

A Qualitative Inquiry into the formation of Generational Cohorts: a Case of an Emerging Market

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Abstract

This study use sociological theories of generations to identify generational cohorts for market segmentation. These theories are predominantly used in the West, hence little is known about their relevance in emerging markets, such as Malaysia. Past studies have mostly borrowed cohort labels from that of the U.S. sources, and assumed that their characteristics can be construed in the Malaysian context. Given the exploratory nature of the study, a qualitative approach by means of personal interview was conducted to identify the actual cohorts in Sarawak, a state in Malaysia. Specifically, major societal and historical events that Sarawakians could overtly recall due to their attachment to them during formative years were elicited. Accordingly forty-eight interviews were recorded, transcribed and content-analysed. Five cohorts were identified, and they were different from that of the U.S. sources. They were subsequently labelled as Neoteric-inheritors, Prospective-pursuers, Social-strivers, Idealistic-strugglers and Battling-lifers based on their collective experience of the events. The results

show the relevance of theories of generations for market segmentation in emerging market.

Keywords: sociology, marketing, generational cohort, qualitative.

Introduction

The sociological concept concerning generation and its impact on society has long been discussed in various disciplines, especially in the West (Dwyer, 2009; Glenn, 2005). Specifically, generation study has increasingly gained its relevance in marketing due to its profound implication on consumer behaviour (Schewe and Meredith, 2004). Studies have shown positive prospects of generational cohort in developing marketing strategies and in understanding consumers (Moore and Carpenter, 2008; Motta and Schewe, 2008). Generation descriptions such as Leading-edge Boomers, Trailing-edge Boomers, Generations X and Y are time and again associated with marketing opportunities and market segmentation (Noble and Schewe, 2003; Schewe and Noble, 2000). Despite originating from sociology, understanding generation has become an innovative basis for marketers and managers alike to communicate with and serve consumers effectively (Mittal *et al.*, 2008). As generation is a lifelong process, it makes the understanding of their characteristics and the prediction of their future behaviour more credible (Holbrook and Schindler, 1994).

Literature review

Definition of Generational Cohort

Generational cohort is defined as a group of individuals who are born during the same time period and who experience similar societal and historical events during their late adolescent and early adulthood years (Rogler, 2002). As such it goes beyond what age alone can divulge because it explores the life journey of individuals through their coming-of-age years (Motta and Schewe, 2008; Smola and Sutton, 2002). They experience the same external events at about the same point in their human development (Edmunds and Turner, 2005), be it political, economic, social or technological event (Noble and Schewe, 2003). Due to its cataclysmic impact on people, individuals in the same generational cohorts tend to think and act differently from those born in other time spans (Gursoy *et al.*, 2008).

Theoretical background

Introduced in sociological theory in the 1950s by Karl Mannheim, sociologists have long used generations to explain its impact on American culture (Eyerman and Turner, 1998). Mannheim's (1952) essay "The Problem of Generations", being one of the earliest works on the subject, pointed out that the youths are susceptible to socio-historical environment (Bengtson *et al.*, 1974). He claimed that those most influenced by external events would have personally experienced them when they came of age, and thus remembered them undyingly. As these events have primacy, they give birth to, and thus define new generational cohorts (Noble and Schewe, 2003).

The theory of intergenerational value change developed by Inglehart (1977, 1997) also maintains that major historical happenings bring about changes on the foundation of existing social orders and value systems of the society, and consequently produce people of the new generations. The theory of historical generations proposed by Rogler (2002) further expands the preceding work and emphasizes that major external events imprint a stronger and more enduring mark on the formative group than on other age-groups who live through the same period. His propositions maintain that generations start with cataclysmic events and reactions to these events which will consolidate into stable orientations if their influences, directed towards to the young adults. The lifelong persistence of these orientations therefore defines historical generations. While birth years may be useful to separate cohorts, formative years explain why one cohort differs from others. These propositions are well supported by generational studies done in the Netherlands (Ester *et al.*, 2000), England, Germany and Japan (Schuman *et al.*, 1998; Scott and Zac, 1993), Brazil (Rubens and Motta, 2005), and the U.S (Holbrook and Schindler, 1994).

Contextual Background

One of the well-known frameworks pertaining to generational cohorts is that of Strauss and Howe (1991). It is widely adopted because the U.S. has long been identified as a benchmark to developing and modernization process (Barnet and Cavanaugh, 1994). They also emphasize that each cohort exhibits distinct attitudes and behaviours which are shaped by the impactful events experienced during their lives. Although different researchers have given dissimilar labels and cut-off points to each cohort in the U.S., there is a general consensus around

them (Dwyer, 2009). A summation of the cohorts is shown in table no. 1.

Table no.1: A Summation of Generational Cohorts in the U.S.

<i>Cohort (Also referred to as)</i>	<i>Birth Years</i>	<i>Defining Events</i>	<i>Brief Description of Characteristics</i>
Veteran (Silent, Traditionalists, Depression Babies)	1925 - 1945	Great depression, Lindbergh, FDR, Second World War	Dedication, hard work, respect for authority
Baby Boomers (Leading-edge and Trailing-edge Boomers)	1946 - 1965	Civil rights, assassination of JFK, women movement, cold war, Vietnam war	Optimism, personal gratification and growth
Generation X (The Thirteenth, Baby Bust Gen)	1966 - 1979	New feminism, spread of AIDS, the <i>Challenger</i> incident, energy crisis	Diversity, informality, techno-literacy, fun
Generation Y (Nexters, Millennials, Baby Boom Echo)	1980 - 2004	School violence, celebrity scandals, terrorist acts (e.g. 911), computer, Internet	Civic duty, social-caused, confidence, optimism, achievement

Source: Dwyer, 2009; Schewe and Meredith, 2004; Zemke, *et al.*, 2000

With the aforementioned in mind, it is posited that the postulation about the segregation and duration of years for defining the generational cohorts in the U.S., being applicable in other settings, such as Malaysia, is unfounded. In fact, past studies have already indicated the limitation of their respective findings when segregating the cohorts in Malaysia based on the U.S. labels and cut-off ages (de Run *et al.*, 2006; Munusamy *et al.* 2010; Ting and de Run, 2012). Inglehart (1997) has long highlighted the deficiency in cross-cultural studies when they use common age-groups or median year of birth as proxies for generation rather than the socio-historical events that more accurately define a country's generational cohorts.

Propositions

Despite being just a state in Malaysia, Sarawak is as large in size and as diverse in its people as Peninsular Malaysia (Department of Statistics, 2011). The state has had a long and different historical background, and is emerging as a lucrative market and investment hub. Hence, the people in Sarawak must have experienced different major societal and historical events from the people in Peninsular Malaysia

and more than that of the people in the U.S. Accordingly, three propositions are formulated in this study. The first proposition is developed as follows:

Proposition I: The people in Sarawak will recall different major societal and historical events from the people in the U.S.

Secondly, since major societal and historical events can happen at any time, and have happened throughout the years in the past, people with different age should have experienced, and thus be able to recall different events that are deemed impactful to them. Hence, the second proposition is as follows:

Proposition II: Each age-group in Sarawak will recall particular and different major societal and historical events that are deemed impactful to them.

Thirdly, individuals having collective memories and experiences of the major societal and historical events are likely to have experienced them primarily during their late adolescent and early adulthood years. Due to the impact of the events, they should be able to explain vividly how they are affected by the events in a subjective manner. This exemplifies the identifying of generational cohorts. Hence the third proposition is as follows:

Proposition III: The collective memories and experiences of the major societal and historical events in Sarawak will show that these events were predominantly taking place during the late adolescent and early adulthood years, hence defining each generational cohort.

Methodology

Research design

A qualitative approach was adopted in this study to explore and understand complex psychological and social issues embedded in generations of people (Marshall, 1996). The goal is to obtain insights into particular social processes and practices that exist and develop within a specific location and context (Connell, 1998). The concept of saturation or information-richness is therefore emphasized (Strauss & Corbin, 1990; 1998).

Population and Sample

Given the exploratory nature in the study, the research site of the study is delimited to a state in Sarawak. Hence, Sarawakians, who are born and spend most of their years in the state, constitute the population

of the study. Gender, race and area of residence were also taken into consideration to ensure the study reflects the demographic characteristics of the state.

There are no clear guides as to how many cases or respondents should be included in qualitative studies (Perry, 1998). Therefore past studies were used as a guide to secure replication of information (Charmaz, 2006). It has been claimed that two to a maximum of fifteen cases are suggested for qualitative studies (Miles & Huberman, 1994). Moreover, qualitative samples often lie under fifty (Ritchie *et al.*, 2003)

Purposive sampling strategy was used to select people purposefully from every age-group (Onwuegbuzie & Leech, 2007). Age was used as a proxy variable to develop cases. Earlier literature has shown that people become susceptible to major events as early as 14 or 15, and formative years tend to take place in late adolescence and end at the age of 24 to 27 (Holbrook & Schindler, 1994; Noble & Schewe, 2003). Subsequently six cases were developed: 15-24 years old, 25-34, 35-44, 45-54, 55-64, and 65 and above. When taking race and areas of residence in Sarawak into account, a minimum of five respondents were required for each case; hence, thirty respondents were predetermined.

Research Instrument

Since the study is about real people in natural settings (Marshall, 1996), personal interview was chosen as the most preferred and effective methods to collect primary data (Kendall, 2008). An interview protocol was designed, and funnel approach was adopted (Churchill & Iacobucci, 2005). Hence, respondents were firstly asked about the major events that they could remember in the last 80 years in an open-ended manner. Auxiliary words such as political, economic and technological aspects to the events were used in probing questions (Noble & Schewe, 2003). Then they were asked to clarify when these events happened and why they were impactful to them.

In addition to the researchers, four interviewers were recruited and trained with interviewing techniques. A pre-test was carried out to check whether the questions were clear enough for respondents to respond. Therefore, interviewers were asked to perform a trial interview each. They were also asked to report the interviewing process to the researchers. As a result, revisions were made until agreement from both the researchers and interviewers came to fruition.

Data Collection

Fifty-three interviews were subsequently conducted throughout Sarawak in December 2012 and January 2013. However, five of them were discarded due to response error. The additional interviews are useful in ensuring information-richness or replication. Although the using of audio recorder is rarely advisable during interviews in Asia (Dick, 1990), it was necessary in this study for checking and analytical purposes. Anonymity, confidentiality, and the purpose of the interview were explained upfront to reduce issues related to method variance.

Data Analysis

Content analysis was used due to its usefulness in analyzing interview data (Kassarjian, 1977). It is widely used to evaluate various communication forms on human behaviour (Yale & Gilly, 1988). It includes frequency counts (Wilkinson, 2000), and allows for qualitative analyses of initially qualitative data (Ryan & Bernard, 2000). It gives room to check whether the content captures something important in relation to the research aim (Clarke & Kitzinger, 2004).

All recorded interviews were transcribed verbatim, and the transcriptions were checked to match against the audio records (Kurasaki, 2000). The analysis began with the annotation of events by the researchers. Disagreements in annotation of texts were resolved by discussing key terms and jointly reviewing the transcripts until a consensus was reached (Kolbe & Burnett, 1991). Once this was done, another two trained coders were asked to analyze all transcripts independently (Hruschka, *et al.*, 2004). Annotation lists between the researchers and the coders were then compared so that they could be coded into distinctive and concise themes. The researchers analyzed all the transcripts again based on the coded themes to provide reliability check (Yale & Gilly, 1988). The themes of responses then allowed the events and their respective years of occurrence to be structured by age in a way that pointed out the cut-off age between cohorts. They were also used to show whether the events fit the model of adolescence and early adulthood as the primary source of memories.

Findings

Objectivity and Reliability

Objectivity and reliability are fundamental components of content analysis to secure quality of the coding process of complex and

open-ended data (Hagelin, 1999). Aside stringent data collection and analysis procedures, inter-coder reliability was used to gauge coders' marking behaviour on nominal data (Bernard, 1995; Kurasaki, 2000). Joint probability of agreement instead of Cohen's kappa coefficient was used because verifying whether coders were agreeing more often than those who were merely guessing is a minor concern in this study (Uebersax, 1987). As a result, the reported overall agreement was about 85 percent, which satisfied the recommended reliability threshold of 80 percent (Cicchetti, 1994; Hruschka *et al.*, 2004). Notwithstanding minor discrepancies, corresponding modifications of the themes were finalized by the team collectively.

Respondent profile

Table 2 depicts a summation of demographic information of forty-eight respondents. Age was used as proxy variable to establish groups to ensure Sarawakians of different ages were adequately sampled for analysis. Racial groups were also taken into account because Sarawak is a multi-racial state, where the Iban, Chinese and Malay make up about eighty percent of the total population.

Table 2: Respondent Demographic Information

<i>Factors</i>	<i>Items</i>	<i>Frequency</i>	<i>Percent</i>
Age-groups	From 15 to 24	10	20.8
	From 25 to 34	9	18.7
	From 35 to 44	9	18.7
	From 45 to 54	7	14.6
	From 55 to 64	7	14.6
	From 65 to above	7	14.6
Race	Iban	15	31.2
	Chinese	14	29.2
	Malay	12	25.0
	Others	7	14.6
Gender	Male	24	50.0
	Female	24	50.0
Present Residence	Kuching city	15	31.2
	Miri city	8	16.7
	Bintulu	6	12.5
	Sibu	6	12.5
	Others	13	27.1

Findings using Content Analysis

Sixty-two major events were elicited and coded from the transcripts by means of content analysis and inter-coder agreement. Frequency count is first used to postulate collective memories about events (Schuman & Scott, 1989). Then reasons given to each major event are looked into to gain insights about the attachment of the respondents to the events. Moreover, given the distribution of age, it becomes apparent that memories of particular impactful events, such as Japanese occupation, communist movement, economic crisis in late 90s and the advent of internet vary with age collectively. This allows researchers to check if the major events which the respondents are personally attached to mainly happened during late adolescent and early adulthood years. Such analysis will then be used to determine the number of generational cohorts and their respective cut-off age.

As a result, five generational cohorts are identified. The first cohort, consisting of those who are aged 20 and below, is labelled as 'Neoteric-inheritors' because they are young and tend to accept whatever there is around them without subjective experience. Besides they are still in their formative years. They seem to know about them without evident impression and conviction. When asked about the events that have impacted her, a young Malay girl responded with a few events disjointedly, and even mistakenly:

"(On the earthquake and tsunami in Aceh) I remember... the event of tsunami, in year 2007... eh... 2006, near Aceh... 2006 if I am not mistaken... Many died, very sad"

"(On 911) I just read the newspaper yesterday... in America right? The building was knocked down by helicopters... three thousand died." (Interviewee 04, Malay, age 16 years, from Miri)

The second cohort, consisting of those who are in their 20s and early 30s, is labelled as 'Prospective-pursuers' because they have experienced the rapid advancement in technology and the recovery from economic crisis. Concurrently they realize the frailty of mankind when natural disasters and deadly diseases strike, thus hoping for the best for themselves, and what lies ahead. Their interest in political matters expresses the belief in securing promising future. Some of the responses are stated as follows:

"(On the earthquakes and tsunamis in Aceh and Japan) Although everyone says Malaysia is a safe place, there is no

tsunami, earthquake and volcano... though the earthquake happened in Indonesia, the tsunami might still reach Malaysia.”

(Interviewee 11, Chinese, age 23 years, from Kuching)

“(On the change of Prime Ministers in Malaysia and the inauguration of President Obama Barack in the U.S.) In terms of management we are much more systematic now... the changes of Prime Ministers... with different approaches to manage our country... like President Obama, you know...” (Interviewee 39, Indian, age 27 years, from Miri).

The third cohort, consisting of those who are in their late 30s and 40s, is labelled as ‘Social-strivers’ since they care mostly about economic stability and social welfare. Understandably, peace and security were brought in after the final capitulation of communists, and various developments began to take place since then. All these enhanced their living drastically. Many seem to be content with their lives until late 90s when economic breakdown and political unrest caught them by surprise. Two respondents said the following statements:

“(On economic crisis in 1997/98) Our country was hit by... I mean... economic downturn... so unfortunately also that was the year I graduated from my university.”

“(On Anwar’s sacking and lawsuit) I think in 1998 we had the worst political crisis in Malaysia because Anwar Ibrahim was sacked as the deputy Prime Minister... Of course it affects our lives because... normally our political situation is very stable, but suddenly because of this one we see people become willing to protest...” (Interviewee 13, Iban, age 37 years, from Seratok).

The fourth cohort, consisting of those who are in their 50s and 60s, is labelled as ‘Idealistic-strugglers’ as they lived in fear and doubt during the time of communism, and during British colonization and the formation of Malaysia. Despite having umpteen uncertainties, opinions and beliefs were generated during those times as to what were the actual situations and what could and should have been done. A Chinese and a Malay respondents recalled that:

“(On communism) I still remember when we were young, all the villages along the road to Serian were fenced up in the curfew time... sometimes when we travelled in a bus, there could be gunfire in front and then we had to stop because the guerillas were attacking... but after the surrender there was no more

gunfire, everything was at peace.” (Interviewee 08, Chinese, age 53 years, from Kuching)

“(On Sarawak joining Malaya)... I think if Sarawak did not join Malaya, life could be a bit better. Because Sarawak has lots of jungles, vast lands... oil also. Now Sarawak has joined Malaya... a lot of riches go to the peninsular. Here we don’t have, a little only...” (Interviewee 28, Malay, age 69 years, from Bintangor).

The fifth cohort, consisting of those who are in their 70s and beyond, is labelled as ‘Battling-lifers’ due to the fact that they had to find ways to survive during Japanese occupation. They also lived through the times of British colonization, communism and the formation of Malaysia. They believed in hard work, and were protective of their family. The followings are what two veterans had to say:

“(On Japanese occupation) During that time... Japanese came... Japanese planes and soldiers... we ate cassava only... all shops were ruined... I could not forget because my elder brother was taken away and there was no news of him ever since...” (Interviewee 26, Malay, age 82 years, from Bintangor).

“(On British colonization) ...Rajah Brooke managed to defeat the rebels... that’s why I am grateful to the European and to the British because they brought peace to the country, and also education...” (Interviewee 31, Iban, age 78 years, from Siburan).

Discussions and implications

Sarawakians Recalls Different Major Events

The findings for Proposition 1 confirm that major societal and historical events recalled by Sarawakians are indeed different from that of the U.S. It is simply because the cohorts in the U.S. do not have similar social and historical backgrounds. For example, Sarawakians in their 60s did not mention Cold War or the assassination of President JFK, nor did anyone in their 30s touch on new feminism movement. Similarly, the Baby Boomers in the U.S. certainly did not experience the formation of Malaysia, nor did Gen X and Y suffer from haze and SARS. Suffice to say that cohort labels and generation descriptions in the U.S. cohorts, despite being widely adopted, cannot be generalized to that of an emerging market like Sarawak. Notwithstanding the pervasive impact of some global events, it is evident that cohorts mainly reflect

the values emphasized during a country's particular historical period (Egri and Ralston, 2004). Hence the first proposition holds true, and is thus supported.

Different Age-groups Recalls Different Major Events

The findings for Proposition 2 also show that the major events recalled by different age-groups are generally different. For instance, out of 14 respondents who mentioned the tsunami in Aceh in 2004, about half of them are between 15-24 years old. Many of them also recalled events related to other natural disasters and outbreak of diseases. They also seemed to be concerned with elections in recent years. Moreover, six out of nine respondents aged 25 to 34 recalled the incidents of tsunamis either in Aceh or Japan. Five respondents spoke about haze in 1997 and 1998, and the same amount of respondents talked about the impact of the advancement in digital technology. Interestingly, only this group mentioned about the change of Prime Ministers in Malaysia in the last decade and the impact of the global economic crisis in 2008. Six of them considered the economic crisis in the late 90s impactful as well.

As far as the 35-to-44 age-group is concerned, most respondents regarded the economic crisis in the late 90s as something very impactful. Apparently this group is more concerned with societal well-being because a good number of them explained about impact of the outbreak of various diseases, flood, haze, and the improving of living standard after the time of communism with personal experiences. As for the older age-group in respondents who are 45 to 54 years old, they began to tell fragmented matters pertaining to communism. They also explained how the economic crisis in late 90s, and the improvement of living standard had impacted them.

With the age-group of 55 to 64, it is of no surprise that six out of seven respondents gave a good account on communist movement and curfew in Sarawak collectively. The older ones in this group also mentioned instances about the forming of Malaysia in 1963. Finally, the 65-and-above age-group talked mostly about British colonization, the good or the bad about the formation of Malaysia, and communism in Sarawak. Only those who are over seventy years old talked about Japanese occupation.

Even though individuals from different age-groups mentioned a few similar events, it is still apparent that a good number of events are

mainly and exclusively spoken by certain cohorts. This is further articulated when individuals were able to cite personal attachment as reasons why these events were influential to them. Therefore it is posited that the second proposition is also supported.

Attachment to Events during Formative Years Defines Generational Cohorts

The mentioning of similar major events or overlapping situations between two successive groups in fact suggests the initial cut-off ages to develop cases do not truly represent the actual cohorts. As discussed earlier, five generational cohorts, instead of six age-groups, were identified, and they are labelled as Neoteric-inheritors, Prospective-pursuers, Social-strivers, Idealistic-strugglers and Battling-lifers based on their respective engagement with the events during formative years. Younger groups do not seem to remember or cannot give a strong account about communism and Japanese occupation although they have read or heard about them. The older generations, in turn, do not regard the advent of computer and Internet as impactful in their memories though it is one of the greatest recent phenomena. This validates past studies on the formation of generational cohort, particularly the propositions made by Rogler (2002) about young adults being at the cusp of their early formative years and thus more prone to the impinging external events. As such the third proposition is also supported.

Management Implications

In addition to affirming the relevance of the sociological theories of generations in the context of Sarawak from the theoretical point of view, the findings and discussions also highlight two noteworthy managerial implications. Firstly, as the labels and descriptions of cohorts in the U.S. cannot be applied in Sarawak directly, and the identification of cohorts in the state cannot and must not be based on age-ranges suggested in western sources. This highlights the need for marketers and managers alike to reassess segmentation strategies and the understanding of consumers. As internal marketing is pivotal to organizational success, how employees of different ages are organized, managed and trained needs to be looked into again. Secondly, since Sarawak is made up by different generational cohorts, it gives business practitioners a whole new platform to review their strategies in order to exploit new opportunities in the market. Business tactics which did not

work in the past and new prospective approach can be reviewed with reference to generational cohorts in order to secure effective implementation and desired performance.

Conclusion

Even though the study has achieved its objectives, it is not without limitations. Firstly, instead of Malaysia, only the state of Sarawak was selected as the research site of the study. Therefore the scope is delimited to a region. Secondly, since this study is more exploratory in nature, interview rather than quantitative survey was executed. Despite addressing issues related to subjectivity, an empirical quantitative study is still needed to generalize the findings. Finally, content analysis was done manually instead of using computer-aided qualitative software. The two main reasons are that the study does not involve complicated topics, and the available software does not assist in interpretation of findings. Having said that, it is believed the findings generated by the software will be more organized and thus helpful in interpretation.

Hence, the study underscores the need to conduct quantitative survey in the future, and illustrates the prospects to further investigate the characteristics of each cohort, and their use as a segmentation approach in Sarawak. As the findings have suggested possible cross-over effects between cohorts, intergenerational relationships are something that can be delved into (Brannen, 2006). The study can also be extended to the national setting to determine the generational cohorts of Malaysia and serve as a basis to conduct similar studies in neighbouring countries and other emerging markets using the theories of generations. This would then provide a more holistic view of the subject matter, and enhance the understanding of consumers in developing countries. A deeper insight into the economic beings represented by these cohorts will also be determined.

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A Qualitative Inquiry into the formation of Generational Cohorts

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