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Campaign Structural Elements: Developing a Visual Concourse

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Abstract: Developing a concourse for any Q methodology study requires a rigorous process to attain a representative Q sample. This study used visual Q to explore how campaign structural elements on Instagram influence Generation Z's (Gen Z) perceptions regarding non-monetary-based cause marketing in South Africa. In this article, the authors reflect on how they employed a five-step process that involved scanning current South African and global campaigns, literature, Instagram posts, and trends related to cause marketing. Subsequently, 100 unique fictitious Instagram posts simulating actual brand activities were created and later reduced to a Q sample of 24 cards using Fisher's balanced block design and a Q sample matrix. In each phase of the five-step concourse development process, we also illustrate how Gen Z participants became campaign developers (or concourse contributors) through their reflections on organisations' corporate philanthropic activities. Although there is no definitive method to develop a concourse, the authors intend this article to provide a guide for other Q researchers in exploring and utilising different types of media to develop a visual Q sample.

Keywords: campaign structural elements, cause marketing, generation z, strategic communication, visual Q methodology

Introduction

Within Q studies, the concourse development is argued to be one of the most important but equally daunting stages to complete (Ramlo et al., 2019; Watts & Stenner, 2012). In Q, the concourse represents the various utterances, thoughts, opinions and overall discourse around a topic of interest, also referred to as the universe of communicability (Stephenson, 1986; Watts & Stenner, 2012). Items within the concourse take on many forms, including declarative statements, images, scents, objects, colours and practically anything that can be viewed subjectively (Brown, 1980). These concourse items should be self-referential, meaning that people project their personal opinions when interacting with them (Watts & Stenner, 2012). This initial stage of the concourse is infinite without predefined bounda-

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ries, referred to as the first-order concourse (Brown et al., 2019), and in this article, we offer how we developed our second-order concourse, which is understood as the statements which are proxy for the statements of the first-order concourse (Brown et al., 2019, p. 95). The technicalities of the concourse creation stage are especially complex when conducting a visual Q study. There are numerous factors that one must consider in relation to the context of their study. In the field of strategic communication, particularly in copywriting and strategy development, we have found that people's perceptions of content formats can vary significantly based on the tactics employed, the emotive visuals presented, and the language used. By examining these different elements, we were able to uncover unique perspectives about how individuals respond to these stimuli, which we considered while developing the concourse.

Previous visual Q studies have explored subjective topics, such as playground inclinations and views on beauty, among others (Hempel, 2021; Kuipers et al., 2022). The authors identified that throughout all these Q studies, the researchers either provide full details of their concourse development, or they have used approaches that are incompatible with the authors' research objectives. Obviously, we do not believe that there should be a standard or singular way to generate a visual concourse, nor are we of the view that any of the previously mentioned scholars' approaches to concourse development can be assessed on their validity, because context matters in these types of studies. Thus, in this article, we aim to contribute to filling the gap in the existing Q literature regarding the lack of reflections on visual concourse development. In the section that follows, we briefly discuss literature on Gen Z and cause marketing to demonstrate to other scholars that the process of developing a visual concourse is transferable. We also believe it would be unwise to skim over the disciplinary literature in favour of discussing concourse development exclusively, as the article would then be less accessible to the Q community.

This article demonstrates the concourse development process of a visual Q master's dissertation focused on cause marketing and Gen Z perspectives toward this specific corporate social responsibility variation. Cause marketing is the collaboration between profit-generating and non-profit organisations to tackle societal challenges, such as raising awareness about blood cancer (Sitto & Lubinga, 2021). Usually, organisations publish their community upliftment activities in annual reports, on social media profiles, on company websites, and through media outlet broadcasts (Trialogue, 2023). Thus, this public display of social responsibility found in cause marketing differentiates it from other types of corporate philanthropy, such as sponsorships and employee volunteering (Bühler et al., 2016). Globally, organisations continuously implement unique cause campaigns to draw customers' attention toward new cause-linked promotions (Konstantinou & Jones, 2022). However, organisations struggle to connect with Gen Z when it comes to appealing to customers regarding cause marketing initiatives. Gen Z individuals, born between 1995 and 2009 and currently aged 16-30 years old, are generally known for their prosocial behaviour in society, which is different from other generations, as Gen Z was born in an era of socio-political flux and digital hyperconnectivity (Francis & Hoefel, 2018; Marr & Yarbrough, 2022; Plessis, 2021). A DoSomething-Strategic (2019) report shows that organisations are ineffectively consolidating the campaign messages, resulting in Gen Z's poor reception of these marketing promotions.

Background

Cause marketing perceptions have not been explored before in Q methodology (specifically through visual statements). Additionally, participating in a cause marketing campaign is a subjective decision (i.e., no one is forced into contributing to charities; people decide for themselves which social cause matters to them). Thus, at the outset of this study, we thought it interesting to explore how Gen Z responds to campaigns in a Q methodology setting. To elaborate, in this study, we used a forced-choice distribution task, which requires participants to sort their Q cards onto a predefined distribution grid and continue until all the respective blocks are allocated a card (McKeown & Thomas, 2013). We believe having multiple cause marketing campaigns in front of the participant (audience) would mimic reality because organisations are constantly vying for people's attention to influence audiences' perceptions toward engaging in these initiatives (Champlin & Li, 2020; Grau & Folse, 2007; Human, 2016; Rusch, 2023; Vredenburg et al., 2020).

The primary research objective of this study was to investigate how campaign structural elements on Instagram influence Gen Z's perceptions of non-monetary-based cause marketing in South Africa. A concourse of 100 fictitious Instagram campaigns was created using a quasi-naturalistic strategy (McKeown & Thomas, 2013). The authors selected a Q sample of 24 cards using Fisher's (1971) balanced block design. A trial run with three diverse participants in terms of race, gender, educational background, current occupation, and Instagram usage was conducted to ensure the research instrument (Q sample) was comprehensible. During preparation, the authors enlarged and laminated the Q-sample cards to improve readability. The distribution board, an inverted-pyramid grid, was also enlarged to an A1 poster and laminated. Participants easily understood the instructions and were actively engaged in sorting.

This article will not extensively report on the findings from the Q factor analysis, which was addressed in a separate article (Sithole & Hattingh, 2024a), because the heavy disciplinary aspects of campaign structural elements would have had to be foregrounded. To address potential curiosity, the study identified three distinct viewpoints (Sithole & Hattingh, 2024a). In viewpoint 1, labelled *Keep it Practical*, participants who defined this factor preferred campaigns that were trustworthy and easy to engage with. In viewpoint 2, labelled *Stop Tokenising Causes*, participants expressed a dislike for brands that exploit social advocacy messaging purely for profit-driven motives. In viewpoint 3, labelled *Aesthetics and Accessibility are Crucial*, participants emphasised the importance of visual appeal and creativity in cause marketing campaigns.

Our approach to generating a concourse is unconventional. However, we want to reassure the reader that we are not deviating from the principles of Q. Rather, we are sharing our experiences of exploring an alternative method for developing a visual concourse. The findings from this study were presented at a strategic communication conference (Sithole & Hattingh, 2023) and at a Q methodology conference (Sithole & Hattingh, 2024b). For those interested in a comprehensive account of the results, the full dissertation is available for review (Sithole, 2024), along with a presentation on the Zoom Q Seminar YouTube channel (Zoom QSeminar, 2024). The authors will provide insight into their concourse development and into the systematic process they used to arrive at their Q sample. We believe this focus on the concourse creation process could be a meaningful contribution to Q methodology research, especially because it is a visual Q study.

Introduction to the Five-Step Procedure

Visual Q: Compressing a Lot in One Frame

When conducting a visual Q study, several aspects must be considered before forming the final Q sample. These reflections are influenced by the research question that needs to be addressed. Moreover, the participants who will sort these cards must be accommodated regarding their ability to comprehend the material they are presented. Previous visual Q studies investigated how participants react to subjective topics such as playground inclinations, perceptions of beauty, feelings toward Instagram journalism content, self-representations through selfies (self-photographs), and favourability toward organisational logos (Chung & Kinsey, 2019; Hempel, 2021; Kuipers et al., 2022; Lobinger & Brantner, 2016; Thomas & Greenwood, 2017). A common thread throughout all these studies is that they appear to have employed a systematic approach to formulate their concourse and, subsequently, their Q sample. In some cases, they went beyond using Fisher's balanced block design. To illustrate, Hempel (2021) examined how children interact with various playground spaces in relation to their personality traits and connection to outdoor environments. Within Hempel's (2021) concourse development, the author gathered insight from movies, books, advertisements, and general observations during field inspections. From this exercise, themes related to children's experiences of playing emerged. Additionally, instead of following the usual format of photographs in visual Q studies, Hempel (2021) used watercolour drawings to represent the numerous ideas from the concourse. A similar approach was used in this study, as the authors decided to independently create original visual Q statements (i.e., designing Q visual cards using Canva instead of using readily available online images).

Campaign Structural Elements: What are They?

Cause marketing campaigns often feature numerous call-to-action clauses designed to persuade customers to purchase cause-linked products or support a purpose-driven charity. These clauses are referred to as campaign structural elements, and they are included within messages such as flyers, posters and, more recently, digital advertisements to encourage customers to engage in initiatives run by for-profit organisations (Grau & Folse, 2007; Gupta & Handa, 2024; Human, 2016; Terblanche et al., 2022). Examples of different campaign structural elements from the author's concourse development are illustrated in Figure 1.

Figure 1

Campaign Structural Elements Examples



Social Cause: Breast cancer awareness
Campaign Structural Element: Monetary donation (Five Rands, written as R5).



Social Cause: Community upliftment
Campaign Structural Element: Non-monetary donation (1 book purchase results in one lunch pack donation).

Note. Figure 1 provides examples of Q sample items related to cause marketing. These fictitious ads were developed by the authors.

Figure 1 shows two examples of cause marketing campaigns that can be posted on Instagram. The first one on the left shows a fictitious campaign that raises awareness about breast cancer, and the copy states, "Like this post, and we will donate R5 towards breast cancer-fighting organisations." (R5, or 5 Rand, refers to South African currency.) This first campaign includes a clause stating the brand facilitating the initiative encourages Instagram users (specifically Gen Z) to "like," or engage, with the post to trigger donations to non-profit organisations. The second campaign on the right informs customers that one lunch pack is donated to schoolchildren for every book they purchase, helping to uplift their community. The authors concentrated on two campaign structural elements: the product type, indicating the kind of item sold, and donation-recipient proximity, which relates to the geographical, cultural, or psychological distance between the consumers buying a product and the donation recipients (Grau & Folse, 2007; Varadarajan & Menon, 1988).

Concourse Development

This study used a naturalistic (McKeown & Thomas, 2013) concourse development strategy to create fictitious Instagram cause marketing campaigns. In this study, the Q sample was created using dialogue (interviews) from Gen Z participants, real Instagram cause marketing campaigns, sustainability reports, social responsibility case study videos, charity advertising posters and numerous other CSR-linked communications. Within the Q community, discussions about using naturalistic, ready-made, or hybrid Q samples are often

rich, and researchers constantly push the boundaries when employing any of these approaches (Hempel, 2021; Thomas & Greenwood, 2017). An interesting aspect that other Q researchers reflect on is the potential outcomes of using different concourse development strategies. In other words, our strategy was to try to reflect the cause marketing campaigns to replicate the advertisements that Gen Z would typically encounter in their lives. For example, Hempel (2021) used visual Q in her study because she wanted children to enjoyably understand their inclinations toward playground environments. Thus, Hempel (2021) sources materials such as movies, drawings, and pictures that children would typically encounter in their lives. Moreover, Wijngaarden (2021) aimed to enable non-readers to understand non-traditional Q statements by providing extensive support from local Maasai research assistants. Similarly, the authors utilised visual Instagram campaigns to engage with Gen Z participants in a memorable way. We must state upfront that we are not recommending our proposed approach of generating a concourse as the standard or norm for visual Q studies. Rather, we suggest that our approach could help others address complex applications of concourse stimuli, such as videos and audio files, and yield comprehensive answers to their research questions. The authors developed a five-step process which was specifically designed for this study. We recommend that other researchers explore concourse development approaches that are relevant to their studies.

Step 1: Literature Review

Before the authors could develop the visual elements of the concourse, they engaged with literature linked to how customers, particularly Gen Z individuals born between 1995 and 2009 (Plessis, 2021), perceive cause marketing campaigns in terms of how the campaigns are designed and presented to them. South African cause marketing research has numerous studies that use traditional research methodologies (i.e., qualitative, quantitative and mixed-method approaches) (Human, 2016; Matiringe-Tshiangala & Nhedzi, 2022; Moyo et al., 2022). All these studies served different purposes; however, the authors deviated from this trend to understand the perceptions of cause marketing communication among younger customers. This research shift is justifiable because participating in cause marketing is a subjective decision (i.e., no one is forced into contributing to charities; people decide for themselves which social cause matters to them). Additionally, it should be noted that the authors did not only use visual Q to differentiate themselves from other researchers in South Africa. We aimed to expand knowledge on cause marketing to contribute meaningfully to the discourse occurring within strategic communication globally, focusing on avoiding "epistemological polarities" (Overton-de Klerk, 2023, p. 8) and the topical hierarchical positioning between quantitative and qualitative research methodologies (Werder et al., 2018). The authors explored research linked to how campaign messages are framed (negatively or positively), reviewed historical shifts connected to how cause marketing is practised, and investigated literature dealing with how to appeal to prosocial Gen Z prosocial consumers (Gupta & Handa, 2024; Moharam et al., 2020; Tanford et al., 2020; Thomas et al., 2020).

Step 2: Material Review

A material review was conducted to explore nuances in how a cause marketing campaign appears on Instagram and the tactics brands use. The process of conducting a material review drew inspiration from the studies by Hempel (2021), Thomas and Greenwood (2017),

and Human (2016). Regarding each Instagram post, the authors identified a partnership between a for-profit brand and a non-profit organisation, a specific type of non-monetary-based (NMB) campaign (i.e., Buy-One-Give-One; to trigger donations toward charities, customers must first purchase a cause-linked product and brands will match their donation), campaign focus (i.e., women empowerment, Pride month awareness, Nelson Mandela Day, etc.), a campaign structural element, and the country in which a specific campaign was promoted. The authors gathered 40 initial Instagram posts and assessed their qualities, flaws, unique features, and call-to-action clauses. The limitation of using only 40 cards was purely because we had gathered enough examples to work with in the study. Of those 40, we attempted to select various types of campaigns that may be deemed creative, successful, unsuccessful and so forth.

We also reflected on how we could build fictitious examples of these posts that mimic real campaigns. Fictitious Instagram posts, presented in the following sections, were developed to circumvent participants' familiarity with certain brands, as this could have conflated the study's findings. A similar approach was employed by Badenes-Rocha & Ruiz-Mafé (2022). This was also used as a preventative measure against potential copyright violations or negative reporting of brands' marketing campaigns.

Step 3: Synthesising Insight

At this stage, findings from the literature and material review were synthesised to develop 12 preliminary fictitious campaign posts shown to Gen Z participants that would help develop the concourse of this study. These posts were used to assist the authors in constructing an authentic Q sample that the final Q-sorting participants could understand and relate to. These Gen Z participants (three of them) were not included in the Q analysis phase but instead they formed part of the qualitative interviews in a different section of the Master's study which is not the key focus in this manuscript. Inspiration from real-life cause marketing activities was drawn to ensure that our fictitious campaigns appeared genuine and kept participants engaged during the Q-sorting process. Additionally, selecting three participants was appropriate because we wanted to explore what else we had overlooked in terms of the Instagram campaigns. We did not set out to gather a large number of participants, and any researcher should independently reflect on the necessity of recruiting a specific number for their own study. For example, the authors identified two Instagram cause marketing campaign posts that used similar strategies. In this instance, #KeepingGirlsInSchool and #BuyOneFeedOne encouraged their Instagram followers to consider purchasing cause-linked products (i.e., buy one packet of cat food, and we [brand] will donate an exact packet to animal shelters). We created a menstrual hygiene support campaign, "1 Pack = 1 Donation." Thus, this process was used to develop 100 unique concourse statements/visuals.

Step 4: Dialogue with Participants

Another necessary part of the concourse development process involved engaging with Gen Z participants to understand their thoughts toward cause marketing. bbrief (2022) reported that 71% of South African Gen Zs believe brands should engage in community upliftment projects. Additionally, this generation wants brands to communicate their CSR initiative using creative storytelling that captivates them (Plessis, 2021). Thus, these findings show that Gen Z has subjective opinions about how campaigns should be designed and

crafted. This encouraged the authors to conduct interviews with three Gen Z participants who were knowledgeable about creating social media posts, whether for personal or work-related reasons, and who engaged in some form of prosocial activity (i.e., participation in volunteer work).

The participant profile of the Gen Zs who participated in the concourse development is as follows: These individuals come from diverse socio-economic backgrounds; they are all South African, and at this stage of the study, we did not explicitly exclude anyone from participating based on their demographic characteristics. Gen Z Sunflower (aged 22) founded her own charity/foundation, while Gen Z Jasmine (age 21) and Gen Z Daisy (aged 21) are both part of a community engagement program at their church. These participants mentioned that they have used numerous methods (i.e., social media posts, pamphlet handouts and general conversations with other people) to spread the word about their volunteer work. Based on this, we believe they were appropriate candidates to assist with the concourse development.

Involving Gen Zs in the concourse development stage helped reduce the authors' involvement in the whole process. A similar strategy was employed by other Q researchers, such as Wijngaarden (2017). By distancing ourselves (not the ultimate goal) from having 100% control over the development of the Q-sample cards, we allowed the Gen Z participants to become content contributors, which improved our confidence in the quality of the visuals. All the interviews lasted 45 to 60 minutes and were audio-recorded and transcribed with the assistance of Otter.ai. Thereafter, the transcripts were analysed using thematic analysis through Taguette, a free, open-source qualitative software (Rampin & Rampin, 2021), to collate the codes and merge any similar themes as stipulated by Braun and Clarke (2006). Some of the feedback from this stage was that Gen Z prefers to participate in charitable initiatives that align with their values and those that do not require too much effort to get involved. Additionally, Gen Z seeks engaging marketing campaigns that are purposeful in terms of the social impact they create. However, Gen Z also advises brands to consider engaging strategies to retain their attention. Some Gen Zs stated that cause marketing campaigns can be invasive because they sometimes force them to donate; However, other Gen Zs willingly give to charity. Negatively framed imagery, such as using photos of the impoverished, was not appealing to some Gen Zs.

To ensure that all the findings from the initial interviews contributed directly to the concourse development, the authors turned some of the statements from the engagement with participants into campaign structural element terminology that could be transferred to Q-sample cards during the design process (Figure 2). In this stage, the authors also drew inspiration from Brown et al. (2019), who also created statements by reviewing the exact words of participants to form authentic and insightful representations of their thoughts.

Figure 2

Concourse Development Insight

Statements from Gen Z Concourse Development Participants

I do not like these campaigns	I feel neutral about these campaigns	I like these campaigns
		
Raw Statements		
Negative Statements "It's giving "story" instead of a "post"" "Scroll past" "Not coherent" "Not even catching my attention" "Lots of text" "Profit driven" "Conditional donations" "Marketing strategy" "Promoting product over social cause" "Manipulative" "No meaning behind the campaign"	**Neutral Statements** "Bribing me" "Conditional gift giving" "I would not share" "Promoting the brand" "No link between brand and social cause" "Sceptical" "Two-way deal" "Expecting something in return" "Strategic convincing"	**Positive Statements** "Fresh Content" "Clean" "Exciting" "Memorable" "Positive message" "Personal" "Close to my heart" "No coupons" "Focus the support for donation recipients" "Don't push the brand (visually)" "Follow up on donation progress" "Mention the impact on the recipient's lives"
Statements translated into Campaign Structural Elements Terminology		
Negative Statements Translations Poor function-cause fit Purpose-washing communication Poor brand-cause fit Text-based imagery Aesthetically unappealing imagery Cause focused post with product image Negative emotional framing	**Neutral Statements Translations** Tactical messaging Product focused campaign Poor brand-cause fit Cause-focused with an image that is designed in an abstract manner.	**Positive Statement Translations** Perceived emotionality of images Appropriate brand-cause fit Aesthetically appealing imagery Meaningful donation recipient proximity Positive emotional framing Addressing a relevant social cause (purposeful) Cause-focused post with a beneficiary image

Note. Fictitious Q sample items created by the authors.

During the initial design process of the concourse, we asked Gen Z participants the following question: What would your ideal cause marketing campaign post look like? We also gave them an Instagram post template, paper, and a pen to sketch their ideal post. This approach helped the authors understand how some Gen Z individuals view cause marketing campaigns. Some participants mentioned that although they support several social causes in their capacities, they believe Instagram is not the best platform for "serious content" (i.e., socio-economically charged or triggering media). They use Instagram to escape their daily stresses and do not want to be bombarded with this corporate social responsibility-related content. Others, however, were open to engaging in cause marketing campaigns on social media, and one participant mentioned they would prefer to see some school-donation-related posts on their Instagram feed. During interviews, they mentioned they wanted simple but impactful messages, such as a fictitious campaign featuring the donation of shoes, stationery, and bags to local primary school children. The insights gathered at this stage shaped how the authors developed the 100 concourse cards and selected the final Q sample. The participants were given the freedom to tell us or show us visually what they deemed ideal Instagram campaigns.

Step 5: Creating 100 Instagram Fictitious Campaigns

After all the steps outlined above, the authors created a second-order concourse of 100 fictitious Instagram campaigns. One hundred cards may seem to be an inadequate number of visual statements to create a Q sample. On the other hand, some may argue that creating

100 fictitious Instagram campaigns seems excessive. After creating the 100 cards, we were pleased with the variety of cause marketing campaigns we had, which is a strategy that Hempel (2017) used. Aside from feeling that we had reached a saturation point (Hempel, 2017) in the concourse stage of creating the 100 cards, we wanted to ensure there was room to finalise the Q sample. In other words, we aimed to build a large inventory of concourse statements (cause marketing campaigns) to select from, reflecting the range of these types of campaigns.

Ultimately, our intention was to create enough cards to demonstrate the complexity of Instagram campaigns without letting this aspect overshadow the study, as what we were attempting to do was novel to the discipline of cause marketing in South Africa. Additionally, other visual Q scholars, such as Hempel (2021), also aimed for similar high volumes for the purposes of their study. We are not arguing that others should aim for high volumes of samples if they do not need to. Our approach is not excessive, nor did it dilute the impact of our study; instead, it opened doors to the different ways one could use the other campaigns that did not make it to the final 24-card selection. In other words, deciding on the limit or point of saturation of the concourse is dependent on the objectives, resources, constraints and pursuits of the researcher (Hempel, 2017).

Due to the granularity of the campaign structural elements on each visual card, the authors believe that this intense review of the different Q sample cards was rigorous enough to qualify as reaching a point of saturation within the designing of the data collection instruction process or get to a stage where we could develop a "balanced" Q sample that represented the opinion domain of cause marketing (Watts & Stenner, 2012, p. 59). However, it may appear that including images and text on a single visual Q card could lead to conflated results. In this study, however, that was not the case because cause marketing campaigns are typically constructed using text and images in real life. Thus, the authors thought developing a Q sample in this manner was appropriate. The inclusion of images and text is justifiable as we wanted to show that Gen Z engages in multimodal or hybrid media, and our Q-sample cards still constitute a visual Q.

Visual Q Statement Construction

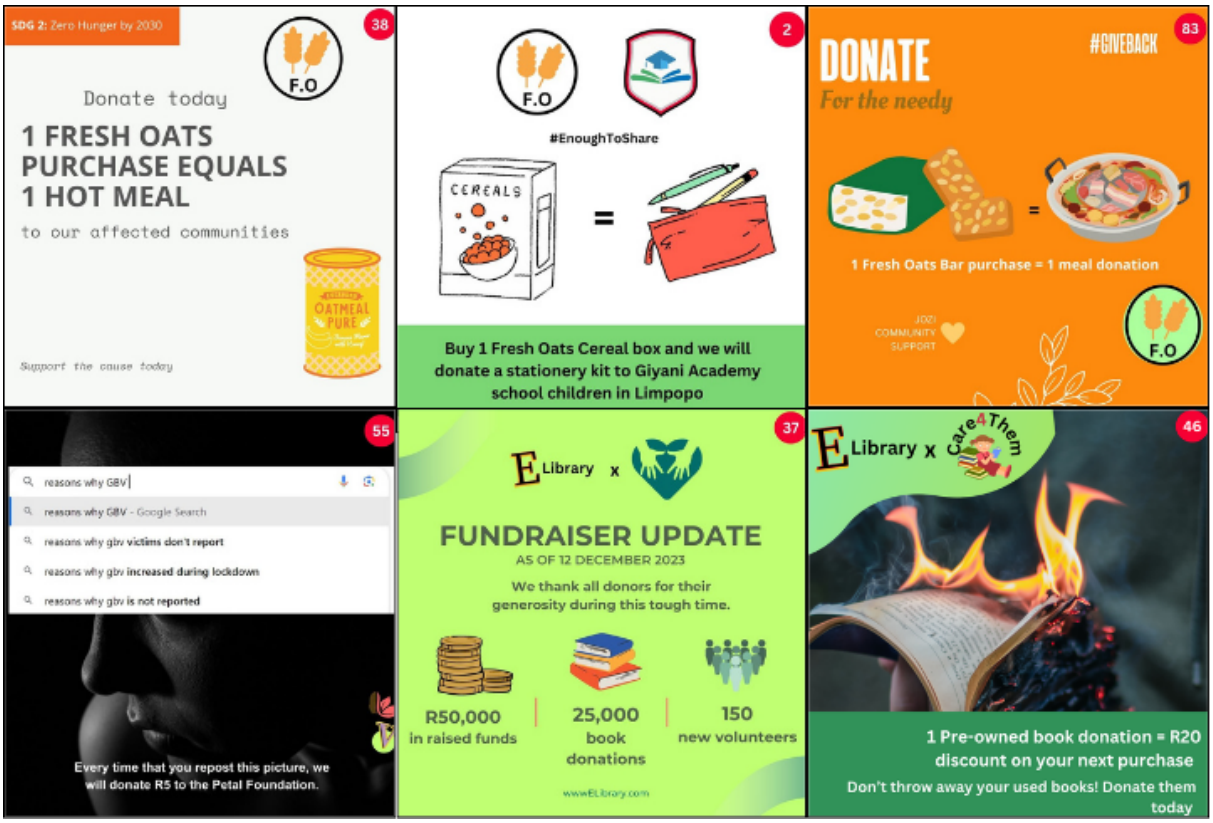
One of the initial hurdles the authors faced was deciding whether to elect a professional designer to develop the visual concourse or conduct this process independently. One of the authors is a student, and they opted to develop the concourse independently to avoid costs, authorship accreditation, and the stringent time frames of their dissertation submission. Another challenge was identifying the most affordable design creation platform to develop the Q sample, and Canva proved to be the best option. This is because the platform has attribution-free materials that novice designers can use. Concerning the copyright and use of creative tools, according to the Canva Free Media License Agreement (Canva, 2024), all free photographs, videos, and music files may be used for commercial or non-commercial purposes without any formal attribution being required. Canva is an easy-to-use online platform where novice and professional designers can use a wide range of royalty-free and paid subscription media to edit videos, create social media posts, presentations and many other forms of media.

Another beneficial aspect of using Canva was its vast inventory of images, icons and logos that the authors could use to develop Instagram-worthy content. Thus, the quality of the visual Q statement depends on the goals, parameters, focus, and structure with which

researchers are working. Figure 3 shows a few samples of the Q-sample cards they created, and we recommend that all visual Q cards developed by any researcher be interpretable.

Figure 3

Examples of the Visual Q Cards



Note. Fictitious Q-sample items created by the authors. The actual size of the cards used in this study was 8.4 cm (3.30 inches) in height and width.

Put differently, based on our experience, we recommend investing time to evaluate the cards that are made, review their size, adjust them accordingly, and be mindful of the colour scheme being used. We also suggest that, if other researchers collect visual Q-sort data in person, they should laminate their cards to increase durability (particularly when many participants are involved). Apart from the logistical aspects of developing the concourse, we recommend that future researchers ensure that their visual Q statements align with their study's disciplinary requirements. In other words, researchers must ensure that their visual Q statements comply with their study's objectives. In this study, the authors limited the number of campaign structural elements to two per card to prevent confusion and avoid overloading the campaign message presented to participants (Human, 2016).

Selecting the Q Sample

Fisher's (1971) balanced block design was used to maintain a fair distribution of statements representing the wider concourse (see Table 1). The concourse included two unique types of non-monetary-based campaigns: One-for-One and Buy-One-Give-One. Briefly, non-monetary-based campaign formats vary and include Buy-One-Give-One campaigns, where the organisation donates an equivalent product to charity for every consumer transaction. One-for-One campaigns involve various types of customer participation that differ from traditional or brand-centred promotions (e.g., reposting Instagram posts that result in donations to people in need) (Handa & Gupta, 2020). Within the retained cases of One-for-One and Buy-One-Give-One, there were four categories of these types of campaigns, namely, purposeful, ineffective, persuasive, and too complicated. These categories were defined using information obtained from the initial concourse dialogues with the members of Gen Z. At this point, the researchers wanted the participants' thoughts to drive the design of the cards. Thus, the categories are not bound by any strict definition from cause marketing literature. In other words, the categories Purposeful, Ineffective, Persuasive, and Too Complicated were derived from synthesising insights that were found during the initial dialogues with the members of Gen Z.

Purposeful: These campaigns were deemed practical as they tackle the root cause of social issues. During the initial dialogue sessions of this study, Gen Z participants expressed that they resonated with these campaigns because they appreciated their activities.

Ineffective: Gen Z participants mentioned that these campaigns did not appropriately address social issues due to the way the messaging was presented to them. The copy (design) in these posts was perceived as cluttered, and the objectives were unclear, which differs from the Too Complicated category in that the images are not appropriate for Instagram's context (i.e., too serious or heartbreaking).

Persuasive: These campaigns employed humour and metaphors to engage the audience, and Gen Z participants believed that these aspects made the campaigns more entertaining. Additionally, the imagery within the posts visually depicted the problem they are addressing.

Too complicated: These campaigns were not easily understood by Gen Z participants because there was no clear connection between the brands and the social causes being addressed. One Gen Z participant mentioned that the campaigns were not suitable for an Instagram picture post but rather a story post (photographs that are available for 24 hours) (Hootsuite, 2026).

Representation of Fisher's Balanced Block Design

This study's Q-sample selection pursued a 2x4 factorial design, including eight cells with 100 concourse cards. Each cell represents a campaign description category, which will be explained. The authors selected (n = 3) statements from each cell, resulting in a sample of

24 cards, as each card was designed to fit eight cells per block (2 × 4 = 8). Each Q-sample card was selected based on how each campaign's structural element was expressed in the advertisement, such as communicating how people can donate to a specific initiative, how the messages are presented, or the social cause the post promotes. Fisher's balanced block design helped the authors select the final 24 Q-sample cards by ensuring that a diverse range of cards was chosen. In addition to Fisher's design, the researchers used a Q-sample matrix to systematically explore the diversity of the different cards, as explained later.

Table 1

Representation of Fisher's Balanced Block Design of the Q Sample Selection

Campaign Category	Campaign Format	
	One-for-one	Buy-one-give-one
Purposeful	13	17
Ineffective	14	5
Persuasive	19	9
Too complicated	18	5

Note. Concourse (100 items); final Q sample (N =24)

Typically, within Q studies, the factorial structures used within Fisher's balanced block design are not used to test hypotheses but to promote the selection of diverse concourse statements to create the Q sample (Brown, 1980; Brown et al., 2019). Table 1 illustrates the 2x4 factorial design structure employed to establish the final Q sample, and each category is defined in Table 2.

The authors practised the principle of heterogeneity (diversity) (Brown, 1980) by laying out all the cards on a coffee table and systematically selecting statements or cards that differed in each cell (Figure 4). Conducting this process in person, with all the cards printed out, was an interesting experience and reminded the authors of how the Q samples "interact" with each other. In Brown (1980, p. 51), there is an excerpt from Stephenson (1953, p. 58) that discusses how, in R methodology, the sample (people, subjects, etc.) rarely has the opportunity to meet or interact with one another. In Q methodology, the samples exchange meanings with each other because, in this study, the authors made comparisons between each of the different cards, which the participants of our study also experienced.

Given that the study was related to social media, we thought it would be appropriate to use language and terms typically used by Gen Z when scrolling through Instagram. The conditions of instruction were: "If I saw these campaigns on my Instagram feed, I would Share them with my followers and comment on them;" "Look at them, but…they could be better;" and "Ignore and scroll past them." Although this is unconventional, during the pilot phase of the study we found that participants preferred to view the Q-sorting exercise as a "scenario-type activity," in which they decided whether certain social posts were worth their attention more than others. We do understand that in most Q studies, the condition of

Table 2

Description of Each Factorial Design Structure Category

Factorial Design Aspect	Description
One-for-One	Represents campaigns that ask participants to donate items outside of the traditional product or brand-based engagement (i.e., recreating videos to trigger donations towards an animal shelter (Handa & Gupta, 2020).
Buy-One-Give-One	Involves an organisation donating an equivalent product to charity for every consumer transaction (i.e., Buy one pen, and we [brand] will donate an exact one to schoolchildren).
Purposeful	Describes campaigns that address social causes through logical and sustainable strategies.
Ineffective	Describes campaigns that inauthentically support social causes to generate profits or boost their brand reputation.
Persuasive	Describes campaigns that are creative, humorous or use unique methods that are popular amongst audience members.
Too Complicated	Described as poorly designed campaigns that show no evidence of research during development stages.

instruction should aim to encourage participants to categorise statements from Most (-4) to Most (+4). However, in our study, we chose to use the phrasing because it was contextually relevant to the way Gen Z engages with content within digital spaces such as Instagram. Additionally, we found that during the initial interviews for concourse development, some participants expressed that reviewing the visual campaigns was more engaging than simply discussing them, as is typically done in interviews. This context-based approach to designing the condition of instruction, or ranking instruction, is not unique to this study alone. Thomas and Greenwood (2017, p. 208) also asked their participants to organise statements into three piles in a similar way, as participants were encouraged to begin the sort by categorising them in ways that they "definitely see themselves clicking 'like' on, ones that they were neutral about, and ones they didn't think they would click 'like' on." Overall, the goal of this deviation from the standard or traditional practice of "Most to Most" was to elicit meaning distinctions about the subject viewpoints of cause marketing campaigns from members of Gen Z.

Q-Sample Matrix

After using Fisher's balanced block design process outlined previously, the authors still wanted to ensure that all the 24 cards (Q sample) selected from the concourse represented the discourse around cause marketing. Thus, we developed a Q-sample matrix to systematically explore the diversity of the different cards. Indeed, one cannot fully guarantee that they have produced a "balanced" Q sample (Watts & Stenner, 2012, p. 59); however, the Q matrix in Table 3 provided an opportunity to capture the nuances of this study's endeavour to identify different perspectives on cause marketing campaigns. Other Q researchers have

Figure 4

Visual Representation of Fisher's Balanced Block Design (100 cards)



employed similar quality-control checks in their studies, such as Wijngaarden (2021), to improve the dependability of their studies. The authors believe that the Q-sample matrix could potentially play a similar role in convincing those unfamiliar with Q methodology that, in addition to Fisher's balanced block design, this process can be used to develop a focused concourse and, subsequently, a structured Q sample. Table 3 shows the numerous qualities found on the 24 cards, including campaign structural elements, campaign focus, non-monetary-based campaign categories and fictitious brand and product type categories. Table 3 should be read from left to right to understand the diversity of the Q sample. For instance, Q sample number 2 contains various types of campaign structural elements and different types of fictitious brands within the image, making it unique (as with the other Q-sample cards). In the case of this study, the Q-sample matrix in Table 3 indicates that the cards selected via Fisher's balanced block design are diverse, and the set of 24 visuals has an appropriate range in terms of their content. The only area in which we believe there could have been greater variation was the campaign category (Buy-One-Give-One or One-for-One). This segment of the Q-sample matrix shows that perhaps the authors should have included more campaign categories than just two. However, this is because non-monetary-based campaigns are novel, and organisations in South Africa typically switch between Buy-One-Give-One and One-for-One in their campaigns.

Table 3

Q-Sample Matrix

	Q sample (Visual Q-Cards)																							
Concourse Identification	65	75	37	83	38	80	3	30	18	54	100	82	46	2	41	31	55	19	79	50	29	59	96	95
Q sample Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Campaign structural elements																								
Product-Type	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X			X		X	X		
Donation Proximity		X		X						X				X		X			X		X	X		
Positively Framed		X	X	X	X			X	X	X		X		X	X		X	X				X		X
Negatively Framed	X					X	X				X		X			X			X	X			X	
Campaign category																								
Buy-One-Give-One	X	X	X													X			X		X			
One-for-One				X	X	X	X	X	X	X	X	X	X	X	X		X	X		X		X	X	X
Fictitious brands																								
Vector telecommunications											X				X		X			X				
Fresh Oats				X	X									X		X					X			
E Library			X				X					X	X					X						
Matimba Burgers	X	X								X														X
Q-Wave						X		X	X										X			X	X	
Strategic communication legitimacy																								
Purposeful		X							X		X				X		X		X					
Ineffective					X		X			X				X				X					X	
Persuasive	X			X								X	X							X		X		
Too complicated			X			X		X								X					X			X

The Use of Experimental Designs in Q Settings

Some of the elements from this study use experimental research designs, which are usually associated with quantitative studies. In fact, most cause marketing studies in South Africa use quantitative research methods to gather their data (Cui et al., 2003; Corbishley & Mason, 2011; Human & Terblanche, 2012; Human, 2016; Matiringe-Tshiangala & Nhedzi, 2022). For example, Human's (2016) cause-related marketing doctorate research included quantitative elements, and the researcher was interested in understanding how specific campaigns' structural elements influence participants' perceptions toward engaging in particular initiatives. In this study, Human (2016) included a questionnaire using a scale designed to investigate how participants responded to a brand's partnership with a specific non-profit organisation.

In our study, the meaning of "persuasive" within the campaign categories was not fixed. We examined how these types of categories are constructed by participants across various viewpoints. We understand that experimental designs have the goal of testing hypotheses, isolating variables, establishing cause-and-effect relationships, and creating generalizable findings (Plooy-Cilliers et al., 2021). Our hybrid techniques (Robinson & Mendelson, 2012) helped explore what Gen Z considers when they engage with cause marketing campaigns. Our process aimed to uncover social and emotional responses to visual cues without establishing causality between categories. The instruction phrasing was designed to evoke authentic responses rather than rigid ideas of "persuasiveness"; hence, there is no "persuasiveness scale" in this study. Cook et al. (1975) explain that experimental designs in Q studies can be used to allow participants to respond in specific ways to stimuli; however, we did not have predetermined hypotheses. Primarily, we were venturing in a different direction from the ordinary procedures of conducting cause marketing research, contributing to the discourse in the strategic communication discipline in which we are based.

Data capturing verification process when using Ken Q or KADE

The authors used Ken Q Analysis (version 2.0.1) (Banasick, 2019) to analyse Q sorts from this study. Although this article does not report on the Q factor analysis, showcasing how we accurately captured the data from the in-person sort to the Ken Q Analysis Programme would be worthwhile. Each Q sample card was given a unique identifier code (number) to accelerate the task of recording the Q sorting results accurately. The authors did the following in this regard:

a) A photo of the participant's Q sort was captured.
b) Each card was marked with a number (1 to 100 from the earlier concourse development).
c) The authors allocated a new number between 1 and 24 in an Excel spreadsheet for Ken Q to analyse.
d) The Q-card number was validated against the self-conceptualised Q-sample matrix.

All the cards have a unique identifier code (number), which was a vital part of designing the visual statements. This labelling of the cards made it easier to identify the cards that participants referred to in their interviews when we transcribed them. We also believe it

made it simpler for our participants to recall where they placed a specific card and compare it to other cards on their distribution board. Including the numbers on the cards is not a distraction and we recommend that other researchers identify similar ways to ease the troubles of recording and interpreting their data during the analysis phase of their work.

Can Unconventional Concourse Sources Be Methodologically "Valid"?

Our five-step concourse development process was participatory, which we believe enabled us to obtain a rich Q sample capable of generating unique insights. Our approach to developing a hybrid concourse is neither fully naturalistic nor based on existing samples, and we did not impose our views/biased interpretation of the dialogue from the Gen Z participants onto the 12 initial fictitious campaigns. We believe our interpretive approach was not biased, but it was a necessary methodological exercise in meaning-making (which is inherently embedded in Q's principles on subjectivity). Our interpretive approach to developing a concourse is not entirely novel; other researchers have pursued innovative avenues to explore this aspect of Q. For instance, Ramlo (2024) utilised artificial intelligence (A.I.) (specifically ChatGPT) to generate statements for a concourse in one of her studies. Of course, given that A.I. is not always entirely correct and sometimes may include inherently biased information within its responses, Ramlo (2024) navigated around these challenges by adapting the statements generated by ChatGPT to suit the objectives of her study (i.e., adapting heavily factual statements to become more open or flexible in nature). Similarly, in our study, we learned from the dialogue with members of Gen Z to develop the initial Instagram campaigns and interpreted and adapted their thoughts on the cards to develop a set of 100 concourse visuals. Thus, the insights gathered from Gen Z participants should not be viewed as data to be validated, but rather as a guide for refining the concourse. We argue that our approach to developing a visual concourse still adheres to the best practice of generating Q samples, as outlined in key texts by William Stephenson and Steven Brown (i.e., using Fisher's balanced block design). Additionally, we also explored alternative ways to create concourses, much like Ramlo (2025), using ChatGPT, and Hempel (2021), who demonstrated how material from movies, books, and television was utilised to create watercolour pictures that capture the sentiment represented in them and transform them into visuals for her concourse.

The researchers' positionality may be interrogated, and it is important to note that one of the authors is a Gen Z member. In subjectivity-focused studies, such as Q methodology, no scales, instruments, or standardised metrics can replace the researchers' effort to distance their idiosyncratic perspectives (Mboti, 2012). Thus, we were unable to eliminate our biases from this study. In other words, our interpretative approach to concourse development should not be seen as a threat, since "the researcher's personality already populates the researched text" (Mboti, 2012, p. 57). If we become overly focused on what constitutes a "valid" approach to concourse development, we risk striving for objectivity rather than allowing the process to be guided by curiosity. This is essential for exploring the complex world of cause marketing as well as any other subject we may investigate.

Conclusion

It is evident from this study's concourse development that Q researchers should follow procedures that are best suited to their research objectives. In this article, we wanted to reflect on the steps to achieve our final Q sample, which some other researchers may find challenging. The key takeaway was that, although creating original fictitious campaigns was time-consuming and resource-intensive, we essentially allowed our research participants to become campaign developers. This type of bottom-up engagement (i.e., breaking down hierarchical design processes and creating marketing campaigns) is a step in the right direction, involving customers who will inevitably be exposed to and/or consume the advertising content that organisations develop. Regarding Q methodology, the five-step process used is flexible and can be adapted to suit the needs of other researchers. We also propose using the Q-sample matrix with Fisher's balanced block design to enhance the exploration process and ensure that the Q sample represents the wider subject matter under investigation in a particular study.

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