relationship and half in a more established relationship) discussed Valentine’s with the moderator for ninety minutes as a female author took field notes.

*Retailer interviews [R].* We conducted depth interviews with retail and e-tail managers in industries that emphasize this holiday in their strategy. The sample includes greeting card, floral, jewelry, chocolate, confectionary, cosmetics/beauty, and the fragrance

industries. The sample also represents independent boutiques, e-tailers, mass discounters, grocers, and department stores. Retailers range from small, independent shops to large multi-national companies and many have an e-tail counterpart. Some interviews took place in the retail establishment) and others via telephone to attain a broader geographic scope. Most interviews took forty-five to ninety minutes, and were recorded and transcribed.

*Observations [O].* In order to examine consumer and retailer issues in tandem, we spent time in stores that are popular during this holiday. We conducted fieldwork in a floral department of a national grocery chain in stage one. We sat with employees and interacted with shoppers during the week of and on Valentine's Day 2003. We conducted a second round with a different retailer in 2004, third round on the weekend before Valentine's Day 2005, and a final round beginning in January 2006. Round one took place in mid-size southeastern city, round two in a large southeastern city, round three in a large southwestern city, and round four in a suburb of a large southeastern city.

*Data analysis and theme development.* We iteratively analyzed the data based on the objectives, theories, and themes identified in the literature. Via axial, open, and selective coding, we grouped similar findings and observations into categories of meaning. This contributed towards revealing emergent patterns (Wolcott 1990). In the process, many new themes became apparent. The authors reviewed each other's data interpretations until saturation. Although we found many consumer themes, we focus on findings of consumer resistance.

*Validity and reliability.* We used suggested approaches (Spiggle 1994) to increase validity and reliability. We used multiple methods to depict an overall, holistic understanding of the objectives as suggested by Creswell (1998). We triangulated the data in many ways to gain a full phenomenological understanding (Moustakas 1994). For instance, we spent time in bricks-and-mortar stores as e-tail stores. An author collected data in electronic environments (e.g., e-diary sites, message boards, chat rooms) in addition to the traditional e-tail environment. We considered multiple theoretical perspectives along with the findings. We bracketed introspective notes during each phase. We followed up with informants and presented the completed study to retail executives for feedback.

## FINDINGS: UNDERSTANDING CONSUMERS' RESISTANCE

We present evidence that, within the realm of Valentine's Day, a segment of consumers challenge the norms of the holiday market. These consumers creatively resist aspects of the holiday and recreate new rituals. For example, consumers rename the holiday as "Singles Awareness Day," "The Hallmark Holiday", "Maximized Profit Day", and simply "VD". Another example is spreading negative experiences via word-of mouth (both online and offline). Other, more extreme examples (which are not so widespread) include boycotting marketers or creating defaming/satiric websites. Recall, table 5.1 (e.g., partial, global, virtual resistance). In the next section, we re-examine the terms from table 1 along with specific examples.



*Terms of resistance.* We now introduce some specific terms and examples of resistance that appear in the data (table 5.4).

TABLE 5.4: TERMS AND FOUND EXAMPLES OF RESISTANCE

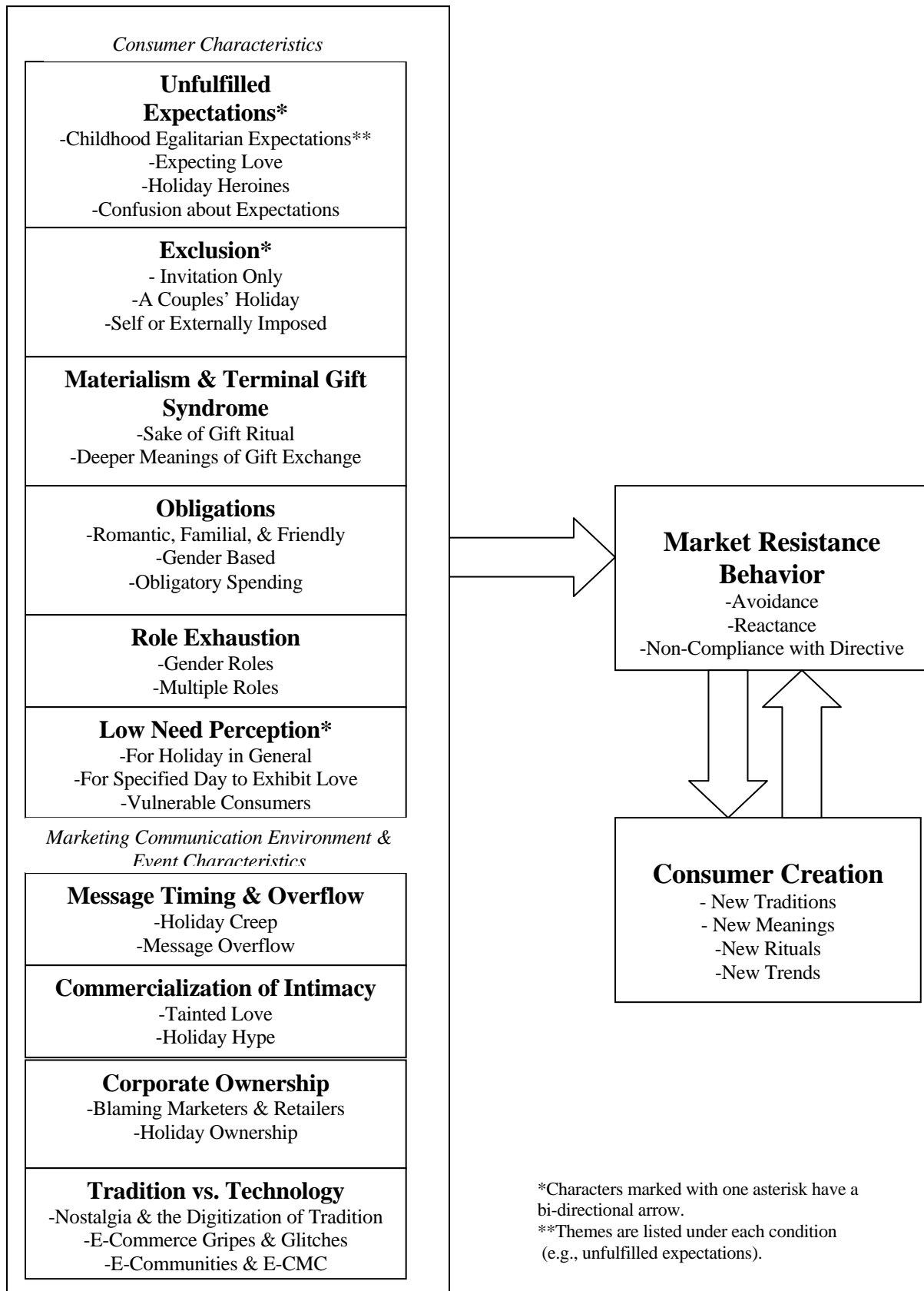
<b>Term</b>	<b>Example From the Data</b>
<b>Resistance</b>	A consumer expresses dislike of the Valentine's Day commercialism and explicitly operates outside of the holiday market by exchanging hand-made gifts in lieu of purchased gifts, while encouraging others to follow suit.
<b>Partial Resistance</b>	A female sends flowers to a male and contributes towards changing gender roles for this holiday.
<b>Global Resistance</b>	A female sends flowers to a male and contributes towards changing gender roles for this holiday, AND inspires other females to pamper males (i.e., lessens the gender stigma)
<b>Virtual Resistance</b>	A teacher teaches that the importance of Valentine's Day is togetherness, not just exchanging cards and gifts.
<b>Effective Resistance</b>	A teacher bans Valentine exchange in his or her classroom.
<b>Manifest Resistance</b>	A consumer suggests a ban on Valentines' activities and purchases in a chat room.
<b>Individual Resistance</b>	A single woman writes about her contempt for the holiday and does not purchase for the holiday.
<b>Collective Resistance</b>	A group of singles gathers in an anti-Valentine's chatroom to discuss holiday coping strategies.

### **Event Characteristics, Marketing Communication, and Consumer Characteristics**

While figure 5.2 presents a broader framework of resistance, recall, the main objective is to focus on the potential drivers of market resistance that are related to the consumer characteristics, the event (e.g., holiday) characteristics, and the marketing communication environment. Thus, in this section, we focus specifically on the drivers of market resistance. These drivers are listed in figure 5.3. As shown in the figure, six are consumer characteristics (i.e., unfulfilled expectations, exclusion, materialism and

terminal gift syndrome, obligations, role exhaustion, and low need perception). Four drivers relate to the marketing communication environment and “event” characteristics (message timing and overflow, commercialization of intimacy, corporate ownership, and tradition versus technology). Note that three of the conditions (i.e., unfulfilled expectations, exclusion, and low need perception) stimulate market resistance and in turn are influenced by market resistance.

FIGURE 5.2: CONSUMER CHARACTERISTICS, EVENT CHARACTERISTICS, THE MARKETING COMMUNICATION ENVIRONMENT, AND MARKET RESISTANCE



Although our focus is on market resistance behavior, we point out that some of these variables also have related effects (i.e., in addition to market resistance). For example, other outcomes that we find include monadic gift giving, consumer setting of a price ceiling, and procrastinating shopping or purchasing. Here, we focus on the central outcome of market resistance and the associated consumer creations. We now focus on the conditions based on consumer characteristics.

## CONSUMER CHARACTERISTICS AND MARKET RESISTANCE

We find some key consumer and relationship characteristics, such as unfulfilled expectations, exclusion, materialism and terminal gift syndrome, obligations, role exhaustion, and low need perception for the holiday that are associated with relate market resistance. We consider each condition with respect to one another, as some (e.g., obligations and role exhaustion) often go hand-in-hand. For another example, unfulfilled expectations from past Valentine's Day may include memories of feeling excluded on this day.

### **Unfulfilled Expectations**

Valentine's Day is full of expectations. Shattered expectations of past Valentine's Days, beginning with childhood, contribute to (and sometimes stem from) resistance. Key expectations include dating, intimacy, sex, love, and enacting of gender roles. Consumers often do not know or are unclear about what they expect, or what others expect from

them during this unique holiday. Confusion may stem from an early age, as the rituals develop along with the person.

*Childhood egalitarian expectations.* Consumers' expectations appear to build-up from childhood. In grade school, the rituals of card, candy, and exchange of affection are often egalitarian. At this age, everyone expects involvement and recognition.

"Valentine's Day is generally an enjoyable holiday for kids, since they can eat a lot of candy and have parties at school. As long as the teachers require the students to bring everyone else in the class a valentine (generally not made out to a specific person), they will not suffer too much from feeling left out if they are not popular. However, public Valentine's Day rituals can make those who do not have a spouse, boyfriend/girlfriend, or other type of significant other, feel noticeably left out and even lonely or depressed." [F, 40, Married]

Kind or mean, funny or bland, pretty or ugly— valentine exchange is for every child at school. Such early behaviors seem to prime expectations for a lifetime of being recognized, and receiving at least a card.

*Dates, sex, & intimacy.* Consumers often write about their expectations surrounding dates, sex, and intimacy in to their overall expectation of the holiday. Some younger daters write that they expect the evening will end up with sex. Although some novice daters appear to have little clue about what their date expects [O], most experienced males know what is expected of them.

The man is expected to take the woman out to dinner that night at a special place. This is actually the most difficult part since every other man in town has the same goal. Not just any restaurant will do. It has to be intimate, secluded, candle-lit, and EXPENSIVE. Pity the poor man who forgot to make reservations and winds up at Waffle House desperately trying to salvage the night. [M, 46, Married]

Furthermore, males expect to "be expected to" spend first.

I took my wife to Faugu Gaucho (a Brazilian Steakhouse) and then a romantic drive down the highway home for a night of mad passionate lovemaking. Males buy more expensive gifts, women get away with a card.  
[M, 22, Married (Newlywed)]

Sex and food are two things males mention with their expectations for the day. This food is not always the characteristic food of Valentine's Day (e.g., chocolate) or even the more expensive steak or seafood dinners. Sometimes it is simple as sex and pizza (in that order):

I had my fiancé over for sex and pizza. We exchanged gifts and then had strawberry pie for dessert. We watched TV for a little while, then fooled around again. [M, 23, Engaged]

Many prefer casual encounters such as the one above to commercially packaged packages, while others expect any form of recognition. Reactions to unfulfilled expectations sometimes affect others who otherwise may have a delightful day, such as in the case of this resistant woman:

I did not have a Valentine today. My roommate did though. When she was out having dinner with her lover, I ate all her candies and cut up all her flowers. When she got home and saw what I did she was so angry with me! I told her to not be so uptight...the situation was actually hilariously funny. If someone bought me a box of candy or flowers, this never would have happened....even the cheap-o brand chocolates that say "I choo-choo-choose you!" would have been great. Now I'm fat and alone. Maybe I'll fall down the stairs. Great. [F, 2-14-2003; 9:11PM]

This woman expects something, even a "cheap-o" box of chocolates from someone. Chocolate has associations as an aphrodisiac and represents an array of meanings including guilt and sensuality (Barthel 1986; Belk and Costa 1996). The higher expectation, however, is not for fancy foods and things; it is for recognition, intimacy, and love.

*Expecting love.* Some expect love during this season, and are disappointed at the least if they do not experience or share love. Consumers equate love with the purpose of this holiday. Moreover, they expect to see signs of it everywhere. Yet, some do not expect to escape:

“The purpose of Valentine’s Day is to tell your loved ones that you love them. Everywhere you go everything is red and all about Valentine’s Day. You can’t get away from it. But I had to work, so I then heated up leftovers and studied.”  
[F, 22, Dating]

Other ways to demonstrate love include remembering past loved ones. One woman does not celebrate out of remembrance of her best friend.

Valentine’s Day is a holiday for people to show their love for one another...but I lost my best friend on V-Day five years ago. I no longer celebrate the holiday. It is a day of remembrance for me. [F, 21, Single]

Love between friends—especially females—is a large part of this holiday. Although “Cupid should hit me anytime now” is a recurring sentiment, consumers do not limit their expectations to romantic love. “Romantic love” is about affiliation and dependency, physical attraction, exclusiveness, and idealization (Critelli et al. 1986). “Conjugal love” is a love between two adults and is associated with a strong trust, friendship, acceptance, respect, sharing, intimate knowledge, and a sacrifice (Critelli et al. 1986). “Genuine love” (Fromm 1956) is a distinct expression of optimal functioning surrounded by a desire to have intimacy without roles or masks. This is often confused with “pseudo love” (Fromm 1956), which is characterized by passiveness and neurotic dependency.

Philosophical contexts of romantic exchange, such as during Valentine’s Day, link to the love’s psychological significance. Various theorists (e.g., Freud, Reik, Fromm) address love. Freud claims that falling in love is a substitute for personal achievement.

One projects characteristics that constitute the ego ideal to loved ones. For instance, one may not excel in his or her career, but he or she still may succeed in the love department. Flowers and other visible exchanges on Valentine's Day announce this success.

A competing idea is that falling in love is an attempt to obtain qualities that one lacks (Reik 1944). Valentine's Day is a socially acceptable time to seek and pursue a lover. In some ways, this pursuit is to complete the self. Although scholars do not agree on this, most do recognize that love is a dynamic concept—often with recognizable stages.

Stages of love deal with the role of the partner. Two stages are: 1) the desire to fall in love from an internal discontent, and 2) true love in a committed, selfless, and enduring fashion (Reik 1944). We note similarity of stage one with Fromm's (1956) "immature love." An exploitation of the other to satisfy individual needs characterizes immature love. We further note similarity between Reik's stage two with Fromm's (1956) "mature love." In mature love, the concern for the partner's overall welfare drives the love. Love benefits both males and females; yet, Valentine's Day is a "female holiday."

*Holiday Heroines.* Valentine's Day caters more towards the female—the "heroine of the holiday." Many females share expectations for an extraordinary day. One woman describes her lavish evening:

I went to dinner with my husband. We also went to a movie. We took in some dancing at the restaurant. I received roses on Valentine's Day...Most people are set in their ways of giving the same things every year. I think makes perform more (roles) on Valentine's only because of female expectations. [F, 44, Married]



She contributes her night out to making her expectations clear to her husband.

Without “instructions” (from others or advertisers), some males are confused about what is expected from them each year.

*Confusion about expectations.* Confusion surrounds whom to recognize for this holiday. Some wonder if there is an expectation to give to family members, friends, or colleagues. One woman sees her bosses’ disappointment each year, so she took the role of her husband:

I gave a rose to my manager. Her husband of ten years had never given her anything (for Valentine’s Day)! [F, 24, Single]

Sometimes expectations are high from year’s past. As a result, the behaviors become more extravagant every year.

Going and picking wild flowers, or walking under the stars, or fixing breakfast in bed for that special someone is not enough for Valentine’s Day. Last year I took her to New York. This year I gave her a rose for every month we have been together—one at a time. Then I took her to the movies and dinner. The retailers cater to females’ feelings that they are not loved unless they receive red roses or heart-shaped candy. [M, 29, Married]

However, fanciness peaks, and the couple adapts to a low-key version of the holiday with acts of voluntary simplicity. Such consumers still recognize the holiday, yet they do not buy the traditional goods associated with the mainstream Valentine’s market. They exclude themselves from such culturally constructed normative behavior.

*Voluntary simplicity.* Voluntary simplicity manifests as a set of behaviors indicative of a self-sufficient low-consumption and “economically neutral” lifestyle (Leanord-Barton 1981). It includes self-determination, material simplicity, human scale, personal growth,

and ecological awareness (Elgin and Mitchell 1995). With this trend, consumers resist the dominant markets (e.g., a fancy restaurant, platinum jewelry, greeting card) for a simpler, often more intimate solution (e.g., a backyard picnic, hand-made jewelry, personalized e-card) for reasons beyond financial constraints (Close and Zinkhan 2005). Trends of market resistance may shift the sphere of exchange and consumption—from the traditional marketplace to the virtual marketplace and the home. Voluntary simplicity is particularly important to explore during holidays.

Holidays have become lavish consumption-filled celebrations. Common activities at this time include spending time with loved ones, exchanging gifts, and consuming distinct food and drink. Some researchers note the strong presence of materialism during Christmas (Schmidt 1995; 1987). Although voluntary simplicity entails less extreme behaviors, consumer grudges, rebellion and boycotting are more extreme cases of alternative or resistant behavior that have been cited in the marketplace (see table 5.2).

## **Exclusion**

We find that exclusion is a condition that drives market resistance and, at times, is an outcome of market resistance. Although some exclude themselves from mainstream behavior, others report experiences of external exclusionary forces. Exclusion is traditionally associated with a loss of power (Skvoretz and Willer 1993); however, this association assumes that the person does not choose exclusion. We find that some of the perceived exclusion during Valentine's Day is self-imposed. Exclusion may be a gratifying, positive thing (i.e., if it is self-imposed/imposed by a couple) or a confidence-

reducing, negative force (i.e., if it is imposed by external forces, such as the socio-cultural landscape). It is interesting to note that some external exclusion is not necessarily a bad thing. Some act relieved after hearing denial of dinner reservations on this night. Others act superior to other people and couples who are “drawn into the holiday of the “masses.”

*Invitation only.* In the spirit of secular American holidays, holidays are a time for all to recognize and celebrate. Nonetheless, some feel left out. If Valentine's Day is a party, some simply feel uninvited. Relationship status often serves as a basis of this “invitation.” A single woman shares her harsh reminder of this:

Well it's been almost 2 months since Christmas, and us single folks are finally recovering from the psychological damage making it through the holiday season does to us. So as I am almost fully recuperated myself, I would like to extend a warm thanks to Hallmark, the official sponsor of Valentine's Day, for reminding me that without a significant other, how truly worthless my life is.... In my defense, who wants to celebrate a holiday whose initials are VD anyway? [F, E, 2-14-04]

She seems to seek comfort by using humor as a defense mechanism as a way to reclaim power. Although “not invited” to Valentine's Day, she feels that the holiday is a “couple's party.”

*The “couples' holiday.”* To singles, Valentine's Day is perceived as a “couples' holiday.” Specifically, this is a holiday for those in a traditional, heterosexual romantic (dating or married) relationship. Singles, separated individuals, and those in non-traditional relationships feel excluded from this holiday. One “excluded” male suggests:

Make it Singles' Awareness Day. [M]

Another consumer feels excluded on this day because she is in a long-distance

relationship:

I miss my boyfriend because I could not see him on Valentine's Day and I was constantly reminded of that. [F, 22, Not Single]

*Ideas for inclusion.* Some who feel excluded do not feel that this exclusion is set in stone. Just as their relationship criteria are dynamic, so is their exclusion (or inclusion) from year-to-year. The following are some ways for marketers could include them:

Target singles or those who do not like Valentine's Day in ways to promote self-esteem or recognition of individualism. [F]

Create anti-Valentine's day cards or special rewards— coupons, discounts for singles. [M]

Adding humor is a main way to enlighten some of the spirits of the excluded. It is interesting to consider if an attempt to include “excluded” individuals would appease them, or if such would facilitate more gift exchange for the mere sake of it.

### **Materialism and Terminal Gift Syndrome**

Valentine's, like many holidays, has distinct gift exchange traditions (e.g., red roses, jewelry). Exchanging things may bring enjoyment and further human development or relationships (Csikszentmihalyi and Rochberg-Halton 1981). Under instrumental materialism, possession of things serves goals that are independent of greed, and these goals are often associated with forming bonds or links with other human beings (Csikszentmihalyi and Rochberg-Halton 1981). Things can serve as a common good for a consumer or culture (Csikszentmihalyi and Rochberg-Halton 1981). Thus, the gifts shared

for Valentine's should be vehicles to bring consumers together (e.g., in an intimate relationship). The exchange should represent meaningful human emotions.

You always hear stories from men who missed the mark on the gift and give the woman an exercise tape while she gives him sand gathered from the beach where they first said 'I love you.' [M, 44, Married]

We find that some exchange Valentine's gifts, from an exercise tape to a platinum bracelet, because it is "the thing to do," "just for the sake of it," or because the holiday is about "going to dinner and exchanging gifts." For some, gift exchange is a means without an ends. Some have lost sight as to what such gifts, in theory, represent. Instead, the "things" exchanged have become the focus for what is meant as an intimate holiday. Various comments highlight the misdirected materialism.

Valentine's Day is far too materialistically-driven. [F]

Guys are pursued to make romance happen through tangible items. [M, 23, Not Single]

Materialism theories provide some guidance for understanding resistance to the traditional Valentine's Day market. Materialism is the importance a person attaches to material possessions and the belief that certain possessions are a main source of happiness (Belk 2001). Some scholars relate materialism with crass self-centeredness or a shallow quest to acquire possessions as symbols of status, wealth, or power (Csikszentmihalyi and Rochberg-Halton 1981). Specifically, terminal materialism is consumption for the mere sake of consumption. Some elements of terminal materialism are apparent during Valentine's Day. We develop the concept of "*terminal gift exchange*" to explain such phenomena. Gift givers initiate a terminal gift exchange for the mere sake of gift exchange. We do not associate this type of exchange with deeper meanings.

I don't like the cheap chocolate, teddy bears, etc. And my boyfriend doesn't like the flowers...especially for specific occasions such as Valentines. Even though it doesn't make me want to buy any of the traditional Valentines products... it does get me excited before hand when I see decorations. [F, 22]

A common feeling is that the time together and shared experiences are much more valuable and desired for Valentine's Day. Unfortunately, money and "stuff" become a source of fixation, as one woman notes:

I think the focus needs to be spending time together-not money on each other! [F]

A mindless ritual of gift exchange "just because it's the time to give chocolate" is different from feelings of obligation.

## Obligations

Many consumers, especially those in a romantic relationship, feel obligated on this day. Most obligations are financial—with the majority of the burden going to the male.

Males, especially feel that they are the ones with the obligations.

Males *must* buy flowers and candy, take loved one out to eat at favorite restaurant etc, females don't have to do much other than get ready to go. [M, Dating]

Males *have to* take the girls out to eat and give them presents. [M, 22, Not Single]

Women want the gifts; men are *obligated* to get them. [F, 29, Single]

Obligations are not necessarily a bad thing, especially when the recipient is appreciative and having a good time:

Males must do something special for the female such as taking them out and buying them something nice. The female is just supposed to smile and be appreciative of what the male is doing. [M, 21, Single]

For females it is a day to receive gifts and to be pampered. For males, it is a day to buy gifts and to do everything possible to make sure the female has a good time.  
[M, 24]

One married man describes the upside of his obligation as a chance to share emotions to his wife.

It is a way of showing my wife how I feel about her. [M, 48, Married]

Other times the obligation is towards meeting the partner's expectations:

Males are expected to give their partner gifts and presents because they don't want to get in trouble— instead of because they want to or because they love the person. Women love the idea of romance so they usually have high expectations and give good gifts to their partner in return. [F, 23, Not Single]

*Obligatory spending.* Men and women report strong obligatory feelings to give gifts for Valentine's Day (Otnes et al. 1994; Close and Zinkhan 2006). Generally, males are in the spending position (e.g., for dinner, wine, gifts). Some see Valentine's Day as a day that they are obliged to spend money:

Females, I see this day marketed as a romantic and expect the big question day.  
Males, I see this day marketed as spend a whole lot of money or else day.  
[F, 31, Dating]

It is a cheesy, overblown, stupid holiday to force you to spend your money on each other. [F]

Females have a more positive attitude than males have about Valentine's Day gift exchange (Otnes et al. 1994). This is in part because women do not feel as obligated to purchase a gift for their partner, and women do not feel as much pressure as males (Otnes et al. 1994). Many females in relationships expect to receive a gift or card that they otherwise would not receive. Women, however, report higher obligations to buy for

friends and family members than men do (Close and Zinkhan 2006). Sometimes it is not clear where the expectations and obligations lie.

Obligation is a breeding ground for resistance. Obligation entails that one gives a gift because he or she “just has to.”

No! It's a big fake day. It makes you do things even if you don't want to. [M, Dating]

It just seems like if you're dating someone you just have to do something. It's really just like any other day just with a card and a title. Just a day to make people show love that usually don't but you should show love everyday. [F, 20, Dating]

Males are robots, always doing the same thing. Females I know hate Valentines Day because of their male partner. Valentine's is geared toward females because that's what advertisers want us to see. [F, 21, Single]

Some feel the “fake day” itself makes them do and buy things in a zombie-like manner.

Consumer “obligation” appears to be associated with negative attitudes towards marketers, advertisers, and retailers. The consumer may feel subordinate (i.e., has less power than the marketer or retailer) as he or she is in a perceived state of purchase “necessity” stemming from obligatory feelings. This state seems quick and intense, partially due to the last-minute purchases common to the season. This is a power loss for the consumer, who traditionally enjoys courtship from marketers and retailers. Negative attitudes may form towards the holiday, associated marketers and retailers, and other consumers. Some of these obligatory feelings are due to perceived roles.

## **Role Exhaustion**

Valentine's is a holiday that is governed by gender roles, and within each gender role, there are multiple components to fully exhausting these roles. Where Superbowl



Sunday is a “man’s day,” Valentine’s Day is the female day. It is too feminine for some males, who feel uncomfortable stepping out of their masculine ways:

It's not very masculine. There are ways of marketing "love" without making us feel like pansies. Most companies can't figure it out though. [M, 23, Dating]

Females are the heroines of this holiday, where males enact roles that often recognize the female on this day.

*Gender roles and the heroines of the holiday.* One female notes the gender roles in terms of who does the “wooing” or the romancing:

The male is the wooer. The female is to be wooed. [F, Dating]

“The male role is to sweep the female off of her feet. The female role is to be swept away, but also to let the man know how important he is to her. Males should be the ones to show how sweet they can be because of romance’s history. [M, Dating]

The male demonstrates to the female that she is meaningful to him in many ways.

In my opinion, it is a day for the male to show his partner how much she means to him. I don't really care if I get anything on Valentine's Day. [M, 23, Dating]

Males play the role of somebody that cares about their significant other on this day. It's an excuse for men, some who would never do this on their own volition to show some of that soft ‘puppy belly.’ By this, I mean that men who are normally not emotional are expected to be vulnerable and extremely cognizant of their significant other’s feelings on Valentine’s Day. I feel that a lot of pressure is put on men to plan an acceptable Valentine’s Day. [F, 41, Married]

Traditionally, the male has been the gift giver, yet current trends show a move towards the females gaining a giving role.

Traditionally the males are supposed to buy something for the females, but things seem to be moving in more of a mutual gift giving direction. [F, 21, Not Single]

Nonetheless, most still regard females as the “heroines of the holiday.” As one woman discusses in a focus group:

Marketing prepares us to be pampered. [F, 23, Dating]

However, many females enact more than the role of the heroine for this day.

*Multiple roles.* Some consumers serve multiple roles, which exhaust them during this holiday. For example, some women recognize their significant other, mother, friends, sisters, colleagues, and neighbors for Valentine’s Day. Some men recognize these multiple roles with respect:

It’s time to show not only love for my spouse but respect and admiration for her role as wife, homemaker and mother. [M, Married]

Other women strive to fulfill the sexy role and the practical role, which is difficult to balance:

In general, it is a holiday for women. How many women buy something other than a sexy outfit for their husbands? Sure, I bought my boyfriend something but it was practical— a back scrubber and guitar tuner. [F, 21, Not Single]

Women who are interested in taking the relationship to the next level in the future (e.g., from girlfriend to wife) seem especially concerned with fulfilling sensual and practical roles. They may want to show that they are fun and sexy; yet, someone who would also make a good partner and mother in the future. For some, this holiday is a good chance to demonstrate the ability to enact multiple, sometimes conflicting roles. For others, there is little to no perceived “need” for this holiday in its current form.

## Low Need Perception

Sometimes individuals resist things or events that do not apply to their lifestyle or that they do not see as a need for the community-at-large. Time constraints and the perception of being a vulnerable consumer during the holiday contribute to a consumer's or couple's low need perception for this holiday as it is currently traditionally celebrated. Sometimes this low need perception stems from past years of resisting the traditional Valentine's market. A recurring sentiment is that this is an unnecessary holiday, because people need to recognize love throughout the entire year.

*Love. Now.* Others hate the commands of when to show their love, not the concept of the holiday itself. People feel that they should not reserve love for this day. It is rare that someone makes a connection with why February 14<sup>th</sup> is specifically "the day."

"I have consciously not participated in Valentine's Day rituals since elementary school.

Although, I may have partaken in some without meaning to. I don't necessarily disapprove of the holiday, but I don't see why I should suddenly feel more or less romantically inclined on a certain day just because the general public, with eager support from retailers, has decided that this day should be celebrated in a certain way. As far as I know, males might take a special girl on a date. He may give her flowers or chocolate, or show her attention in some other way. His behavior would usually be romantic in nature. But again, I don't consciously participate in any significant way. [M, 33, Single]

It's a day that forces feelings we should exhibit everyday. In theory, its fine, but we should act like this on a random Tuesday in November instead of just one day. Plus I hate the whole marketing of gifts and guilt thrown on this one day. [M, S, Dating]

I think if you love someone, you don't need a special day to show it. Every day is suitable for this. [M, E, 2-15-00]

I hate this day, because there are so many people who interpret it in a wrong way. If we love someone, we'll always love forever and ever. No matter what day it is. [M, E, 2-0600]

If you truly love someone every day is Valentine's Day. I see it as pushy and overrated. But the women seem to like it, so I play along. [M, 23, Dating]

Such individuals do not like having an external source dictate when to exhibit affection.

However, some may "put up" with the holiday because of the perception that women enjoy it.

*"Vulnerable" consumers.* Some do not enact Valentine's traditions as they feel that this holiday is "wholly unnecessary" or simply just not needed to maintain a healthy relationship.

I personally do not make a big deal out of Valentine's Day. I know the traditions involved, and I have participated in some in the past, but at this point of my life, it's just another day. My husband and I just make it a point to spend some time together and eat dinner at the dining room table, instead of at the breakfast bar or in front of the television, I don't need anything fancy from him, because honestly, I like a 3 Musketeer's bar more than a box of expensive chocolates, and my husband brings home flowers at least once a month. [F, 38, Married]

Some believe that people in love are vulnerable consumers during Valentine's Day.

Valentine's Day is a spiteful marketing technique designed to take advantage of people in love! [M, Dating]

Push a "do a little something for yourself" campaign- quit marketing to people in love! [F, Dating]

The purpose of Valentine's Day within the larger society is to make a dollar on a useless holiday. They advertise all the 'touchy-feely' commercials and articles and make people believe that they have to do something special for Valentine's Day. You are way too in love if you get caught up in the marketing of Valentine's Day. [M, 21, Single]

The above set of quotes show how consumers resist experiences of feeling vulnerable and how consumers' experiences with marketing communication that reinforces spending at the expense of the holiday's true purpose. In this section, we have introduced six key consumer characteristics that are associated with market resistance. In the following section, we discuss four conditions related to the marketing communication environment.

## MARKETING COMMUNICATION ENVIRONMENT & EVENT CHARACTERISTICS

### Message Timing and Overflow

A lifetime of intake of marketing messages and ads for Valentine's Day contributes to a strong theme of resistance associated with message timing and overflow. Such resistance drivers have less to do with the messages themselves, and more to do with message timing and targeting.

*Holiday Creep.* The timing of Valentine's marketing bothers many people. Consumers think that the holiday marketing begins too soon after "recuperating" financially and emotionally from the main holiday season (termed "Christmas Creep").

They start placing candy on shelves and running TV ads on Jan 2<sup>nd</sup>! [M, 28]

I think marketing on special occasions are an overkill strategy for both males and females. Advertising for Valentine's Day starts months in advance, which is too soon. Christmas supplies come down only to be replaced with Valentine's merchandise. [F, 45, Married]

Advertising Valentine's Day is everywhere. About a month before, you start to see gifts and other things. Restaurants start advertising their meals to try to get consumers interested. Everywhere you go, you see Valentine's Day decorations. [F, 22]

They make us feel that this day is so special because during that month, advertisements are everywhere. [F, 22]

*Message Overflow.* There are not as many Valentine's-related messages as compared to other holidays; however, they are often high frequency within a very small window of time. Consumers perceive message overflow. One woman in reference to the "continuous" marketing references writes, "they make me dread it" [F, 21]. Other resistance regards with the targeting of ads specifically at males.

I see a lot of ads on TV targeted at men to buy things for women. Most ads go something like 'don't forget to get that special someone a \_\_\_\_ for Valentine's Day'. [M, 22, Dating]

Others are concerned that the marketers find a way to route the demand through the female:

Ads in stores, magazines, and newspapers are mostly targeted at men reminding and advising them what to get their wife/girlfriend. I feel that the ads to women are mainly to get them to want something in turn getting their boyfriend/husband to buy it. [M, 23, Dating]

However, this idea can work the other way. Trends in gift reciprocity may translate towards more balance in gender targeted marketing efforts.

I believe that this day is marketed more towards men than women. However, it does seem to be shifting towards unisex marketing. [M, 30, Dating]

Although message overflow stems from the timing and targeting of the messages, the messages themselves and the underlying commercialization of intimacy also facilitate resistance.

## Commercialization of Intimacy

Tainted love and holiday hype are two sources of resistance associated with the commercialization of intimacy.

*Tainted love.* The concept of the holiday is not a source of resistance; however, some believe that corporate empowerment has exploited and tainted the holiday.

I think it's so commercialized that it isn't even an enjoyable holiday. There is so much pressure put on couples to do something special and unique and to give each other more extravagant gifts. It seems that the jewelry stores have jumped on the greeting card bandwagon and promote jewelry as the premiere Valentine's Day gift to give. I know that women often talk about what their boyfriends/husbands gave them or did for them on Valentine's Day. I am sure that it must be completely miserable for most men, since so much is expected of them, and they don't even know exactly what they are supposed to do. I do not really care that much for Valentine's Day, but I do enjoy the opportunity to spend a little extra time with my husband and doing something slightly out of the ordinary—like cooking a special dinner and eating at the table.  
[F, 36, Married]

I love the concept of the day, but I HATE how it is one of those corporate holidays.  
[M, 5-20-04]

All the businesses are trying to do is get your money and commercialize what should be done all year long—love. [F, 23]

Consumers value the intimate one-one-one time more than the corporate convenience that they may depend upon other times of year.

(I value) more of a romantic dinner (compared to a burger at McDonalds) and a romantic setting (references the candles). I think one on one time is nice instead of being in an over crowded loud restaurant. [F, 22, Dating]

Specifically, some have an aversion to commercialization of intimacy and love— natural emotions that commercial efforts tarnish or overshadow.

Of all the wonderful (silent sarcasm intended) years of my ever-joyous life, I've come to some quite obvious realization that Valentine's Day is nothing more than a commercial holiday they exploit to drastically nauseating proportions. If someone is looking for a single day to share with that special someone, do it on their friggin' birthday. You should be more worried about the fact that you're alive, rather than if you're going to get a ton of chocolates or flowers from your significant other. To all those who have found their special someone in their life, I bid you congrats. However, for those of us who are still looking, like myself, I bid this past day a big...!

[M, 2-15-01]

Some feel that the commercialism has become a focal point of the holiday.

Valentine's has become a day that corporations in the U.S. exploit just to sell candy and novelty items. [M, Dating]

"It's a corporate holiday. Why designate a day to show you care except for monetary gain?" [M]

*Holiday hype.* Many holidays are associated with consumption—even the intimate holiday.

I generally dislike holidays. I'm not a typical "consumer" and that's what all holidays have become vehicles for... consumption. [M]

Some feel that the commercialism associated with "celebration" or "party days" such as Halloween, Mardi Gras, or St. Patrick's Day is acceptable and just a part of that holiday.

St. Patrick's Day involves much socializing of a somewhat similar kind...the ritual of going out to drink and chat at bars. Of course, this ritual is fairly common in many places, but on these days, the socializing is marked by a certain awareness that it is a special day. Mother's Day and Father's Day are similar, in the sense that you are focusing your attentions on some special person. While on these two days, the focus is exclusively on mothers and fathers, while Valentine's Day may have a wider embrace. [M, 34, Single]

However, consumers who are in romantic relationships generally do not seek the mass-market appeal and celebration. Some see the commercialization as a stimulus to numb the holiday hype with alcohol:



(I start) drinking, because everything you see around V-day is about happy couples. [F, 21, Single]

I went drinking margaritas at El Maguey for Valentine's Day. [F, 24, Single]

Some are frustrated about the holiday hype and witnessing friends "fall into the hype."

Another Valentine's Day has gone by only to leave me wondering **why**?!!? Why do people get hyped up over a senseless holiday of commercialism? I made the effort of going to town and managed to see my friend, in Wal-mart of all places, getting something for his better half. I was semi-frustrated about this. This guy is the same one I spend about every Superbowl Sunday with, belching and doing the male bonding thing with. To see him buying something 'lovey-dovey' definitely makes me \*\*\* ...! [M, 2-15-01]

The holiday has the power to convert (temporarily) some masculine, football-watching belching men to a softer side. Jealousy, which may stem from friends and other love ones when priorities change along with the development of a romantic relationship, is especially apparent this time of year. Businesses and corporations, such as Wal-Mart, foster frustration as consumers perceive that they have too much power during Valentine's Day.

### **Corporate Ownership**

Resistance further comes from consumers' experiences with businesses that consumers claim to "own" the holiday or certain aspects of it. Consumers attribute blame to marketers and retailers in general, as well as to entire industries and specific businesses.

*Blaming marketers and retailers.* Some of the blame falls on marketers, who “guise the holiday” as a “marketing tactic.”

Valentine’s Day is a spiteful marketing technique designed to take advantage of people in love! [M, Dating]

Other blame goes to retailers in general—even if they have nothing to do with the holiday.

I feel that retailers shaped Valentine’s Day in a negative way—instead of making it about celebrating the person/people you love, it is about buying silly gifts and heart shaped items (that you never use). It is over-marketed and can make people feel bad if they don’t have someone.” [F, 23, Engaged]

Retailers shape Valentine’s Day by advertising that you must buy something for that special someone. Not to mention the cards they make for kids to take to school, so they hook you when you are young! [F, 21, Dating]

In some ways, retailers are not responsible for commercializing intimacy; however, they are the messenger as they provide such goods. Retailers are visible and thus are easier to blame as the benefactor of their annual financial obligation and “romantic relationship report card.” It does not help retailers that this day comes between two other times of financial obligation—the main holiday season and tax time.

*Holiday Ownership.* Others blame certain industries and product categories that consumers associate with the holiday. Resistant consumers frequently mention greeting cards, confectionary, jewelry, and the floral industry as a creator of this holiday.

Valentine’s Day is a GREAT marketing scam by the greeting card people. [M]

Valentine’s Day is a marketing strategy by the candy companies. [M]

The flower industry spends millions on advertising. So does the jewelry business. They are saying we must buy these things in order to feel love from someone.  
[M, 38, Married]

I think that conceptually it is a great idea, however due to overmarketing by greeting

card companies, the flower industry, and the like that you should show the person you love how much you care. I am not a huge fan of Valentine's Day. [M, 21]

Hallmark, the floral industry, the jewelry industry, and the candy industry have managed to transform this beautiful concept—people expressing their love for each other in a public way—into feelings of stress, inadequacy, and dashed expectations. Why is it that while a simple 'I love you' suffices for 364 days of the year but lavish gifts and declarations are required on this one day? [M, 46, Married]

Other resistant consumers attribute blame to specific businesses—notably Hallmark.

Hallmark has done an excellent job creating a holiday strictly for women. [M, 20, Dating]

They (marketing messages) sometimes make me sad b/c I have no one. Or I think what a great Hallmark money-making holiday. [F, 21, Single]

I am required to perform such rituals or I will never hear the end of it. Hallmark created these ideas for me so that I could spend more money on things that die in I less than a week. [M, 24, Dating]

No! I do not like Valentine's Day. I think that it is a Hallmark Holiday. [M, 23]

At the same time, such retailers provide consumers with the gifts that may ultimately bring joy to the gift giver and recipient. It is interesting that consumers did not mention this (or even thank?) retailers or marketers for providing them with the message and goods to carry out their behaviors (or anti-behaviors).

From a power perspective, although the resistance is multi-tiered (i.e., marketers/retailers, industries, specific retailers), the individual consumer still would like to have the power over when, how, and why they exhibit acts of kindness and affection to loved ones.

I don't respond willingly to others' expectations of how I should behave, unless I find their expectations to be reasonable. The notion that one should be more romantic on this day than on any other random day of the year does not strike me as reasonable or natural. In fact, romantic gestures, which are only responses to explicit expectations, do not strike me as particularly romantic at all. [M, 33, Single]

The power to exhibit behavior in line with personal beliefs, and not external forces, is a common theme. If one wants to be romantic, he or she has the power to do so anytime—enacting traditional “romantic” gestures on February 14<sup>th</sup> is anything but romantic according to the informant cited above. His belief implies a silent paradox of this holiday. Technology is an additional area that consumers equate as a buzz-kill to romance.

### **Tradition versus Technology**

Emerging technologies and technological evolution (Sood and Tellis 2005) are a final facilitating condition for consumer resistance. Consumers resist innovations (Bagozzi and Lee 1999) partially because of an aversion to change and having to master new technologies (Ram 1987). At the same time, organizations can employ strategies that focus on reducing consumer resistance (Ram 1989) E-cards and the digitization of tradition, e-commerce glitches, trendy technology, and online communities are main areas of focus.

*Nostalgia, E-cards, and the digitization of tradition.* Love letters and poems are classic forms of communicating love for which some people act nostalgic. However, technology makes the communication process more efficient (albeit less romantic in the eyes of many informants). The evolution of technology for this holiday is perhaps most apparent with “the valentine” card. Consider the following evolution; handwritten letters became phased out by mass-produced printed cards (1840). Then, customized card retail “booths” appeared as an attempt to let the consumer co-create the greeting card (1990’s).

These booths did not last, as they fell short to the power of personal computing and the Internet's assistance in making valentines. Currently, e-cards or "virtual valentines" (the modern version of an interactive valentine) enable consumers a (often free) way to create their own Valentine, modify it, and automatically send it to loved ones on a pre-specified day. The virtual valentine is a digitized version of a classic valentine that comes with a reminder service. E-tailers provide the ability to enclose e-gift certificates (e.g., Godiva.com, Hallmark.com). Such a digitization of tradition is an area of resistance for some—even for the e-tailers.

We have gift certificates available online. We own a company called Gift certificate center.com, where you can get gift certificates to about 400 different retailers, dining establishments and entertainment venues. You can either attach that gift certificate to an e-card or you can send it to through the mail....We sent our own secretary an e-card with a gift certificate and it got screened out in our own e-mail! It ended up in junk mail. We had to call in to find out if she had gotten it, and then ask them to send it in another form so she would get it. [Retailer]

Consumers perceive the virtual valentines as trendy technology. Unlike the traditional letters or cards that are often saved as a memento, virtual valentines are "rarely even saved" in e-mail accounts. Tangibility and the ability to save are each important in the context of romantic exchange.

*E-commerce gripes and glitches.* Consumers resist e-commerce attempts in unique ways. Some avoid using making purchases online because it is a procrastinator's holiday. Many shop the day before or the day of, so even overnight shipping service cannot overcome consumer procrastination. In addition, browsing in person for the romantic gift is important and is difficult online, unlike in the aisles of traditional stores.

I know that stores like Target and Wal-mart have a special aisle for holiday goodies. When I go in and see these aisles it helps to get me excited about the upcoming holiday! Internet pop-ups usually advertise a dozen red roses for a low price. They also put links on sites like msn.com and yahoo that help you find the perfect gift for him or her. I look at those because I think they are definitely interesting to look at. [F, 21]

The Internet serves as a generator of interesting gift ideas and ways to modify the mass-commodified market. Another main way that consumers use the Internet for Valentine's Day is to interact with other consumers via e-communities.

*E-communities and computer-mediated-communication.* Consumers use virtual spaces to share gift ideas and their romantic stories. However, e-communities also serve as a "place" to interact with others during the holiday season (e.g., for sympathy, expression, companionship, venting, elitism) to cope, or to electronically "e-date."

I've spent this Valentine's surfing the net, looking for sites about love sucking! My boy of 4 years broke up with me about 1 month ago; he is with someone right now...DEATH TO VALENTINES! [F, 2-15-00]

I want to urge everyone to join me in sending hate mail instead of Valentine's on this wonderful day. It makes you feel better. I promise. [F, 2-15-00]

Sending hate mail instead of Valentine's is an extreme form of market resistance in the Valentine's Day context. It is one example of using technology to regain control. The idea that technology controls individuals during Valentine's Day contributes towards resistance. Consumers feel that they should control technology—not the other way around.

A final common use of CMC during this time is through electronic dating. E-dating is a way to use technology and specified online communities to find a companion. Posts

near Valentine's are common, and many reference the aversion to being alone on Valentine's Day. For example, consider the following e-dating personal ad, posted in the afternoon of Valentine's Day 2003:

I am looking for cute, hot, single boys between the ages of 23-27 to hang out with. You must be my definition of "hot," which means definitely geeky, preferably with glasses. Even though I am not looking for a relationship, or even sex, you have to be funny, smart, witty, sarcastic, and awesome anyway, because really, you never know, and besides, I don't want to be bored. If you shop exclusively at the GAP, Structure, or Banana Republic, I am probably not your type. If you are vegan or have ever had the words "mod" or "emo" used to describe you, don't even talk to me. I hate fanatical belief pushers and I prefer people with musical taste.

I hate being alone on Valentine's day and am looking for someone funny to hang out with and possibly make out with so that I don't end up working my way through the better part of the local bar's alcohol supply. If you are just looking for sex or desperate for a girlfriend, don't even waste either of our time. (I mean, I am desperately looking for a boyfriend, but hey, it's my personal ad, ok? Go write your own, what do you think this is easy?) Try to be funny and entertaining too, otherwise, I am likely to just trash your mail and then neither of us receives a benefit.

P.S. If you don't include a picture, I am not going to respond. I don't want to waste time, as I stated before. If you respond with the standard personals drivel, I will post your email on the internet and mock you mercilessly.

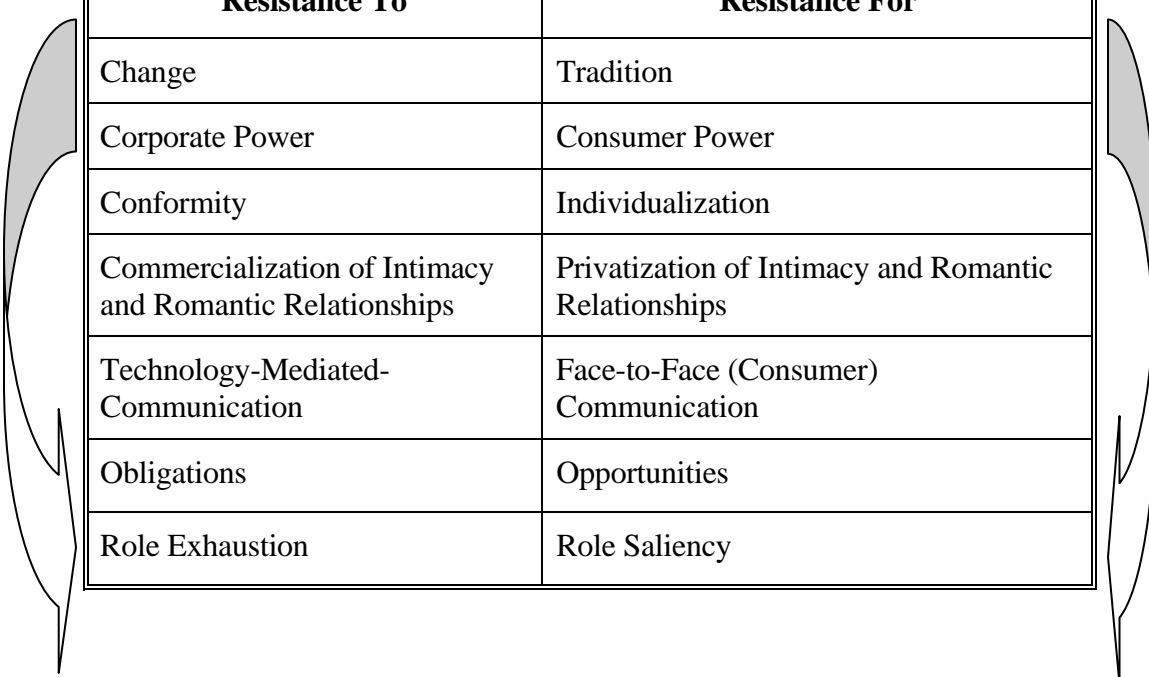
New applications of consumer technologies (e.g., e-date personal ads, the virtual valentine), in some cases, heightens resistance or makes the extant resistance more visible. Information technology, such as the Internet, bands people with similarities together in electronic dating (e-dating) exchanges (Close and Zinkhan 2004). Furthermore, consumers with similar resistance easily find one another in chatrooms or other virtual communities. For example, a woman who became single on Valentine's Day is able to find others in similar situations in virtual communities and spread resistance towards the holiday. In other cases, anti-materialists may find each other online and share anti-gift certificates.

Technology may also speed resistance cycles. Although Valentine's Day comes just on February 14<sup>th</sup>, consumers can find resistance communities online at any time during the year. With technology, resistance has the ability to spread like a virus and at the same time mediate consumers' creation of new trends, rituals, and traditions.

### **Purposeful Resistance and Consumer Creation**

A final objective of this study is to show if and how consumers are moving towards something with their acts of resistance. Resistance during this holiday has a meaning and a purpose. Most consumers choose alternative traditions for this day (e.g., celebrating it on a random Tuesday; devoting it to their children instead of their partner; staying in and watching horror movies with friends; enrolling in singles' gift registries) with the idea or movement towards creating something new (table 5.5).

TABLE 5.5: RESISTANCE AND CONSUMER MOVEMENTS



<b>Resistance To</b>	<b>Resistance For</b>
Change	Tradition
Corporate Power	Consumer Power
Conformity	Individualization
Commercialization of Intimacy and Romantic Relationships	Privatization of Intimacy and Romantic Relationships
Technology-Mediated-Communication	Face-to-Face (Consumer) Communication
Obligations	Opportunities
Role Exhaustion	Role Saliency



Gender Roles	Gender Role Equality or Reversal
--------------	----------------------------------

As shown in table 5.5, sometimes, consumers physically create something new that is not traditional (e.g., a virtual valentine; a homemade certificate for a back rub; an original recipe of heart-shaped meatloaf). Other times, consumers create new ideas and other non-tangibles with their resistance. For example, one couple creates a tradition that February 15<sup>th</sup> is the new Valentine's Day.

"My wife and I celebrate Valentine's Day a little differently. We are very romantic with each other throughout the year. For example, we celebrate our wedding day with month-a-versaries (rather than anniversaries) since we have too much love to celebrate just once a year. On Valentine's Day however, I toe the expectations line. Flowers, cards, and gifts are all in my repertoire. Our change from the normal ritual is that we go out February 15<sup>th</sup> since restaurant reservations and babysitters are much easier to find. My wife always protests that I overdo it on Valentine's Day, but culture has drummed into my head the need to do these rituals or pay the price."  
[M, 44, Married]

He follows recognized Valentine's traditions, such as card exchange, flowers, and a date; however, he resists the assigned date. Thus, he and his wife have a tradition of creating a new day just for them. Others re-invent the day from a day to celebrate romantic love to a time for familial love. It becomes a day to celebrate family.

It (Valentine's Day) is fun but when you are dating someone you tend to do the same things. I think my family thing is more meaningful. [F, 23, Dating]

Because many consumers recognize at some level that meaning comes from togetherness more so than the material exchange for this holiday, some create the ritual of using holiday anti-gift certificates (recall figure 5.1). These anti-gift certificates are often homemade, yet other times organizations (e.g., AdBusters), or other resistant consumers share them online in a P2P environment.

Another consumer creation that emerges from resisting the market norms is a way to make otherwise bland utilitarian goods more notable. For instance, consumers attempt to transform everyday items (e.g., socks become “Valentine’s socks”).

My mother would use Valentine’s Day as an opportunity to buy us clothes or something we needed, but couldn’t really afford. We were not wealthy, and so I remember ‘Valentine’s Socks’ or ‘Valentine’s Tennis Shoes’. [F, 41, Married]

This transformation is especially important for those who include their children on this day, yet resist the marketed candy, toys, or other terminal gifts.

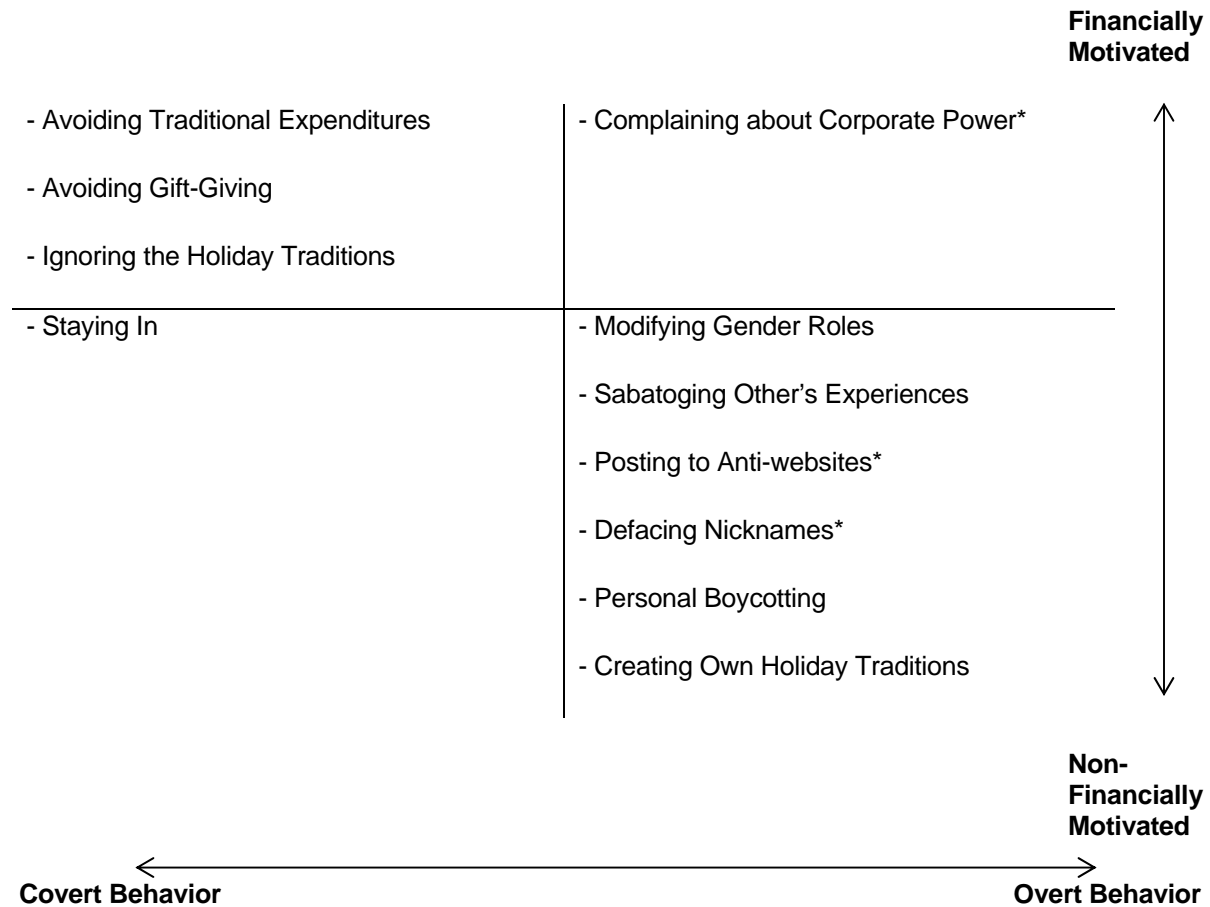
Some consumers do not celebrate or partake in the holiday’s traditions, although they create a sense of female empowerment or equality. As Valentine’s Day is traditionally a gendered (female) holiday, some create a sense of strength in knowing that they do not have to celebrate a gendered holiday.

I don’t celebrate Valentine’s Day. I realize that it is a holiday and it is meant to be celebrated. It was not meant to be gendered, but society has turned it that way. If someone opts not to celebrate or doesn’t like the holiday, then that is their own decision. We shouldn’t be catered to, though. [F, 21, Single]

Resisting the traditions associated with an entire market such as Valentine’s, is not necessarily a source of tension, conflict, or control; yet, it is often a source of consumer creation. Consumers, create “new old-fashioned ways” (Santino 1996) along with their acts of resistance in the marketplace.

We conclude the empirical findings section by introducing a figure including some examples of market resistance along spectrums of financial motivation and the overt or covert nature of the behavior (figure 5.3). Although many of these behaviors have an element of financial motivation associated with the resistance, we find that the primary motivations to exhibit acts of market resistance are for reasons beyond financial.

FIGURE 5.3: MARKET RESISTANCE: VALENTINE'S DAY EXAMPLES



\* These entries represent Negative Word-of-Mouth (WOM) behaviors.

\*\* Note: Some entries do also have financial motivations; yet, the primary motivations are beyond financial.

### EXPANDING RESISTANCE THORY

These findings extend four key areas of resistance theory. As introduced in the earlier section, these areas include: a) avoidance, b) reactance, c) directive non-

compliance, and d) ambivalence to change. We then further the discussion on the role of consumer creation as a part of market resistance.

### **Avoidance**

Past theory states that resistance entails avoidance of unpleasant feelings (Perls et al. 1951). Consistent with past theorists, we find that consumers who report unpleasant feelings or experiences associated with Valentine's Day avoid the holiday traditions in the formal marketplace. However, facilitated by the growth of electronic environments, however, we see a counter trend emerging. Using new communication media, consumers who avoid the traditional marketplace often find new "places" (e.g., in electronic environments) to share negative feelings (e.g., via electronic word-of-mouth). Thus, we broaden Perls et al. (1951) finding of avoidance of negative feelings into the digital age by making the distinction that consumers do not avoid their negative feelings completely. In turn, they often create new channels for the negative feelings that are less apparent in the traditional, onground marketplace.

### **Reactance**

Reactance refers to the human desire to counteract someone else's attempt to limit one's choices (Brehm 1996). In prior research, this "someone else" usually refers to another person. However, our findings indicate that the "other" can also include non-human (holiday obligations, corporations) limitations of consumer choices for this holiday.

A second way that we broaden understanding of reactance is by extending the time-frame. Prior studies demonstrate consumer reactance to persuasive (advertising) claims—specifically to one particular advertisement. We focus on understanding reactance to a lifelong accumulation of holiday experience.

### **Directive Non-Compliance**

Extant theory states that resistance entails non-compliance with a directive (Newman 2002). In other words, people resist while moving towards something meaningful to them. We find support for this theory as consumers are moving towards creating new alternatives for traditional behavior. We find that market resistance is not necessarily a negative behavior or a “dark side” of this holiday. Instead, consumers show purposeful resistance—some of which is positive (see table 5.5).

TABLE 5.5: RESISTANCE WITH A DIRECTIVE

Resistance Against ←	Resistance For →	Example
Change	Tradition	A man continues to take his wife to the same restaurant each Valentine's Day, despite other options because "its our tradition."
Corporate Power	Consumer Power	A man does not purchase for Valentine's Day to show that he has the power to do so.
Conformity	Individualization	A man avoids buying roses and chocolates and instead fills his girlfriend's ipod with her favorite songs.
Commercialization of Intimacy	Privatization of Intimacy	A couple resists the "romantic restaurants" and chooses to stay home and cook together.
Technology-Mediated-Communication	Face-to-Face Communication	A woman sends her e-Valentine straight to junk mail and instead expects her boyfriend to hand-deliver a card.
Obligations	Opportunities	A man does not purchase Valentine's gifts for his girlfriend because he "has to."
Role Exhaustion	Role Saliency	A mother only involves her children for the holiday because it is overwhelming to cater to her children, husband, mother, sister, in-laws, female colleagues and single friends.
Distinct Gender Roles	Blended Gender Roles	A male is resistant to buying an expensive necklace and only receiving a card in return last year, suggests he and his girlfriend each chip in for a weekend vacation.
Complexity	Simplicity	A couple avoids the gift exchange and date arrangements and opts to stay home and revisit their photo albums.

On the one hand, consumers resist during Valentine's Day. On the other hand, they create new traditions, meanings, and holiday trends. For example, some resist the traditions on February 14th, and instead choose a random time (e.g., June 9th) to celebrate "Valentine's Day." This kind of creation is unique to an intimate holiday such as Valentine's, because other main holidays such as Thanksgiving and Christmas involve the extended family and the community at large (e.g., trips to visit family, Santa visits at malls, recitals of "The Nutcracker").

Consumers also create new ways to celebrate the day. Instead of the traditional dinner and romantic card/gift exchange, and sex, some consumers re-create the holiday as a day to spend with friends.

### **Ambivalence to Change**

Here, ambivalence refers to uncertainty or indecisiveness as to which course to follow. In past conceptualizations, resistance entails a feeling of ambivalence about change (Arkowitz 2002). Past conceptualizations of ambivalence often include coexisting opposing attitudes. However, our findings indicate that, in the current context, consumers are certain about which course to follow. Furthermore, they are often either pro-change or anti-change. The two polarities often do not coexist within a person. That is, with little in between, people have strong opinions and are highly involved with this holiday at various points in their life. Thus, we re-consider the past theory that consumers are ambivalent to change (Arkowitz 2002) in the context of marketplace traditions.

A small portion of informants is very passionate to maintain current holiday traditions. For example, some men feel very strongly about maintaining their ritual of giving their wife roses, dinner out, and alone time each February 14. The majority of informants, however, are very passionate about their power to change or re-create market traditions. Recall, for example, the couples that resist the assigned holiday date and change the holiday to a day of their choosing. We find that consumers commonly welcome a change in holiday tradition and sometimes to serve as change-agents. Often, this change advocates bringing romance and meaning back to a day where many feel that the overt commercialism nullifies sincere romance. These consumers create new rituals, such as singles nights with friends and horror movies or attending singles gift showers. Often, they use the Internet to share new ideas, rituals, and encourage others to join the change.

### **Consumer Creation and Purpose**

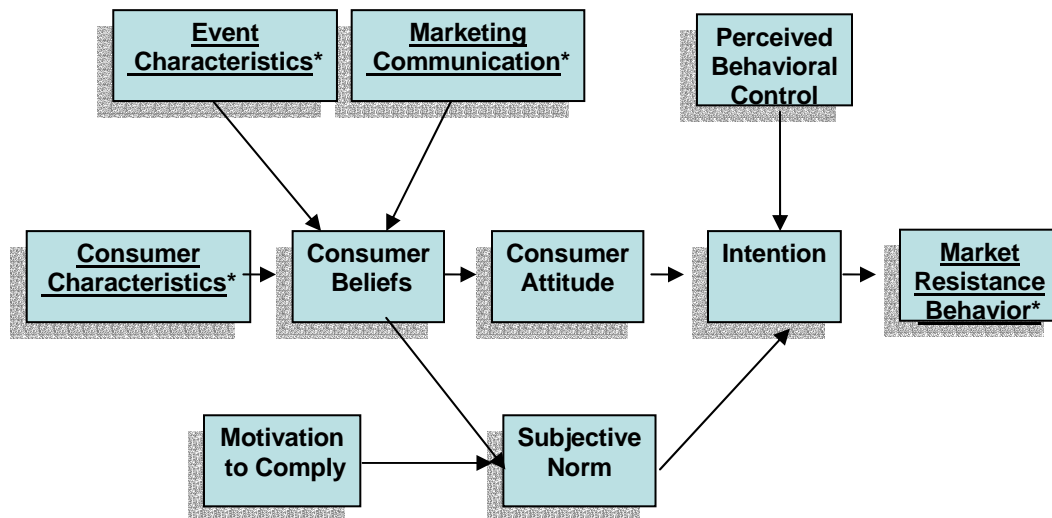
Now, considering each of the areas as a whole, we further acknowledge the role of consumer creation with market resistance. Consumer creation co-exists with the new environments to share unpleasant feelings, reactance to non-human attempts to limit one's choices, directive non-compliance, and passion either for change. Along with acts of market resistance, consumers create new traditions, meanings, rituals, and trends. For example, consumers create an original holiday a new date, girls' night out, singles registries, drinking nights, horror movie nights, male bonding days, and even retail boycotts.



## TOWARDS A THEORY OF MARKET RESISTANCE BEHAVIOR

We now embed the themes of marketing communication, event characteristics, and consumer characteristics into a broader, theory-based, framework (see Figure 5.3). This framework is based on both prior literature and current findings. Specifically, we incorporate both the classic Fishbein (1979) attitude-intention-behavior model (i.e., the theory of reasoned action) and the extensions of this model by Azjen (1991) (i.e., the theory of planned behavior). The dependent variables (i.e., consumer beliefs, attitude, intention, behavior) operate in a causal chain (Fishbein 1979). Building on this framework, we suggest that many factors (i.e., consumer characteristics, event characteristics, the marketing communication environment) contribute to market resistance behavior.

FIGURE 5.3: TOWARDS A THEORY OF MARKET RESISTANCE BEHAVIOR



\*Main focus of the current study.

### Theory of Reasoned Action (TRA)

Fishbein (1979) and Ajzen and Fishbein (1980) combined to create the theory of reasoned action (TRA). The TRA is a classic attitude-intention-behavior model relating to voluntary behavior. An assumption is that rational consumers consider the possible outcomes of their behaviors before they act. The basis of this model is as follows: external factors (e.g., demographics, personality traits) determine a people's:

- 1) beliefs about the probability that their behavior leads to a given outcome (i.e., the consequences),
- 2) evaluation of each of those consequences,

- 3) beliefs about what specific individuals or groups think, and
- 4) motivation to comply with those individuals or groups.

The first two describe a person's attitude toward the behavior. The second two describe the subjective norm. Attitudes and subjective norms, combined with relative importance weights, lead to a person's intention. Intention is the cognitive representation of a person's readiness to undertake a specific action. Intention, then, leads to behavior (in this case, market resistance behavior).

### **Theory of Planned Behavior (TPB)**

Ajzen and Fishbein adapted the TRA to create the theory of planned behavior (TPB). Ajzen pointed out that people believe that they have a certain degree of control over their behavior or situation. Ajzen (1991) added that people's perceived behavioral control leads to intention. We choose to build on the TPB (rather than the TRA) because resistance behavior is not necessarily voluntary.

### **Contribution to Extant Theory**

To build on the TPB, we add consumer characteristics (e.g., exclusion, low need perception), event (i.e., holiday) characteristics, and related marketing communications. Recall figure 5.2, which illustrates these characteristics. In this study, we uncover six areas of consumer characteristics that lead to market resistance behavior. These include: 1) unfulfilled expectations, 2) exclusion, 3) materialism and terminal gift syndrome, 4) obligations, 5) role exhaustion, and 6) low-need perception. We propose that consumers

are less likely to resist the traditional Valentine's market after experiencing marketplace events that offer low-key celebrations of the holiday (versus experiencing events that offer high-maintenance celebrations). Such high-maintenance celebrations may foster unrealistically high expectations during the holiday for future years.

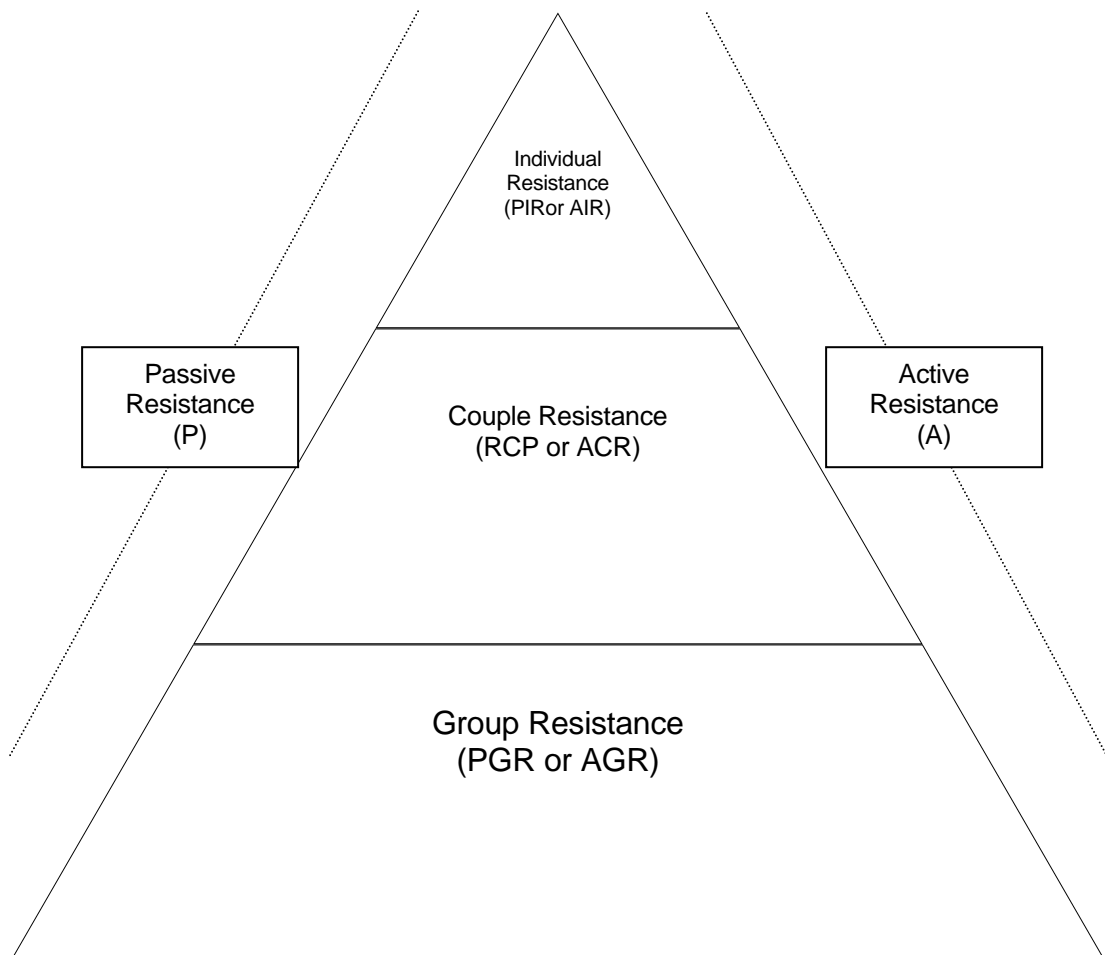
We also identify drivers related to the marketing communications environment and "event" characteristics. Themes that relate most to marketing communications are 1) message timing and overflow and 2) tradition versus technology. For an example of message timing, many informants complain that the messages are coming earlier and earlier each year. Informants also note that they are just receiving their credit card bills from Christmas when the ads and in-store reminders for Valentine's Day appear. We propose that when a consumer receives the first holiday ad well before the mainstream holiday marketing efforts begin, then the consumer will associate any resistance of the holiday traditions with that associated advertiser.

Themes that relate to the event characteristics are 1) commercialization of intimacy and 2) corporate ownership. For an, example of commercialization of intimacy, a woman feels that a date should symbolize the romantic relationship with her husband moreso than the company that hosts the date or event. We propose that a consumer is less likely to resist a market event that entails options for individualization (versus standard, mass-commercialized market events). In addition to the consumer, event, and marketing communications characteristics, we note that situational factors, socio-cultural factors, and economic conditions facilitate resistance (see figure 5.2).

## DISCUSSION OF MARKET RESISTANCE

In this study, we advance knowledge about market resistance (i.e., associated with Valentine's Day). Some consumers resist pre-packaged solutions that retailers have developed. Others resist traditional holiday activities or the exchange of material goods. For example, a consumer may elect to refrain from exchanges or gift exchanges.

FIGURE 5.4: A TYPOLOGY OF RESISTANCE BEHAVIOR



As shown in Figure 5.4, three levels of resistance behavior emerge: a) single resistance, b) couple resistance, and c) group resistance. At the single resistance level, one consumer exudes behaviors of market resistance. For example, a man chooses to write song lyrics for his wife in lieu of traditional Valentine's Day expenditures. Couple resistance, however, entails both parties of the relationship dyad to resist the traditional marketplace. Recall one instance of the couple that chooses to celebrate the holiday on February 15<sup>th</sup>. This couple cites the less-crowded restaurants and discounted merchandise as key reasons for not celebrating the holiday on the day in which it is intended. More importantly, this couple shares a bond between them with the ritual that they have created. The third level of resistance is group resistance. In this case, three or more consumers gather and resist the traditional marketplace and related activities.

At each level, there is a "passive resistance" or "active resistance." Acts of passive resistance, or "opt-out" behaviors are often less noticed. In many cases, consumers opt-out of the market, or passively let the holiday go by without recognizing or celebrating it. We illustrate each type of resistance with examples from our data. In an instance of passive individual resistance (PIR), one man decides to ignore the holiday and treat it as if it were any other day. A couple that quietly stays in and does not recognize the holiday in traditional ways is an example of passive couple resistance (PCR). Passive group resistance (PGR) is less apparent. By nature, group resistance is associated with directed-non compliance and gathering together in efforts of a recognized movement. However, a group of women gathered to go see a horror movie on Valentine's Day (in lieu of attending a Valentine's Day singles event or spending the evening with their romantic partner).

Active resistance, however, is apparent when a person, couple, or group resists the market, and attempts to make this presence known. Active resistance is associated with involving others in the quest of creating and enacting new trends and rituals. Active resistance entails a schema and a script for action. An example of active individual resistance (AIR), one man takes a “Valentine’s Day hike”. We see active couple resistance (ACR) for instance, when a couple (or a similar two-party relationship) exchanges an anti-gift certificate, or verbally agrees not to exchange gifts. In turn, they create a ritual to exchange this anti-gift certificate each year for this holiday. In some cases, the anti-gift certificate ritual spreads to other holidays and other occasions for celebration (e.g., anniversaries, weddings, birthdays, graduations, religious ceremonies). When an entire family or other group shares these new rituals, it is a case of active group resistance (AGR). In other examples of AGR, entire groups (e.g., environmental activist groups, animal-rights groups, feminist groups) gather in person or online to avert marketplace traditions.

We find that people use the Internet to actively channel their attitudes and to share the ways in which they averted traditional holiday exchange. Recall one case where a woman describe the hate mail that she sent to the ex-boyfriend that dumped her on Valentine’s Day. She encouraged others who are in a similar situation to follow her and also send hate mail, and she suggested that doing so will make them feel better. Thus, with the Internet and online communities, an act of single resistance merges with others’ acts of single resistance. In turn, group resistance is apparent. The process of resistance is potentially self-sustaining.

We find that Valentine's Day sometimes arouses strong, often negative attitudes, such as jealousy or inadequacy, which may trigger resistance to its traditions and rituals. In this sense, consumer resistance is related to "big business." While a formal boycott of the holiday is extremist in this context, it is more common for individuals, couples, or groups to boycott certain retailers during this holiday. Informants consistently cited two large retailers, Hallmark and Wal-Mart as a source of their resistance during this holiday. The other companies and retailers that were mentioned in the realm of resistance include Victoria's Secret, Godiva, Dom Perignon, Bulova, and Hilton. No local companies or boutiques were cited by informants as a source of resistance during this holiday.

Of course, not all consumers dislike the holiday traditions and resist them. Some consumers anticipate the holiday and its associated marketplace activities (e.g., dating, gift exchange, attending shows or special events) and customs. For instance, some informants see this recurring event as a way to spark an otherwise dulling routine. Others see this holiday as an excuse to lavish themselves of their partners. Other informants cite Valentine's Day as a time to set aside for creating cards and crafts with their children and as a way to share these creations with friends and family members.

### **Implications for Retailing**

Retail resistance is apparent when consumers intentionally stops patronizing a specific store or e-tail site. For instance, in this study we see evidence of our informants having a strong dislike for Hallmark, and they avoid its offerings—including the free virtual Valentines on [hallmark.com](http://hallmark.com).



We develop four specific implications for retailers. First, retail managers, as documented in the interviews, demonstrate a tendency to view Valentine's shoppers as parts of a homogenous "one size fits all" segment. In reality, consumers represent distinct sub-groups with different resistance-drivers (unique to Valentine's Day). For instance, consumer experiences from past holidays and relationship status/time with current partner are important variables to incorporate into a communications strategy.

Second, stemming from resistance theory, retailers should recognize "excluded" segments (e.g., singles, those in non-traditional relationships, geographically separated couples). Retailers could sometimes replace high-frequency, reminder advertising with event marketing and related promotions (e.g., with singles' gift registries, singles events, e-dating sites) instead of traditional high-frequency reminder advertising to males in romantic relationships.

As a third implication, retailers may try to participate in the movement towards voluntary simplicity. At holiday time, many consumers choose to celebrate in low-key ways or celebrate the holiday outside the formal marketplace. For example, a couple chooses to stay in, cook, and exchange appreciation for one another in lieu of celebrating at an upscale restaurant or exchanging fancy Valentine cards/gifts. Such actions of voluntary simplicity pose a potential threat to some traditional retailers (e.g., gift shops), but provide opportunity for others (e.g., grocers). For example, opportunities emerge for new products and services such as a "create your own valentine card kit" or a grocer delivered order of suggested items for a romantic dinner.

Twenty-first century consumers often desire to be involved in the creation of the final product, with simple and convenient additions. The concept of "homemade" is

popular as evidenced by informants positive mentions of slice and bake cookies and other goods that give consumers a head start. Just as a consumer likes to add an egg to a pre-packaged brownie mix, consumers can be more involved (and less excluded) by adding a personal touch to an otherwise mass-produced Valentine's Day item. This desire to assist in the "creation" may stem from childhood, when many children added a "conversation heart" or sticker to a Valentine and for certain classmates or teachers. Retailers can provide ways for children and adults alike to contribute to a "homemade" creation. Suggested inventory includes kits for consumers to make Valentines cards, items made with consumers' photographs, a la carte flowers and vases for consumers to create unique bouquets, specialty food items and baskets for consumers to create a romantic picnic, and items that are positioned to be engraved or embroidered. With these items, retailers may alleviate the source of resistance that is associated with exchanging conformed commercialized goods for unique, often intimate, relationships.

### **Limitations and Avenues to Extend this Study**

Given our research design, the data reported here are based on consumer behavior and retail practice in the U.S. and overall does not shed much light on the role of mediators or moderators. As is, this framework serves as a base for scholars to continue theoretical additions. We suggest avenues to extend these findings in two areas: market resistance in different stages of a consumer's life and cross-cultural extensions.

Few researchers have focused on what motivates people to acts of marketplace resistance or any other related outcome variables (e.g., self gift giving, setting price

ceilings, shopping procrastination) at different stages of life (e.g., childhood, adolescence, adulthood). Current findings suggest that resistance demonstrated against traditional holiday behaviors build from years of Valentine's Days beginning from grade school. In elementary school, Valentine's Day is an egalitarian holiday with gender-neutral exchanges of cards and gifts. How is it, then, that all of this has changed by the adult years, which now focuses attention on the female? Furthermore, why is it that females evolve to have such high expectations for this holiday? Behaviors learned at an early age are large contributors to rituals and meanings associated with a holiday. Nonetheless, these behaviors may evolve over the course of a lifetime and merit further study.

Cross-cultural research in the context of this consumer holiday is also needed.

Polonsky et al. (2000) studied Valentine's behaviors in Australia; however, more research should examine the potential of Valentine's Day emerging global holiday and consumer acceptance or resistance of the holiday market. The retail executives from international companies in the interviews brought up the opportunity and challenge that global consumer holidays present. Namely, gender roles are a key difference in the celebration of this holiday in other countries. For example, in South Korea, gender roles for this holiday are reversed, as is also includes a stated tradition for the female to provide a gift (e.g., and express her "hidden affections"). Key questions for scholarly research include: a) What are the common Valentine's gift rituals practiced, b) What are the gender roles associated with the holiday?, c) To what extent are these global consumption rituals?

Upon reflection of the findings reported here, it is interesting to consider a paradox that has emerged. Advertising and other forms of marketing communication generally

improve a specific company's sales performance during the holiday. At the same time, more advertising in the marketplace as a whole potentially contributes to message overflow and over-commercialization during the short time window for holiday, seasonal, and event marketing. As a result, resistance (e.g., in terms of voluntary simplicity, consumer rebellion) may increase with the passage of time. Dobscha (1998) points out that more research in marketing questions the symbiotic, exchange-based mutually beneficial relationship between consumer and marketer. Such research recognizes a possible imbalance of distribution of goods that may occur with powerful companies and their demonstrable media and information resources. At the same time, we note that consumer acts of purposeful resistance (such as behaviors reported here) may continue to spark new trends and traditions and serve as a step to bridge the gap between consumer-corporate powers in the modern marketplace.

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## CHAPTER 6

## CONCLUSION

## INTRODUCTION

### **Synthesis**

This dissertation focuses on consumers' use of information technologies (IT) in the context of romantic relationships. Each chapter explains the Internet's emergence as a consumer communication technology. Multiple, complementary methods are employed to address the research objectives. The findings have implications for theory, for marketing/retailing managers, and for consumers. This concluding chapter provides a synthesis of the study as a whole and makes suggestions toward a theory-driven path for future research. Specifically, this chapter includes:

- 1) key findings (i.e. related to the original objectives described in chapter 1);
- 2) new insights into communications theories and social exchange;
- 3) implications for managers (in the area of market resistance);
- 4) limitations and directions for future research.

### **Key Findings**

The key objectives and their related outcomes are illustrated in table 6.1. The goal here is not to rehash the findings of each individual chapter. Rather, table 6.1 is presented as a backdrop to cumulate findings across the studies.

Table 6.1

**Dissertation Objectives and Key Findings**

#	Objective	Key Finding(s)
1	To explore the use of the Internet to initiate and/or facilitate online and onground dating among young daters (Ch. 2)	<ul style="list-style-type: none"> <li>-E-daters use the internet to advance friendships (i.e., online exchange does not always precede onground exchange).</li> <li>-Ritualized purposes motivate aspects of e-dating.</li> <li>-E-dating entails more than goal-directed purposes.</li> <li>-Time and perceived efficiency are the major motivations to e-date.</li> <li>-E-daters use dating sites as screeners.</li> <li>-E-daters search for similar qualities (i.e., the opposites attract theory does not apply).</li> <li>-E-daters stress a salient role (e.g., profession) and downplay others (e.g., father) in their personal ads as a view of the self.</li> <li>-Geography is a top consideration in search behavior (i.e., suggesting that e-daters anticipate e-dating to progress to an in-person meeting).</li> </ul>
2	To reveal Internet daters' concerns and outcomes related to e-dating and CMC (Ch. 2)	<ul style="list-style-type: none"> <li>-There is a social resistance surrounding E-dating.</li> <li>-E-daters often do not admit that they use the Internet as a tool to establish offline dates, suggesting a social stigma with e-dating.</li> <li>-E-dating provides virtual space for consumer's naïve marketing (i.e., personal ads).</li> <li>-The internet serves as a confidence booster for some who would otherwise not approach a romantic interest.</li> <li>-The sacred space of the home is valued for e-dating; however, many e-date during work hours or evenings in lieu of going out.</li> <li>-There is little formal etiquette associated with e-dating as compared to the offline counterpart.</li> <li>-The dark side of e-dating includes cyber-stalking, misrepresenting one's self, and using e-dating sites to commit adultery or other legal infractions.</li> </ul>
3	To investigate Valentine's Day rituals, as enacted by various consumer segments (Ch. 3)	<ul style="list-style-type: none"> <li>-Rituals fall into the categories of: exchange of gifts and cards; showing affection; going out; preparing and consuming food/drink; grooming and clothing.</li> <li>-There is an element of consumer resistance to Valentine's Day -</li> <li>-Valentine's is a season to be reminded of one's "single status" or a time of self-reflection.</li> <li>- Distinct rituals are enacted for this situation (e.g., singles nights, self-gifts).</li> <li>-Distinct rituals constantly evolve with new technologies and trends.</li> <li>-Guilty last-minute shoppers often spend more.</li> <li>-Shoppers do not look for "sales" during this holiday as compared to other holidays.</li> <li>-Sale gifts trigger guilt, shame, and/or cheapness.</li> <li>-Non price promotions (e.g., loyalty programs) entice shoppers</li> </ul>

		who do not seek “sale” gifts for this holiday.
4	To explore Valentine’s Day from the viewpoints of retail and e-tail managers (Ch. 4)	<ul style="list-style-type: none"> <li>-Shoppers seek “us-gifts”- gifts intended for the couple.</li> <li>-Shoppers look for different goods depending on the length of their dating relationship or marriage.</li> <li>-Singles desire goods catered to them for this holiday.</li> </ul>
5	To provide a set of systematic implications for retailers and e-tailers (Ch. 4)	<p>Implications include:</p> <ul style="list-style-type: none"> <li>-Recognize and overcome consumers’ resistance to the mass-commercialization of the holiday for romance.</li> <li>-Recognize female gift-givers as buyers.</li> <li>-Stock more gifts appropriate for men during the holiday.</li> <li>-Stock inventory for alternative and non-romantic relationships.</li> <li>-Carry certain products that fit romantic love, friendship and child-parent love.</li> <li>-Carry collection pieces as a way to sell classic gifts and a unique overall collection.</li> <li>-Suggest appropriate gifts to prospective male buyers.</li> <li>-Encourage self-gift giving to females or singles.</li> <li>-Promote utilitarian nature of cards as a supplement to gifts.</li> <li>-Provide a way for individualizing the mass-marketed holiday.</li> </ul>
6	To identify and discuss key theories that have been developed to understand key themes relating to e-dating and Valentine’s Day (Ch. 2-5)	<p>Theories (and contributions) include:</p> <ul style="list-style-type: none"> <li>-Social exchange theory (extend into the context of CMC)</li> <li>-Materialism theories (introduce concepts of terminal gift exchange, instrumental gift exchange, and us-gifts)</li> <li>-Resistance theory</li> </ul>
7	To extend current theories and develop new theories in the area of consumer resistance (Ch. 4-5)	<ul style="list-style-type: none"> <li>-Extend past theories of resistance to “Market Resistance”</li> <li>-Extend into the context of a holiday market (online and on-ground)</li> <li>-Facilitating conditions of Market Resistance include consumer characteristics (unfulfilled expectations, exclusion, materialism and terminal gift syndrome, obligations, role exhaustion, and low need perception) and the marketing communication environment (message timing and overflow, commercialization of intimacy, corporate ownership, and tradition versus technology).</li> <li>-Three conditions (i.e., unfulfilled expectations, exclusion, and low need perception) stimulate market resistance and in turn are influenced by market resistance.</li> </ul>

As shown in table 6.1 resistance is a common theme across the chapters. The findings, as a group, provide insight in the areas of resistance to the commercialization of intimacy and ritualized behaviors. Consumers often resist traditional rituals and enact new



rituals, which constantly evolve along with new technologies. It is interesting to note how rituals sometimes emerge from acts of market resistance. In the contexts of dating and Valentine's Day, consumers resist aspects of the traditional market (recall figure 5.2). Conditions associated with market resistance are at the individual consumer level, the environmental level and the consumption society and culture as a whole. Singles and those in a geographically separated or alternative relationship feel excluded from a marketplace recognition and/or celebration. This exclusion is often internally imposed, as the "excluded consumer" makes the conscious decision to avoid the traditional market in lieu of completely ignoring the holiday or celebrating it in a more intimate fashion at home (i.e., voluntary simplicity). Those who do ignore the traditional market state a low need perception for a specified day to exhibit love, and for the holiday marketers who actively target the "vulnerable" consumers in love.

Holiday message overflow, as studied here, is not necessarily the result of one particular campaign or holiday season. Rather, it accumulates from a lifetime of marketing messages promoted during the holiday window. Specifically, informants stressed how consumers these messages commercialize and taint the purported intimacy. Consumers see the holiday as overtly commercialized, and specifically mention references to one or two retailers (and industries).

It is well recognized that people resist change, and this principle applies to the change from past traditions to new trends and technologies such as the e-card or virtual valentine. Consumers, at various ages, report a feeling of nostalgia about early-life experiences (in a time with less technological wizardry). Across studies, technology

serves as a tool for peer-to-peer communication. Participants in each study use the Internet as a catalyst to resist traditional marketplace behaviors and create new rituals.

### **New Insights into Communications Theories and Social Exchange**

New insights into communications theories in the context of social exchange arise. Social exchange theory (SET) assumes the consumer accurately anticipates the payoffs of different decisions (Thibaut and Kelley 1959). SET focuses on processes and rewards based on verbal (or here, e-text-based) exchange and not on non-verbal (or text-based) cues. SET predicts that positive outcomes (i.e., rewards) deriving from verbal communication exchange are incentives for relationship formation and facilitation. Thus, when rewards outweigh costs, daters show a higher self-disclosure (in breadth and depth of information). In turn, higher self-disclosure may increase relationship quality (according to Altman and Taylor's 1973 social penetration theory). SET recognizes the "bilaterally discordant" human dilemma of choice (Thibaut and Kelley 1959; Kelley 1979). That is, one party's (i.e., dater's) gain may result in another's expense. Social exchange theorists minimize the social/interpersonal aspects of dating as a social institution that are recognized here. It is important to note however, that the assumptions of SET are based on face-to-face communication (FTF).

As shown here, computer-mediated-communication (CMC) presents new choices in social exchange. CMC entails interaction with both the communication technology and with other end user(s). A first step in the consumer decision process is whether or not to

adopt the technology. In many ways, adopting e-dating technology enhances task efficiency when compared to online methods.

Compared to traditional offline methods, the Internet has the potential to streamline the dating process (Chapter 2). Consumers who access a rich medium exchange intimate and in-depth information (e.g., via personalization, multiple cues, immediate feedback, and/or jargon). The lack of physical presence (i.e., the possibility of anonymity, the use of pseudonyms) liberalizes consumer communication topics, diminishes time/space boundaries, and advances the speed and level of personal information disclosure with romantic interests. Informants tend to be more candid (more rapidly) via CMC than with FTF communication. Candid disclosure especially occurs in one's community (e.g., geographical, interest-based, racial, religious).

Past research finds that people are more likely to seek gratification from FTF communication than the Internet (Flaherty et al. 1998). In addition to seeking gratification, informants from each study indicate many other motivations for going on the net. With respect to e-dating, we find that a wide variety of goals and sub-goals are pursued. Some examples include utilitarian goals (e.g., finding a partner or spouse, status-seeking, or for entertainment, escape, humor, a work break, ego-fulfillment, relaxation). The Internet provides e-daters with an acceptable context for breaking the norms of gradual self-disclosure characteristic of FTF interactions.

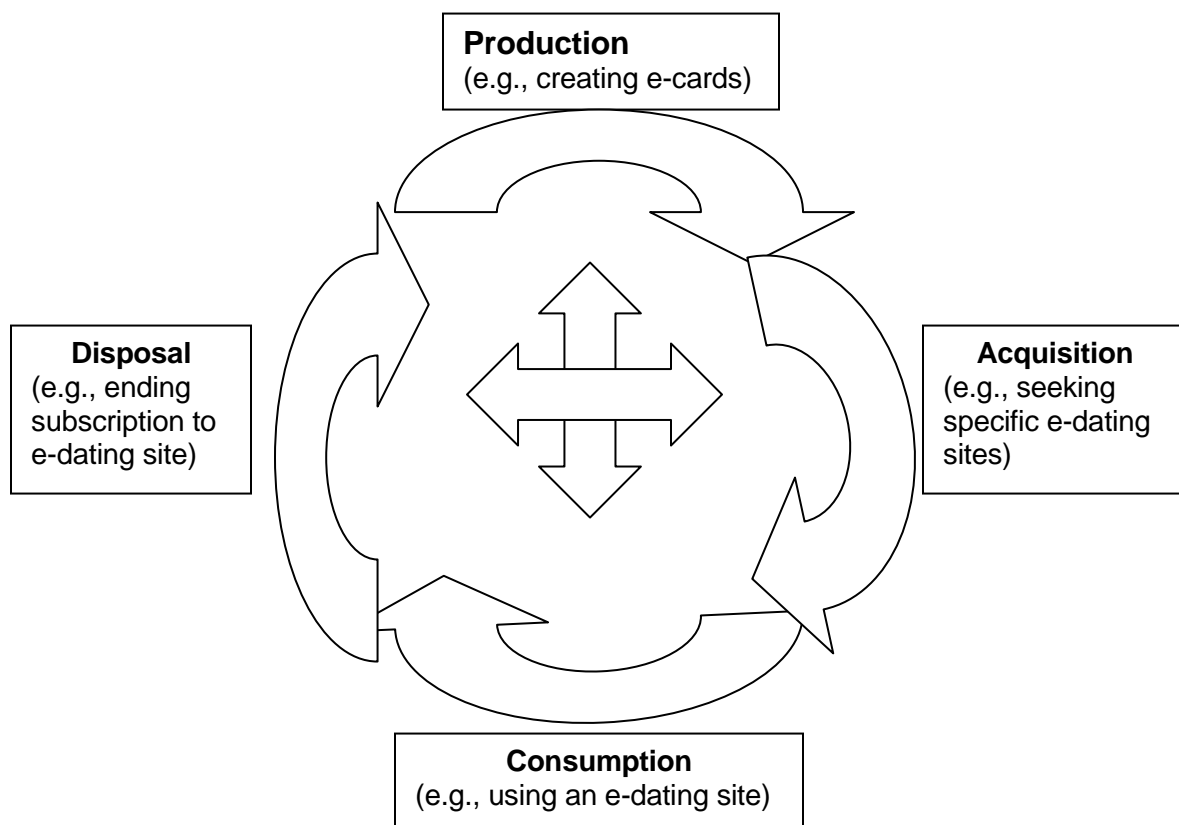
Often, aspects of e-dating and exchange during the Valentine's Day holiday are ritualized. Two common examples are searching on e-dating sites becomes a ritual for

some on certain nights a week, and creating e-cards for loved ones each year. In the following sub-section, the circle of consumption is used to highlight key aspects of the e-dating process.

The production and acquisition of goods and services, their consumption, and the disposal of used goods are part of a cycle of managerial and socioeconomic activities (Arnould, Price, and Zinkhan 2004). The circle includes four key processes: production, acquisition, consumption, and disposal.

**Figure 6.1**

**The Circle of Consumption: A Framework**



Here, examples of each process are illustrated from the findings. In our production stage, consumers and managers (here, e-tailers and e-service managers) often co-produce. For example, informants produce unique e-personal ads or e-cards online with the templates provided by a website. As a part of the acquisition stage, informants acquire information via Internet technology. For example, some informants spend hours finding a specific e-dating site that best suits their interests. E-daters similarly search other e-daters profiles and for profiles with unique key words (e.g., hiking, skiing, art). The next step is actual consumption. Here, the informant uses an e-dating site to contact other e-daters via CMC. In many instances, production and consumption co-exist in the online environment.

The link from consumption to disposal brings up some issues with respect to etiquette and netiquette. Consumers often may wonder how long is appropriate to physically save a Valentine card that they have received. Seinfeld, a television show that often mimics social etiquette issues, portrayed a woman breaking up with a man because she found the Valentine that she gave him in the trash. Now, in the era of CMC, a new set of “netiquette” rules apply and are still being developed and understood as a social script. It is interesting to note that consumers have the ability to save their e-cards in different ways. Some of these require the card recipient to maintain an account, or pay a service fee, to a website. The netiquette of saving e-cards or virtual valentines is an example of an emerging issue. Etiquette and netiquette may moderate some consumer behaviors between the consumption and the disposal stage.

In the disposal stage, the consumers may drop a particular e-dating website and decide not to return for various reasons. For instance, they may believe they are paying too much (on average thirty dollars a month) for the services they are receiving. Or, they may suspect that a particular site is making use of shills. Match.com (with one million paid subscribers and fifteen million members) has been charged with hiring people to date their customers in order to encourage them to continue paying for the service (AFP 2005)<sup>14</sup>. Other informants are concerned that the site uses their personal information in ways that are unrelated to e-dating. However, other informants stop e-dating due to successful reasons (i.e., they found a romantic partner; they built an on-ground social network). However, others stop e-dating because of negative experiences they reported with the site itself or, more commonly, with other e-daters that they interacted with via the site.

### **Market Resistance: Implications for Managers**

This dissertation broadens knowledge about the holiday for various consumer segments and examines what e-dating and the Valentine's Day holiday mean to consumers. In turn, knowledge about these meanings results in implications for communications and marketing managers. Consider tables 4.1 and 4.2, where implications for retailers are presented.

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<sup>14</sup> The lawsuit against match.com was filed in November 2005 by a customer who went on several dates with a woman who allegedly confessed that she was paid to meet him and other e-daters on the verge of ending subscriptions.

Marketing expenditures and e-dating promotional efforts are large on Valentine's Day. Such marketing efforts often make explicit suggestions to assist consumers (e.g., tips on writing a personal ad, suggested gifts and retailers). Although such messages are potentially useful to consumers, implications arise in the area of market resistance. For instance, many informants go out of their way to avoid stereotypical rituals or celebrations suggested by marketing messages. In turn, consumers constantly create new traditions, often by adopting Internet technologies (e.g., e-Valentine's, speed dating). In this way, consumption rituals and communication patterns are constantly evolving.

A key implication for retailers is to recognize market resistance. In addition, retailers may seek ways to overcome consumer resistance. Suggested ways are to incorporate personalization and customization services for both online personal ad spaces and Valentine's Day gifts. Providing personalization options may help alleviate the resistance surrounding mass-retailed intimacy. For example, enabling e-daters to customize their personal ad with html, a theme song, colors, photographs, and fonts may help alleviate some of the resistance and hesitancy of being one of thousands of e-daters with their personal (often intimate) information in cyber-space. On the retail side, incorporating engraving services turns an ordinary mass-retailed watch into a customized gift.

### **Limitations and Directions for Future Research**

Some limitations relate to the challenge of studying consumers in a relatively intimate and personal context. For instance, most informants focused on heterosexual

relationships. One direction for future research is to examine, in detail, other kinds of relationships. Other limitations include relatively small sample sizes and restricted geodemographic focus. For example, children were not directly included in this dissertation. Children are an important group for future study in this area because of their familiarity with the Internet and their influence in purchase decisions.

Another limitation is that this dissertation maintains a U.S. focus. Thus, a promising research direction is to study romantic rituals and technology adoption in other cultures. Interesting research questions here include: *How well does social exchange theory explain gift exchange behavior in other cultures?*, and *What theories are most promising for explaining cross-cultural differences in ritual celebrations and technology adoption?*

Future research should seek to discover how online relationships influence initial offline interests. A promising research question is: *How do the online introduction and rituals influence subsequent on-ground relationships?* In some respects, this issue about the interaction between online and onground behavior is one of the most important research questions for the social sciences in this information age. One of the reasons that there is little scholarly research in this area is because longitudinal data is needed to track online/onground behavior for meaningful insight.

At the beginning of this study, it was assumed that e-daters use e-dating sites as a medium to meet other e-daters in person. That is, CMC is a means to establish FTF communication. However, informants shared their intentions of keeping online exchanges and relationships online. In these cases, FTF communication never existed. Thus, a



second question for further research is: *To what extent do online introductions remain only online relationships?*

A final avenue for future scholarship is methodological. A Netnography is a promising method in order to study how rituals evolve in an online community. Emerging technology provides researchers unique tools for studying romance and rituals. By means of a Netnography, researchers can explore relevant questions such as: *How do dating rituals within e-communities evolve over time?* Consider the popular social networking e-communities (e.g., facebook.com, friendster.com, myspace.com) that include a dating function. These e-communities allow users to join a social network, view the personal space of friends and friends-of-friends. Such sites are also expanding to include career and personal interest networks (e.g., based on geography, politics, sports, advocacy issues, schools). On some sites (e.g., facebook.com), users may print out their own “social network map,” which includes a node for each member of their unique social network, and the paths and linkages to each contact. In the 21<sup>st</sup> century, e-dating may become the norm rather than the exception. Thus, it is important to understand how e-community “netiquette norms” evolve.

Here, the primary focus has been on the Internet. There are other information technologies (IT) that are poised to enhance and influence human behavior. These include cell phones, personal digital assistants (PDAs), and virtual reality. Each contributes to the future of mobile-dating (m-dating) opportunities. The role of new IT tools on dating behavior is an area to explore. Furthermore, virtual reality is an area in which

daters of future generations may rely upon in their quest to meet others and form meaningful relationships. In summary, new IT methods provide links to complete everyday communication exchanges. Thus, there is a challenge in social science research to understand and explain these new behaviors.

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## APPENDICES OF THE DISSERTATION

## APPENDIX 2.1

### E-Dating Legislation

As of August 2005, after completion of this study, there is pending Legislation on identity verification and background checks for e-dating in the following states in the U.S.: MICHIGAN SB 286, FLORIDA HB 1035, FLORIDA SB 1768, TEXAS HB 1307, and CALIFORNIA AB 1681

California AB1681 was defeated on March 22, 2005, and similar pending legislation in VIRGINIA was also defeated in the spring of 2005.

Here is an example of e-dating legislation in the state of Michigan (Michigan State Legislature 2005):

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#### MICHIGAN'S SENATE BILL No. 286

March 3, 2005, Introduced by Senator CROPSEY and referred to the Committee on Judiciary.

A bill to require online dating services to conduct criminal background checks or to provide certain notices; and to provide remedies.

THE PEOPLE OF THE STATE OF MICHIGAN ENACT:

Sec. 1. As used in this act:

(a) "Criminal background check" means a search of a person's felony and sexual offense convictions by 1 of the following means:

(i) Through any criminal history record systems available to the public and maintained by each of the 50 states and the District of Columbia.

(ii) Through a private vendor whose database contains more than 170,000,000 criminal records that are otherwise available to the public, has substantially national coverage, is updated at least once every 90 days, and is operated and maintained in the United States.

(b) "Member" means an individual who is either a member or who submits a profile or other information for the purpose of dating, matrimonial, or social referral services to an online dating service provider.

(c) "Online dating service provider" or "provider" means a person or organization engaged, directly or indirectly, in the business of offering, promoting, or providing access to dating, relationship, compatibility, matrimonial, or social referral services primarily through the internet.

Sec. 2. An online dating service provider that provides services to residents of this state shall do 1 of the following:

(a) Disclose prominently on the provider's home page, not more than 3 inches from the top of the website, that the online dating service provider has not conducted criminal background checks on persons using its service. The disclosure shall state the following:

"WARNING: [NAME OF PROVIDER] HAS NOT CONDUCTED FELONY OR SEXUAL OFFENSE BACKGROUND CHECKS ON ITS MEMBERS."

(b) If the provider conducts criminal background checks as described in section 1(a)(i), display prominently on the provider's home page, not more than 3 inches from the top of the website, a disclosure that states the following:

"WARNING: BASED SOLELY ON THE NAME PROVIDED BY THE MEMBER, [NAME OF PROVIDER] HAS CONDUCTED A CRIMINAL BACKGROUND CHECK THROUGH CRIMINAL HISTORY RECORD SYSTEMS AVAILABLE TO THE PUBLIC AND MAINTAINED BY EACH OF THE 50 STATES AND THE DISTRICT OF COLUMBIA.".

(c) If the provider conducts criminal background checks as described in section 1(a)(ii), display prominently on the provider's home page, not more than 3 inches from the top of the website, a disclosure that states the following:

"WARNING: BASED SOLELY ON THE NAME PROVIDED BY THE MEMBER, [NAME OF PROVIDER] HAS CONDUCTED A CRIMINAL BACKGROUND CHECK THROUGH A PRIVATE VENDOR WHOSE RECORDS MAY NOT INCLUDE ALL CONVICTIONS FROM ALL JURISDICTIONS. CONTACT [NAME OF PROVIDER] FOR INFORMATION REGARDING WHICH JURISDICTIONS ARE INCLUDED."

Sec. 3. (1) Subject to the requirements of this act, an online dating service provider shall establish a policy on what actions the provider will initiate as a result of information obtained through a criminal background check.

(2) A copy of the policy established under subsection (1) shall be made available to each person that applies for membership with the provider.

(3) Before a person is accepted for membership with the provider, the person shall be required to acknowledge that they have had an opportunity to review the policy established under subsection (1).

(4) The provider's home page shall contain a link that will allow a person to review the policy established under subsection (1). An online dating service provider shall update the criminal background check for each member at least once every 90 days.

Sec. 4. (1) A person that violates this act is guilty of a misdemeanor punishable by a fine of \$250.00 for each day that the person is in violation of this act. It is a separate violation under this subsection for each person the provider fails to provide a notice as required under this act.

(2) A civil action may be brought by the attorney general or by a person that suffers damages as a result of a violation of this act. In an action brought under this subsection,

the attorney general or a person may recover actual costs, actual and reasonable attorney fees, and the lesser of the following:

(a) Actual damages.

(b) \$500,000.00.

Sec. 5. A provider does not violate this act as a result of being an intermediary between the sender and recipient in the transmission of a message that violates this act.

Enacting section 1. This act takes effect July 1, 2005.



## APPENDIX 2.2

## Most Visited E-Dating Sites Overall and by Market Niche

**Rankings of Top 15 e-dating Sites (all rankings as of May 2005, based on # of hits)**

1. Yahoo Personals\*
2. Match.com\*
3. eHarmony\*
4. American Singles
5. WebDate
6. Gay.com
7. Friendster\*
8. True
9. Black Planet
10. Perfect Match
11. HotorNot\*
12. MSN Match.com
13. Mate1
14. Adam4Adam
15. Love Access

\*screenshot of homepage included in appendix

**Top Personality Profiling Personals**

1. eHarmony\*
2. True
3. Perfect Match

**Top Religious Personals**

1. JDate\*
2. Christian Mingle
3. Christian Cafe

**Top Social Networks**

1. MySpace
2. Friendster\*

**Top Personals for African-American E-Daters**

1. BlackPlanet\*
2. BlackPeopleMeet
3. BlackSinglesConnection

**Top Personals for Asian E-Daters**

1. VietSingle
2. Shaadi\*
3. Asiafriendfinder\*

## APPENDIX 2.3

Example of E-Dating Online Advertisement and Website: Match.com



Match.com - Find Singles at the World's Largest Online Dating Personals Service - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://www.match.com/home/myhome.aspx

Google Search Web Blocking popups AutoFill Options

match.com My Match | Search | My Profile | Email | Advice: Happen Mag

Sign In Account Settings How Match Works Help Your Privacy

Click here to subscribe to Match.com today!

My Match: Connections | Winks | Email | Favorites | Removed profiles Username Password Sign in

### My Profile

Click here to add your primary photo

Complete your profile!

Create Profile

### My Inbox

Connections **NEW!**

Subscribe now to contact other members!

Wink at someone for FREE to show you're interested!

Favorites (0)

Blocked profiles (0)

Removed Profiles (0)

### Search

Learn more about searches

**One-click searches**

- Mutual matches
- Reverse matches

**Other searches**

- Custom search
- Keyword search
- Username search

**Saved searches**

Search Go

**Quick Search**

I am a Seeking Between ages

Woman Men 25 & 45

located within miles of

Online now ☐ Photos only ☒ **Search now**

FREE! **happen** magazine from match.com

**THE WOMAN'S GUIDE TO GUY-SPEAK**

**WHAT MAKES THIS POSER A POSER?**

- Green rash (fake bling)
- Wack prepaid plan
- Too much hair gel

**BOOYAH!**

This survey brought to you by:

start MSN Hotmail - Mens... Match.com - Find Si... Proposal\_Close822... Windows Explorer Adobe Acrobat Prof... 3:36 PM

## APPENDIX 2.4

## E-Dating Site Example: Yahoo Personals



## APPENDIX 2.5

## E-dating Site Example: eharmony.com

eHarmony - More Marriages per Match than any Online Dating Service - Microsoft Internet Explorer


File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Print Mail News RSS Feeds

Address <http://www.eharmony.com/singles/servlet/homePage> Go Links

Google eharmony Search Web Blocking popups AutoFill Options eharmony

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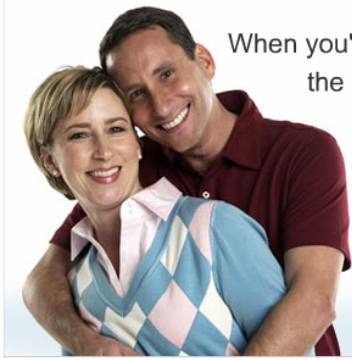


[Met Your Match at eHarmony?](#)  
[Please let us know!](#)

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[WHY EHARMONY WORKS](#) [TAKE OUR TOUR](#) [LOGIN](#)

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When you're ready to find the love of your life

Dawn and Todd:  
Married:  
September 19, 2004

[See more eHarmony couples >](#)

**ALREADY A MEMBER?** [Click here to login >>](#)

**Register to Begin**

First Name:

I'm a:

Postal Code:  Country:

Email: (Confidential)  
*Note: Your email is used to log back in*

Confirm Email:

Password:   
*Must be at least 5 characters*

How did you hear about us?

---

**Join eHarmony today and get your FREE Personality Profile!**

See why eHarmony.com is the fastest growing relationship site on the web. Take the eHarmony Personality Profile and get instant, objective feedback on yourself and how you relate to others. The eHarmony Personality Profile begins the exciting journey toward finding your true love.

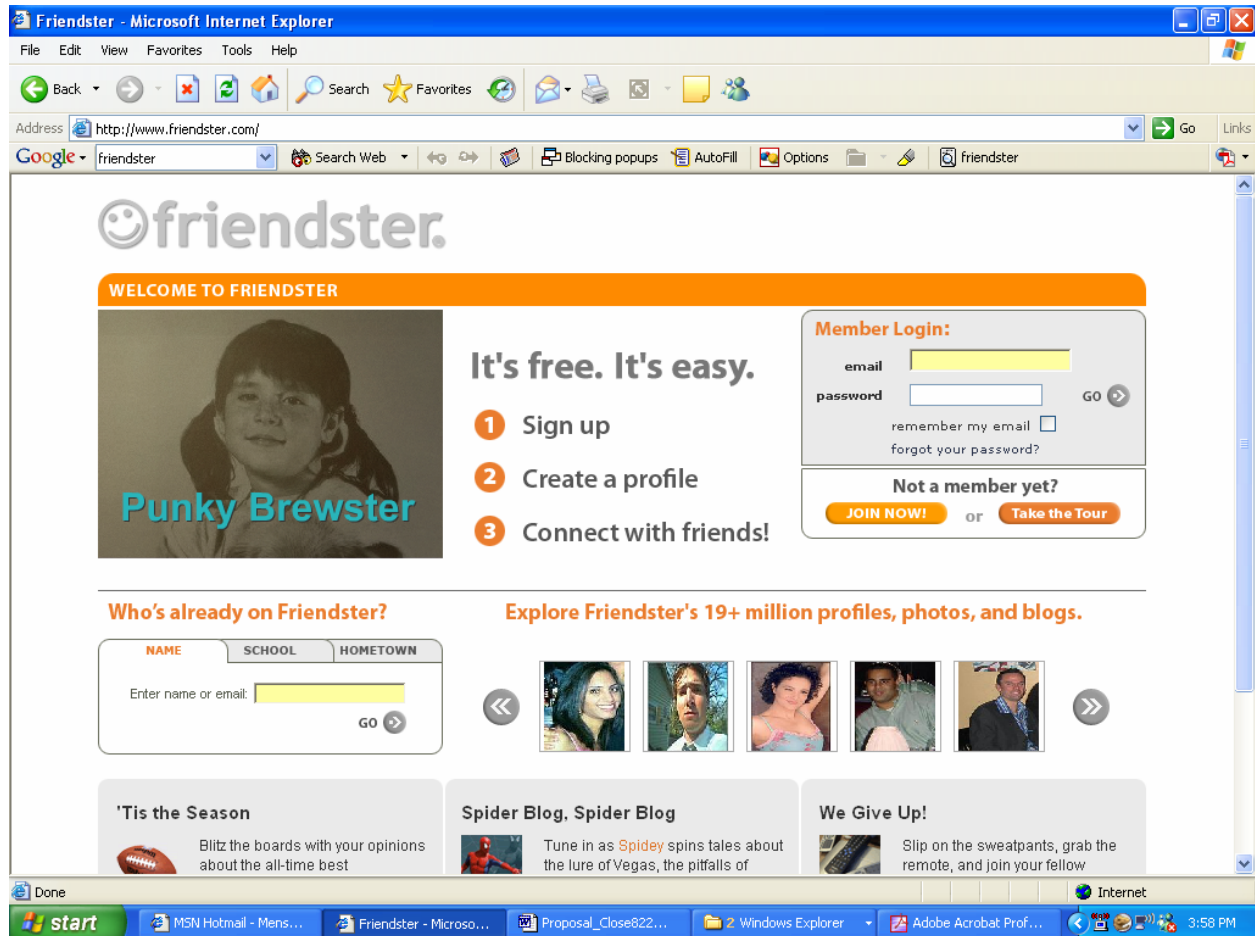
start

MSN Hotmail - Mens... eHarmony -More M... Proposal\_Close822... Windows Explorer Adobe Acrobat Prof... Internet

3:47 PM

## APPENDIX 2.6

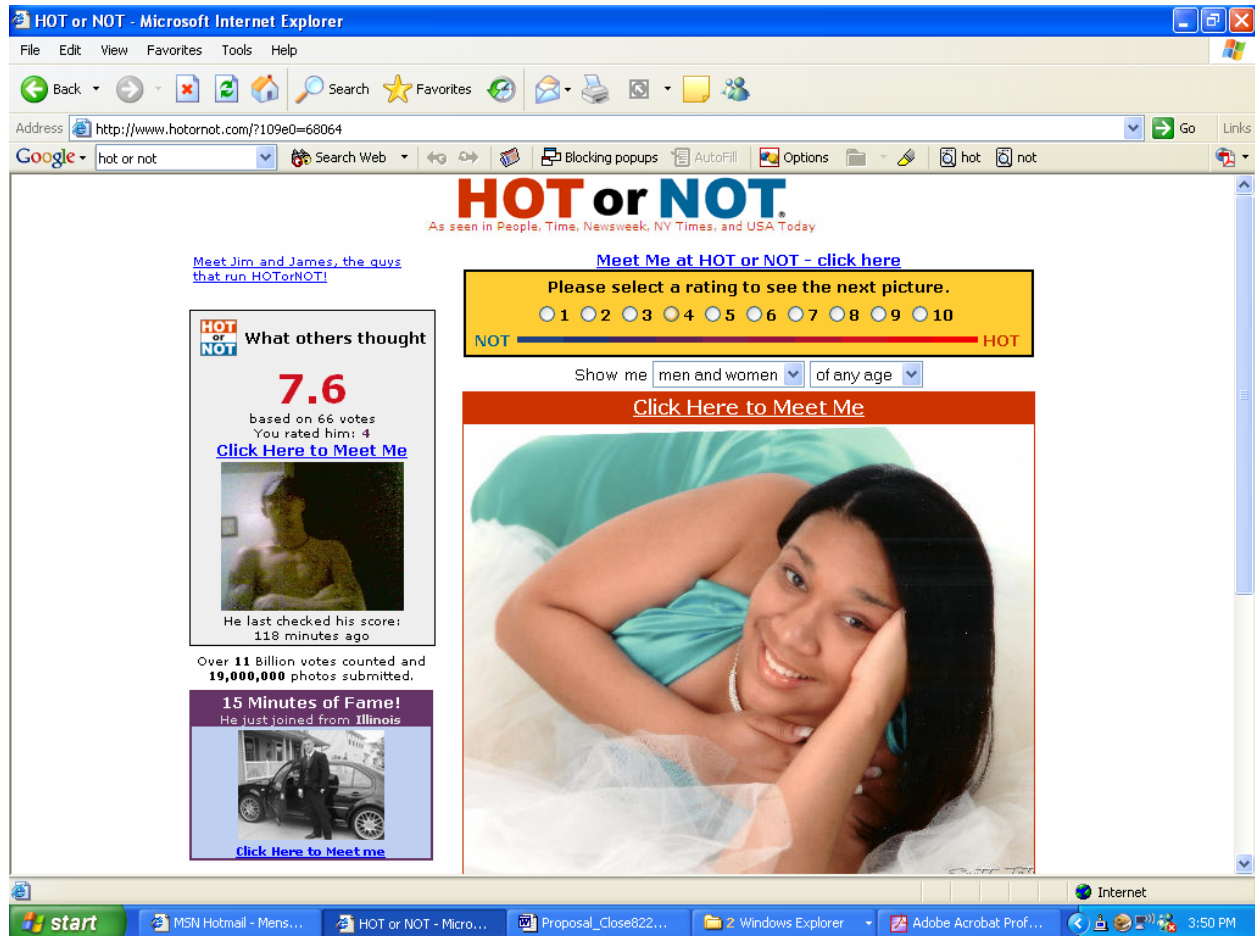
## Example of E-dating Site: Friendster



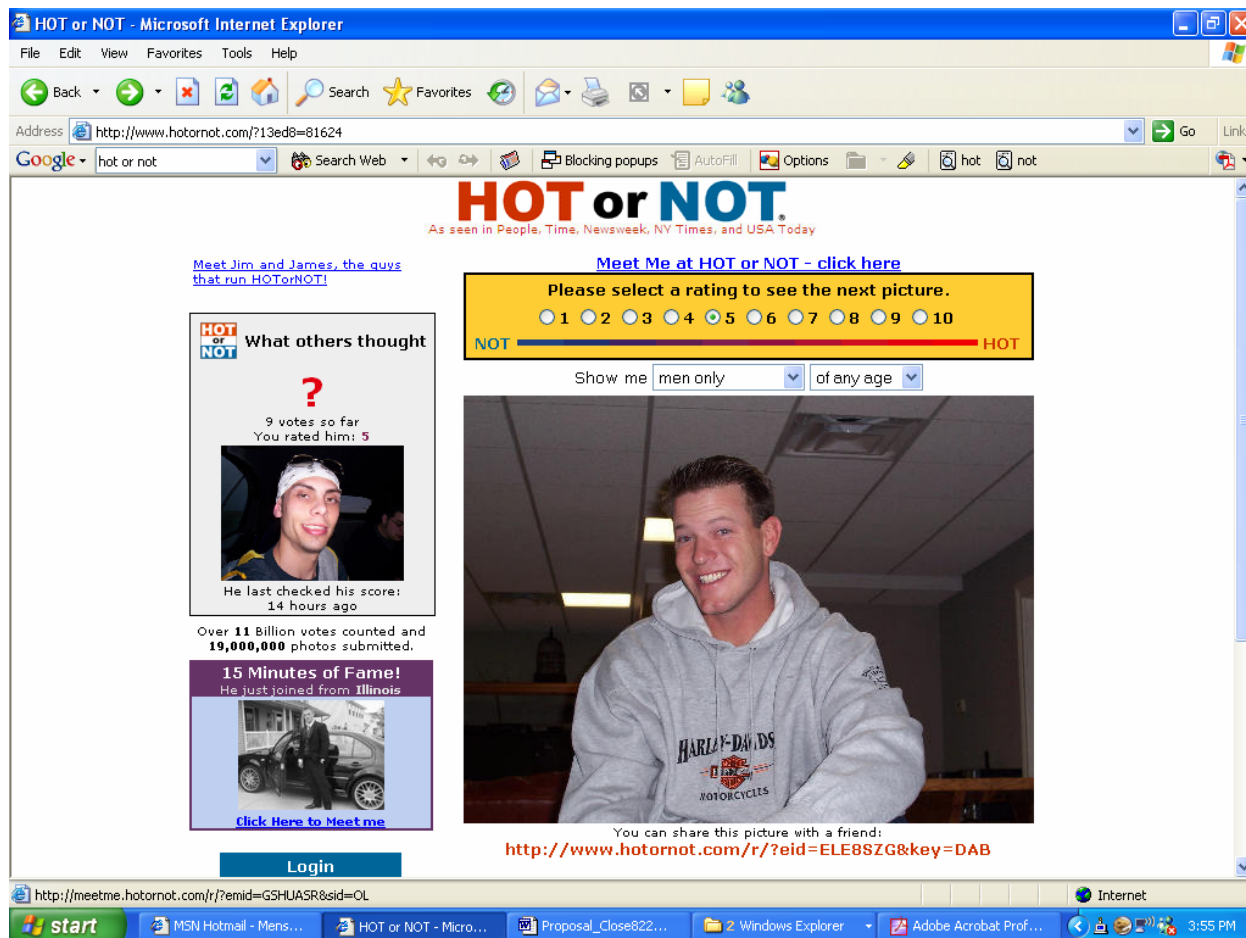


## APPENDIX 2.7

## Example of E-dating Site: Hot or Not (female)



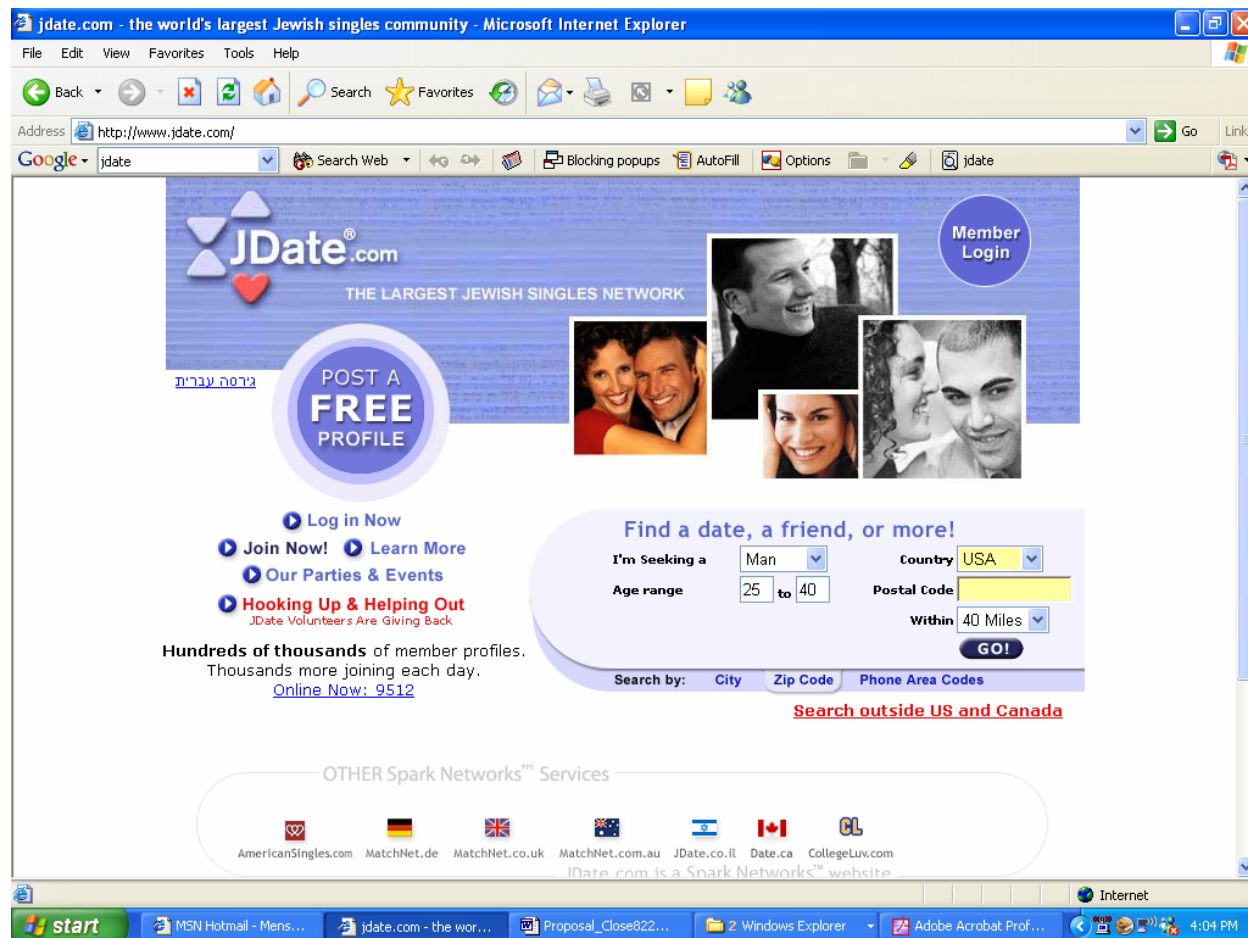
## APPENDIX 2.8

Example of E-dating Site: Hot or Not (male)<sup>15</sup>

<sup>15</sup> Note the instance of naive branding-- the Harley Davidson logo on this e-dater's photo submission.

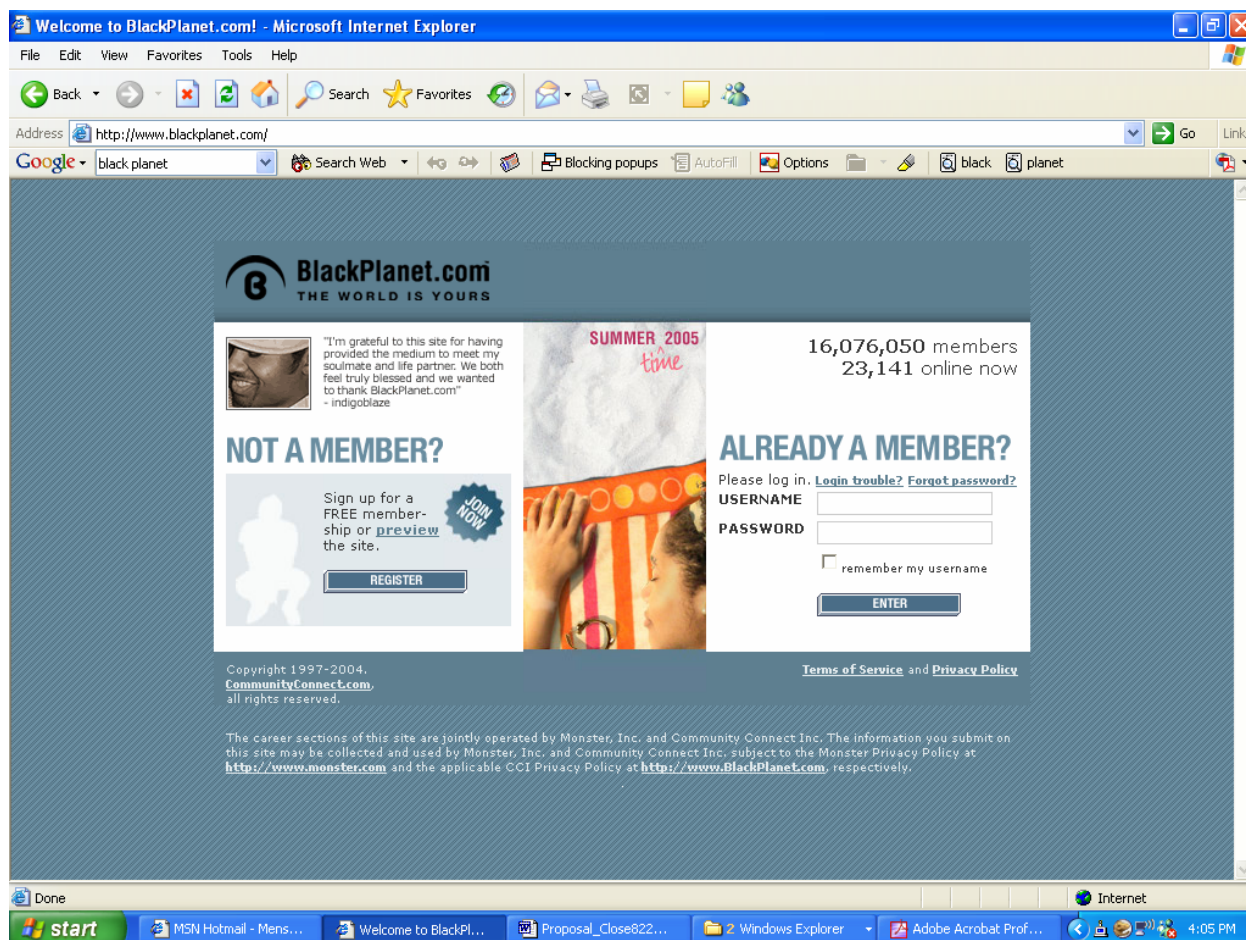
## APPENDIX 2.9

## Example of Religious e-dating Site: JDate



## APPENDIX 2.10

## Example of Ethnic E-Dating Site: Black Planet



## APPENDIX 2.11

## Example of E-Dating Site: Shaadi



## APPENDIX 2.12

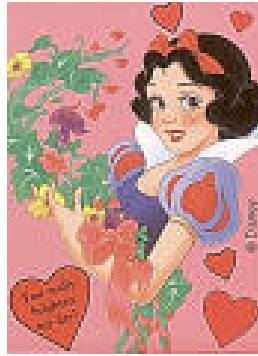
## Example of E-dating Site: Asian Friendfinder



## APPENDIX 3.1

## Sample Valentines








## APPENDIX 4.1

## Example of E-tail in the Context of Romantic Gift Giving



### Find the Perfect Wedding Gift

It's easier than ever to find the perfect wedding gift. With our quick search of nearly two million wedding registries from all the top retailers, we can help you find a couple's registry fast!

Search for a registry now:

First Name

Last Name

Crate and Barrel

Williams-Sonoma

Neiman Marcus

Gump's

Fortunoff

JCPenney

Pier 1 Imports

The Home Depot

Carson Pirie Scott

Bloomingdale's

Macy's

Pottery Barn

Restoration Hardware

REI


Barneys New York


HONEYMOON REGISTRIES

Starwood Hotels & Resorts


Sandals

NON-PROFIT CHARITIES




**Plus, we'll make a donation in the bride and groom's names!**

A blue ribbon beside a registry means that WeddingChannel.com will make a donation to the couple's favorite charity each time a gift is purchased for them through our site.

 Send this to a friend.

