CULTURAL INFLUENCES ON DOING QUALITATIVE RESEARCH IN PUBLIC RELATIONS IN MEXICO

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INTRODUCTION

Over the last decade in international public relations scholarship, there has been a significant growth in comparative research, offering illumination on the different practices, assumptions and expectations of those involved in public relations in both global and local contexts. The qualitative voice is increasingly heard because of its more nuanced insights on cultural difference. Yet there are significant challenges for researchers seeking to investigate public relations in cultures different from their own, one of the most prominent being how to explore and interpret in a culturally sensitive way the lived experiences of those under investigation. This is complicated by the intersection of the data with the researchers' own culture. To date, detailed accounts of the process of undertaking cross-cultural public relations research from an emic perspective are rare. In this paper, we join a long tradition in sociological research (Bell & Newby 1977) whereby we present an in-depth discussion of the process of conducting ethnographically-inspired research into the occupational culture of public relations in a Latin American city. The paper has a methodological focus, our aim being to raise issues concerning the conduct of cross-cultural, public relations research. Specifically, we examine how culture affected our decisions, methods and experiences when collecting data for a study of public relations practitioners in Mexico City.

THE RESEARCH APPROACH

Previous studies which have sought to bring insight into public relations as practised within an international arena are notable for the way in which they draw on Western models or general typologies as a means of assessing public relations practices in non-Western contexts. For example, Sriramesh's body of work tests the validity of Grunig's Excellence theory in a variety of Asian cultures, such as in his recent evaluation of the usefulness of situational theory in Singapore (Sriramesh et al, 2007). Others analyse public relations practices within the framework of Hofstede's universal cultural dimensions (e.g. Cooper-Chen and Tanaka's exploration of Japan's PR industry, 2008). Both approaches offer a means for comparing and contrasting international public relations practices against constructs developed primarily in the

West. Such studies, however, tend to uphold the notion that reality is reflected in the researchers' view of it.

This contrasts with the stance of interpretive researchers who, informed by constructivism, endeavour to surface the meanings and realities that are co-created and conceptualised by those under investigation (Daymon and Holloway 2002). In grounding their findings in the voices of research participants, interpretive researchers seek to identify significant, local issues in naturally occurring settings by using research tools that are relevant, comprehensible and pertinent to their specific cultural context (Tayeb 2001).

With this in mind, we selected to follow the ethnographic tradition, grounding this in the norms of the interpretive/constructivist school. We sought to address the particular rather than the general and to this end were involved in carrying out the type of fieldwork that Wolcott describes as 'intimate, long term acquaintance' (2001, 76) whereby we committed to immersion in the 'field' over an extended period of time in order to 'see' the components of social structure and the processes through which they interact (Rosen, 1991, 12-13).

Ethnographic research techniques usually involve participant observation, as well as non-observational methods such as interviewing and visual and textual analysis. Thus, researchers enter a cultural setting (i.e. the working world of public relations practitioners) and use culture as a heuristic to account for observed patterns of human activity. Researchers aim to develop relationships with those belonging to the culture, in effect, becoming cultural 'insiders', being sensitive to how human beings behave, able to conceptualise the world through the lens of its participants, and, therefore, able to capture something of the interactive process through which public relations and culture are constituted. A strength of ethnographic techniques is their ability to deal with the ambiguity and flux that occurs in social life which other methodologies are forced to conceal or ignore (Machin 2002). We describe more precisely how we did this in Mexico in a later section.

To date, judging by the scarcity of ethnographically oriented studies in the public relations literature, it would appear that few researchers have followed this route to

public relations inquiry. Perhaps this is due to the prolonged period of time that researchers need to devote to conducting their investigations. Yet such research offers the potential for candid, revealing, critical insights (Pauly and Hutchison 2001) concerning, for example, suppressed, minority voices which point to imbalances of power in society. Alternatively, it offers a means to elicit the values that are mirrored in public relations discourses, thus revealing the ideology of the occupation itself.

Following this tradition, our research is informed by the cultural nuances of our focal culture, Mexico. In the next sections, we describe Mexican culture and then discuss how this influenced the decisions we made throughout the process of designing our research and collecting the data.

MEXICAN CULTURAL CHARACTERISTICS

In this section we highlight some of the more widely recognised categories and perceptions of Mexican culture before going on to consider how this understanding informed our research approach.

Simpatia and interpersonal orientation

Latin American cultures have traditionally been considered collectivist, emphasising goals, needs and views of the in-group over those of the individual (Albert, 1996). Mexico is described as having an *interdependent* culture (Markus and Kityama, 1999) where harmony and friendly relationships are emphasised, with the expression and experience of emotions and motives significantly shaped and governed by consideration of the reactions of others. In paying close attention to social interactions, Mexicans are motivated to find a way to fit with relevant others, to fulfil and create obligation (commonly through personal favours) and, in general, to become part of various networks of interpersonal relationships. *Simpatia* is highly valued and a person is deemed to have this characteristic when s/he is 'perceived to be open, warm, interested in others, exhibits positive behaviours towards others, is in tune with the wishes and feelings of others, and is enthusiastic' (Albert 1996, 333). Qualities such as 'understanding and helpfulness' predominate (Albert, 1996) underpinned by the moral obligation to take care of family and friends (Gandy, 1990). Mexican family relations are characterised as 'exceptionally affect laden, with a great

emphasis on life, reflecting strong emotional interdependence' (Diaz-Guerrero and Sazalay, 1991).

For foreign researchers entering Latin America, their credentials hold less weight than interpersonal relationships built on trust. Nevertheless, European researchers are respected in Latin America for their rigorous training and greater access to resources. Qualitative methods and objectives are welcomed because 'understanding is generally more valued than counting' (Jones 2004, 446-7) and therefore there is a greater affinity with the humanities and critical studies orientation of European scholars.

***Palanca* and Social Hierarchy**

Despite paying close heed to the needs, desires and goals of others, the attention of Mexicans is not indiscriminate but highly selective, with a particular focus on relationships with ‘in-group’ (particularly class) members (Marcus and Kityama, 1999). Whom one chooses as companions and associates reflects their standing in society and their quality as an individual. Mexicans often look to associate with people of higher status in order to improve on their station in life. *Palanca* is relied on, referring to power derived from extensive interpersonal connections and networks of relationships which expand into organisational, social and family life (Lindsley and Braithwaite, 2003). However, position in the social hierarchy does not in itself indicate what an individual can accomplish, rather what can be offered in an interdependent relationship (Jones 2004). Therefore, people manage relationships according to the resources available to them, such as information and knowledge, contacts and access to networks.

Foreign researchers start at middle-upper level on the hierarchy where 'good manners, courtesy, intelligence and affinity [are] appreciated. What matters is not displays of wealth but displays of common courtesy and appreciation' (Jones, 2004, 449).

Confianza

Central to the beliefs of Mexicans is the importance of placing trust with great care. The country has experienced deep and longstanding sentiments of *‘desconfianza’* (lack of trust) in the political system and institutions of contemporary capitalism (Pearce, 2004) and cultural tradition has taught Mexicans that one should not trust that

promises will be fulfilled. As a consequence, Mexican culture is often considered to be fatalistic, regarding time as more interpersonally negotiable, as is discussed in the next section, and with relationships prioritised over tasks. Lindsley and Braithwaite (2003) have suggested that building stability through interpersonal linkages that connect people in their familial, social and organisational lives provides the 'social insurance' necessary against the uncertainty in economic and political structures. The view that relationships are more important than the completion of tasks is manifested in a variety of behaviours, including asking questions about colleagues' families, and discussing personal matters before business.

The core foundation of good relationships, therefore, is the notion of *confianza*, i.e. 'the feeling of trust, interpersonal closeness and a commitment to shared effects in the future, based on a similarity of worldview and derived from common experience' (Archer and Fitch, 1994, 86). Trust is built through communicative behaviours that adhere to cultural norms for face saving (Lindsley and Braithwaite, 2003) and the need to guard one's privacy (Bartra, 1992; Albert, 1996). 'For the Mexican to place trust in another, particularly anyone who is not a blood relative, is very significant. Mexicans regard it as a great risk to have faith in another and trust is never granted lightly' (Roy, 2003: 231). This has implications for the foreign qualitative researcher seeking access to individuals and research sites such as work organisations and social centres. Unless a relationship has been built already, either directly or through an intermediary, it is unlikely that effective data collection will occur.

***Flexibilidad frente al incertidumbre* (Dealing with uncertainty: Flexibility)**

Linked to the notion of fatalism is the value that Mexicans put on flexibility, both in behaviour and use of time. What counts as being 'on time' can be mediated by unexpected events beyond one's control. Organisational tasks in the capital, Mexico City, for example, are often slowed by structural processes such as government bureaucracy or infrastructural constraints such as traffic congestion and public transport delays. On the day of a *'manifestacion'* (public protest), the city is thrown into gridlock and it is expected that anyone with an appointment will arrive late, if at all. Jones (2004) observes that Latin Americans 'do not internalise time pressure the way many northern Europeans and North Americans do [and therefore] these frustrations are perceived differently. They are rolled into the process rather than

being confronted as hurdles that must be overcome' (p.451). Roy (2003) argues that, "Mexican nature seems more than merely accepting of the inevitable. Much of Mexican folk wisdom …seem(s) to relish the challenge of finding happiness in the face of adversity" (p. 232). '*La fiesta*' (literally, 'the party') is a form of therapy for reducing the strains and stresses of everyday life.

As a consequence of the Mexican belief that much is out of their control, deadlines are considered arbitrary, and time is measured by the task rather than the clock. To some extent, this is also a reflection of Mexicans' respect for relationships over task. In work and social life, therefore, the generation and implementation of carefully planned work or personal strategies are not common, unlike in Europe or North America; however, creativity is prized. This has implications for foreign researchers used to carrying out investigations according to precise and rigorous research protocols.

In summary, an ethnographic approach is appropriate for our study because little is known about the occupation of public relations from the perspective of those working in it, especially in Mexico, and the emic approach of the ethnographic orientation enables an understanding of this cultural group on its own terms and using its own constructs (Earley and Singh, 1995). Furthermore, this qualitative approach is closely aligned with the characteristics of Mexican culture, that is, it is flexible, able to be adapted to suit changing circumstances, and it pursues a greater understanding of human relationships especially the interpersonal, because it allows researchers "to get up close to the people they are studying and get involved with them" (Daymon and Holloway, 2002, 5). We move now to describe the process of undertaking this research which aimed to explore the occupation of public relations in Mexico City. We draw attention to how cultural influences informed each stage of the research, reflecting on our experiences and involvement, in line with the ethnographic desire for transparency.

DEVELOPING FAMILIARITY WITH THE FIELD

It was primarily through serendipity and indirect access to *palanca* that we were able to enter the field in which research took place, i.e. Mexico City. All primary research was carried out by the second author, a Spanish speaker. Our first interactions with

the cultural life of Mexico occurred when the second author attended an academic conference in Oaxaca, Mexico. Here the local conference organiser offered himself as a guide to the cultural sites of the city, thus sparking in us an enthusiasm for the people and artefacts of Mexico. We decided, therefore, to focus on Mexico for our research into the occupation of public relations. From the start, as well as throughout the investigation, interpersonal networks played a major role in providing us with access to our site of study. Indirect contacts led to the second author being offered both work and accommodation: a one year appointment as a communication advisor and coordinator in Mexico City, and accommodation, first, with a family in Mexico City, and later with other young practitioners also working within marketing, communications and international relations. Our involvement as ethnographers was therefore in both work and social contexts.

Prior to arriving in Mexico, we had established that the research design would involve two primary stages consisting of interviewing and observing. However, once in the field, opportunity together with the need to be adaptable to both research demands and Mexican cultural characteristics led to our research taking on the form of three interactive stages consisting of ongoing ‘dislocated’ participant observation, ongoing in-depth interviews, and follow-up, explanatory observations coupled with document analysis. These stages are described next.

COLLECTING THE DATA

Observations. Living and working with locals provided the opportunity to gain a greater understanding of Mexican life, and to investigate public relations by taking on the role of a 'dislocated participant observer' (Banerjee and Linstead 2004). It is from such a position that creative insights often emerge in research (Lofland 1971). Being 'familiar' with the research area (because of the second author's previous experience as a public relations practitioner herself) enabled her to share an insider's interpretations of particular patterns of experience, principally those relating to the practice and occupation of public relations. At the same time, she was also a 'stranger' (from another country) which enabled her to gain enough distance from the phenomena to be able to interpret the rules and norms that are socially constructed in Mexico in a way that, hopefully, is comprehensible to culturally different others, i.e. many of the readers of this article.

The purpose of the observation technique was to appreciate the wider and more general contexts in which public relations operates, including the lifeworlds of practitioners. This meant familiarising ourselves with the Mexican culture, how Mexicans view life, and how they behave at work and socially. To this end, observations were carried out within the second author's workplace (the British Embassy in Mexico City), and at a range of both large and intimate social events. Further shorter periods of observation were undertaken within two consultancies and two in-house departments. A period of intensive observation also took place at a 4-day conference of public relations professionals organised in Guadalajara by the RELAPO (The Association of Public Relations Practitioners of the West Coast).

Work at the British Embassy in Mexico City was conducted primarily in English; nevertheless, public relations activities, primarily media relations, were carried out by local Mexicans, mostly working in Spanish. The second author had first-hand experience of coordinating embassy receptions, meetings and visits which required tailoring quintessentially 'British' events to the cultural expectations of the Mexican guests. She also prepared briefings, observed one-to-one media interviews and acted as a representative for the Embassy at some regional press events. Due to the obvious British influence in the day to day working environment of the Embassy, observations here did not form a core part of the research but were useful for comparisons with how work was conducted at the other sites of observation, i.e. consultancies and in-house departments. Furthermore, as a locally engaged employee, the second author was regarded by the majority of Mexican colleagues as 'one of them' and this led to friendships, invitations and access to professional networks. Informal conversations that took place in both the working and social environment were rich in personal narratives. For example, nearing the end of writing up our research, a Mexican practitioner who subsequently became a friend through involvement with the project, hosted an informal dinner party at her house for a group of her public relations colleagues. The purpose of this 'get-together' was to provide an opportunity to informally discuss the key findings that had emerged from our study within the context of their particular day-to-day experiences. These anecdotes, together with our daily readings of the Mexican press and other textual and everyday observations, offered further insights into both occupational and societal cultures.

Fieldwork diary. Throughout the investigation in Mexico, the second author kept a fieldwork journal to record her thoughts, emotions and reactions to the experience, as well as to note any emerging themes, interpretations and consciousness of her biases. An emergent theme recorded in diary notes was '*Relaciones humanas',* which referred to the human dimension of practice and the significance of social, or interpersonal, intelligence. We observed this phenomenon in a variety of contexts including during interviews, and in work and social settings, whereby practitioners placed great value on developing trust and reciprocity in all their dealings. For them, the ideal public relations practitioner was defined as an individual with cultural and social awareness, adaptability, honesty, and the ability to act as a bridge between organisations and their publics. A further theme related to how public relations practitioners are perceived in Mexican society, that is, as *'el ejecutivo con la mano fria'*: someone whose hand has frozen into the shape of holding a glass as a result of attending so many parties.

Interviews and sampling. We noted earlier that in Mexico there is a greater affinity with qualitative research than quantitative, and interviewing in particular seems to align well with Mexican cultural characteristics. Bingham and Moore (1959) have pointed out that semi-structured interviews, as 'conversations with a purpose', enable conversational partnerships to be developed; this correlates with the Mexican desire to build closer proximity with relevant others. We selected this method also because of its ability to enable us to probe and clarify, and to allow interviewees to articulate the topics and experiences of interest to them rather than those we would have prioritised from our own European lens. Such collaborative qualities of the interview method align with the Mexican cultural characteristics of *simpatia* and flexibility, thus aiding the building of trust on which close interpersonal relationships are founded.

In all, we interviewed a total of 33 public relations practitioners, all native Mexicans. Our list of interviewees stemmed originally from the contacts of the head of the Mexican Academy of Public Relations, and then extended onwards to their contacts. It could be argued, therefore, that our research offers only a partial view of public relations in Mexico, i.e. from the perspective of an elite group. However, some public relations researchers (Moreno and Molleda, 2006; Bardhan, 2003) claim that interviewing 'elites' within the profession offers the advantage that they have a more critical vision of the work and role of the researcher, have more experience and

mobility within an organisation and are more willing to assist with the goals of the research. In this study, however, because it was important to consider as wide a variety of experiences as possible, we ensured that our sample included a variety of ages, expertise in consultancies or in-house, different sectors of public relations, both men and women, and a range of levels of role (i.e. from young executives to more experienced managers) (See Table 1). We chose individuals based on the opportunity that emerged to carry out the interview in the first place (Miles and Huberman 1994) as well as participants who were willing to be involved in the project.

Although our sample size for interviews is relatively small, formal interviews were supplemented with informal conversations which took place at professional social events.
Therefore, we interacted informally with a much larger number of public relations practitioners.

Prior to arriving in Mexico, we had developed interview questions based on our readings about Mexico as a society, public relations as a practice, and occupational culture as a generic concept. However, in line with the principles of qualitative research, we adapted our questions to encompass the themes emerging from our observations and early interviews. For example, the research was carried out during the term of the newly elected government after more than 70 years of one party rule. Several of the participants were keen to situate their professional experiences within the wider socio-political context, noting the contribution of their profession to the emerging democracy. They saw the role of the authentic practitioner as one involved in promoting dialogue and more equitable relationships in all aspects of their occupational lifeworld. Our interviews, therefore, pursued themes such as the perceived relationship between the transition to democracy and the role of public relations in promoting transparency, access to information and a sense of trust in political institutions and those of contemporary capitalism. The interviews thus became ‘active’ (Holsten and Gubrium, 1995) and narrative in nature as research progressed. Not only did they enable us to explore the dimensions and facets of practitioner lifeworlds at the centre of the occupational culture, but also aspects of national culture. A person’s life is rooted in the wider community and by

encouraging participants to share elements of their working life histories, details of each practitioner's life were revealed as well as how these intersected with occupational and national cultures (Spradley, 1979; Nixon, 2003).

Mastery of the language spoken in the field of study not only provides a crucial means of building rapport and trust with participants but also influences the ways in which researchers collect data, address issues and interpret phenomena (Marschan-Piekkari and Reis 2004, Usunier 1998). That the second author speaks fluent Spanish enabled her to capture various concepts and associations that, as social constructions, are particular to Spanish-speaking contexts. However, her familiarity with '*castellano*', the Spanish spoken in Spain, did not always extend to many of the '*dichos*', the colloquial expressions used on a daily basis in Mexico City. These are specific to Mexican culture, in some cases specific to particular regions of the country, extending back into early European and pre-Colombian Native American civilizations (Roy 2003). To gain clarification and ensure accuracy, the second author asked questions about expressions and emerging themes to participants, especially those with whom she had formed friendship bonds. Each interview was transcribed in Spanish and the data was also analysed from the original Spanish, with English translation not occurring until a later stage of writing up. Following the first diary entry and practitioner interview, transcription and data analysis began, continuing in a cyclical fashion with ongoing interviewing, observing and reading of the literature.

Document Analysis. Analysis of media such as newspapers and magazines together with professional documents helped us to understand how the news was reported, and also the wider picture such as the intersection of politics, society, public relations and every day life in Mexico. It was also important to explore how public relations and related disciplines were portrayed in the media. The society pages of newspapers, for example, were significant. Publications produced by the professional associations were also reviewed.

During our collection of the primary data, we sought to be *simpatica* and build *confianza* with all our research participants. That participants were often more concerned to spend time in building a communicative relationship with us than getting

work tasks done worked to our advantage as, once in the middle of an interview, participants regularly waived aside job-related imperatives in order to facilitate our data collection. On the other hand, the arbitrary nature of time in Mexico also disadvantaged us in that it was difficult to plan ahead and thus our original timetable for completion of research had to be extended. We used the *palanca* of others to aid our access but also employed that which we ourselves were perceived to hold as European scholars, in order to gain acceptance of the aims of our research project and therefore participation.

REFLECTING ON THE ETHICAL CHALLENGES

Through this discussion, we have endeavoured to illuminate how research conducted within an ethnographic orientation is not an activity that is wholly objective but is instead social, carried out by researchers intimately involved in exploring and building relationships in their field of study. Such relationships are informed by and interact with the culture of the research site as well as that of the researchers. In our case, the selections we made concerning research methods and procedures shifted as we engaged more deeply with Mexican culture, becoming more accommodating of its cultural features as well as adapting to the dilemmas and tensions inherent in building cross-cultural relations. Our choices, therefore, arose from creative discovery as much as research design (Holsten and Gubrium 1995), and thus were relevant to the research focus as well as its locale (Tayeb 2001).

When research is viewed as relationship based, it follows that the data are a cooperative product between researchers and participants, because both are engaged in co-constructing a world (Davies 2008). In this case, that world concerned understandings about the production of knowledge of the occupation of public relations in Mexico City. To some extent, then, this article describes a study of us as researchers in our own relationships with Mexican public relations practitioners. It is necessary, then, to reflect briefly on some of the key ethical dilemmas.

The nature of our study was inductive and therefore it was not possible to fully inform participants in advance about the particular areas we intended to study, as that became clear only with the progression of our research. To what extent then could our activities be described as unethical, especially within a Mexican context, where our

intentions towards participants' involvement could not always be articulated clearly? If privacy is highly regarded in Mexico, and trust rarely granted lightly, then might not those we interviewed, observed and with whom we socialised have had valid reasons for accusing us of exploiting their goodwill and *confianza*? This is a dilemma faced by all interpretive researchers because their investigations involve a process of discovery where the theoretical focus can never be fully known at the beginning, and where it is not uncommon for research objectives to change as new insights are gleaned. That Mexicans believe that life is uncertain and much is out of their control enabled those who agreed to take part in our project to willingly embrace the wider focus of our research - to explore 'the Mexican experience of public relations' - without the desire to be continually updated on the fine-grained details, even when offered.

Much of our early access to Mexican social networks was through intermediaries, a common practice in researching institutional settings. However, the perceptions of those without power concerning their relationship with privileged others, such as gatekeepers, can bias a study and cause its results to be invalidated. Certainly, in Mexico the social hierarchy plays an important role in enabling the acquisition of resources and therefore it is not unusual to achieve acceptance into friendship groups or business networks through loose association with those holding *palanca* or personal influence. In some cultures, an initial introduction by the president of a national professional association (as in our study) could be interpreted as a subtle form of coercion in which practitioners felt obliged to present us with a rosy view of their occupation. In Mexico, however, the informality of the introductions did not confer status but instead enabled us to further many of these contacts into meaningful, discrete relationships where, over time, we were able to access what we believe to have been genuine opinions. Similarly, where managers eased our entry into work organisations, we relied on the notion of interviews as a cultural activity to overcome any hint of being tainted by managerial imperatives. We did this by tacitly associating the interview with the Mexican trait of *simpatia,* thus treating our interviewees as conversational partners (Bingham and Young 1959).

In conclusion, our discussion of collecting data in Mexico City points to the central importance of the cultural context for public relations research. The cultures that

characterise research sites impinge upon selectivity at each stage of the investigation. Public relations scholars need to be accommodating of these when making decisions about research design, methods and procedures. Culture also influences relationships between researchers and participants as they interact to co-construct meaning concerning the topic under examination. The complexity of such interactions is amplified through culture's further affect on researchers themselves who are usually changed to some extent through processes of cultural assimilation, no matter how tepid, when spending extended periods in the field as cultural insiders. Having ourselves become more attuned through this project to the notion that public relations research is a subjective activity carried out by researchers who are inherently enmeshed within the cultural realm, we would argue that future research would be enriched if scholars were to gaze more reflexively upon the cultural influences that affect how they conduct research.

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